Microsoft Content Management Server 2001

Content Connector for Commerce Server 2000 Business Desk User's Guide

Microsoft

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Using This Guide

What this guide is about

Welcome to Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000. By combining the content management power of the Microsoft Content Management Server 2001 with the personalization and e-commerce capabilities of Microsoft Commerce Server 2000, users can build and deploy complete commerce applications for the Web.

The *MSCMS 2001 Content Connector for Commerce Server Business Desk User's Guide* steps through personalizing the content of your site including creating and managing page profiles, personalized content objects, and rich content. A reference table is included in Appendix A outlining what components might be changed and who is responsible for changing them when customizing the Method Systems site (the sample site included with Content Connector).

This guide assumes you have a working knowledge of Microsoft Commerce Server 2000 and Microsoft Content Management Server 2001.

Who should use this guide

This guide is for the same e-commerce site business manager identified in Commerce Server 2000 Help. In addition to the responsibilities listed in Commerce Server 2000 Help, the business manager is responsible for managing and cross-referencing the editorial content with the e-commerce portion of the site by defining page profiles and personalized content objects.

How to use this guide

This guide covers the following topics and tasks, with an indication of where to find the information.

To do this...	Go to this chapter
Understand Content Connector workflow, roles, and responsibilities.	Chapter 1, "Understanding Content Connector"
Understand how Content Connector is integrated with the Commerce Server Business Desk and how the Method Systems sample site has been used.	Chapter 1, "Understanding Content Connector"
Create page profiles by extending the MSCMS page profile definition.	Chapter 2, "Creating Page Profiles"

To do this...	Go to this chapter
Manage page profiles from the MSCMS 2001 Web Author or the Commerce Server 2000 Business Desk.	Chapter 2, "Creating Page Profiles"
Target content to users—understand personalized content objects and the role of content expressions, content groups, and context filtering.	Chapter 3, "Personalizing Your Site Content"
Understand the difference between rich and simple product pages and how to create a rich product page.	Chapter 4, "Managing the Product Catalog"
Manage rich product pages from the MSCMS 2001 Web Author and the Business Desk	Chapter 4, "Managing the Product Catalog"
Setting guest and pre-registered user authentication.	Chapter 5, "Content Connector User Authentication"

Conventions used in this guide

We have used several document conventions in this manual to help you identify and find information.

Two components of the Microsoft® Content Management Server 2001, the MSCMS 2001 Site Builder and MSCMS 2001 Web Author are always capitalized. However, references to the server and database are not capitalized: MSCMS 2001 server and MSCMS 2001 database.

Information that requires special attention comes in three types as described below: Caution, Tip, and Note.

! Caution
Caution means reader be careful. In this situation, you might do something that could result in loss of data or degradation of product performance.

Tip
Tips provide helpful suggestions for using Content Connector effectively. Tips are not necessary to the basic understanding of the text.

Note
Note means reader take note. Notes emphasize or expand on important points in the main text around them. Notes can also provide information that applies only in special cases.

We also use typographical conventions to indicate specific information types in the documentation.

Convention	Usage in documentation
Bold	This style indicates menu items and buttons that must be clicked or selected. For example, "Once you have completed the form, click **Finish** to move to the next screen."
Italic	This style indicates the title of a book or manual. Most commonly it is used to refer to other manuals in the MSCMS 2001 information product suite.
`Monospace`	This style denotes source code and names of programming functions. For example, "When implementing image tags in HTML be sure to always use width and height attributes, as shown below." `<IMG SRC="PowerPanels.GIF" WIDTH="150" HEIGHT="150">`

For more information

The information products for Content Management Server 2001 are included on the product CD and include the following:

- *MSCMS 2001 Publishing API Help*: detailed reference information about the Publishing Application Programming Interface (API) exposed by the MSCMS 2001 server. This API is used by Web programmers in building an MSCMS 2001 site.
- *MSCMS 2001 Content Connector for Commerce Server 2000 Framework API Help:* detailed reference information about the framework for the MSCMS 2001 Content Connector for Commerce Server 2000 API. This API is used by Web programmers in building a Content Connector site.

The above information is in the form of compiled help (.chm) files.

The following information comes in Portable Document Format (PDF). You need Adobe Acrobat reader to access the PDFs—download a free copy from the Adobe site at `www.adobe.com`.

MSCMS 2001 Setup Guide: provides prerequisite information for installing Content Management Server 2001 with the InstallShield® Wizard, installing a database, configuring your system with the SCA, installing the MSCMS 2001 Content Connector for Commerce Server 2000 and unpacking a site, and installing the MSCMS 2001 Site Stager.

MSCMS 2001 Administrator's Guide: assists site administrators in the technical setup of the customer Web site using Content Management Server 2001 and MSCMS 2001 Content Connector.

MSCMS 2001 Page Template Designer's Guide: provides details about all aspects of template-based publishing, including creating templates for use in a multi-authoring environment.

MSCMS 2001 Site Programmer's Guide: provides comprehensive information for site programmers including the Web interface, the MSCMS 2001 Site Builder and MSCMS 2001 Web Author, MSCMS 2001 Content Connector, and working with, and customizing the MSCMS 2001 Publishing API and Content Connector Framework API.

Check our corporate Web site at `www.microsoft.com/cmserver`, for a variety of useful information.

For more information about Microsoft Commerce Server 2000

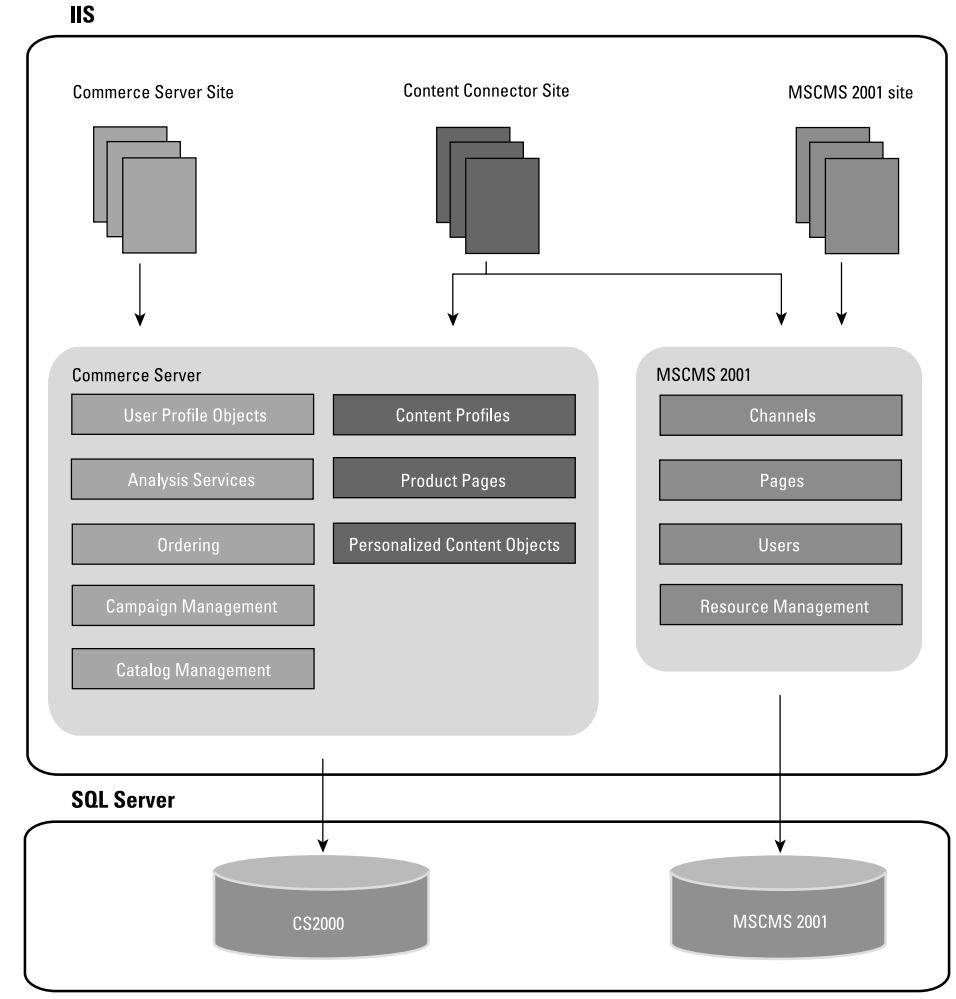
Commerce Server 2000 Help: an online help file that includes workflow, concepts, procedures, and reference material for Commerce Server 2000.

Chapter 1

Understanding Content Connector

What is Content Connector?

Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000 combines the content management of Microsoft Content Management Server 2001 (MSCMS 2001) with the e-commerce and personalization capabilities of Commerce Server 2000, as shown in the diagram below. This integration gives users the ability to create a seamless environment for building and maintaining personalized Web sites.



Content Connector architecture

Commerce Server handles the back-end infrastructure like credit card transactions, shipping considerations, and inventory management, while Content Management Server 2001 delivers Web site design, self-service authoring, template-based publishing, and site management. The combination of MSCMS 2001 and Commerce Server 2000 means users can cross-reference editorial content with the e-commerce portion of Commerce Server in a dynamic, content-driven site. This integration ensures:

- a rich, targeted, and personalized experience for site users
- rapid time to market
- low cost of deployment and ownership
- ease of use for both technical and non-technical users
- support for multi-device access.

Content Connector roles and responsibilities

The Commerce Server 2000 documentation identifies three areas of expertise found within an organization that uses Commerce Server to develop, deploy, and manage Web sites. They are:

- Business managers
- System administrators
- Site developers (referred to as site programmers in Content Connector documentation).

In addition to the responsibilities outlined in the Commerce Server documentation, Content Connector adds the following responsibilities to each role.

Role	Responsibility	Tools and user interfaces
Business manager	• Creates page profiles • Creates personalized content objects • Manages rich content created for Web site	• Business Desk • MSCMS 2001 Web Author
Site administrator	• Installs Content Connector • Customizes and deploys Method Systems sample site • Creates MSCMS 2001 user groups • Creates MSCMS 2001 channels • Creates MSCMS 2001 resource gallery	• Commerce Server Manager • MSCMS 2001 Site Builder

Role	Responsibility	Tools and user interfaces
Site programmer (site developer)	• MSCMS 2001 templates (in consultation with the business manager)	• MSCMS 2001 Site Builder • Commerce Server 2000 Business Desk

Commerce Server 2000 Business Desk and Web Author

Content Connector uses both the Commerce Server Business Desk and the Web Author to help you create rich, targeted, and personalized experiences for site users.

Commerce Server Business Desk

Content Connector is fully integrated with the Commerce Server Business Desk application. Content Connector extends the Business Desk by including two new categories, Content and Targeting. These categories include seven new modules, as shown below.

New Content Connector categories and modules



Modified Business Desk

Content

The Content category contains two modules (outlined in the table below). Use these modules to create and manage the content on your site.

Content modules	Usage
Page Profiles	This module is used to manage page profiles and is where you access the Web Author to create, edit, and approve pages.
Product Pages	This module is used to view the product catalog(s) and determine which products have a rich or simple page. You can also create a rich product page from this module.

Targeting

The Targeting category contains five modules (outlined in the table below). Use these modules to create and manage personalized content objects.

Targeting modules	Usage
Personalized Content Objects	This module is used to create personalized content objects by selecting the content group, target group, page position, page group, and context targeting.
Content Groups	This module is used to gather one or more content expressions in order to deliver the desired content.
Content Expressions	This module is used to create content expressions that specify the content you want to target.
Page Positions	This module is used to determine what content will appear in specific positions on your site. For example, you may want a page position for all news articles or product specials.
Publish PCOs	This module is used to publish changes to production, refresh the personalized content object cache, and delete a personalized content object cache.

MSCMS 2001 Web Author

The Web Author allows you to quickly create, publish, and approve new Web content such as product reviews and news articles.

In the Method Systems sample site that ships with Content Connector, the Web Author is fully integrated with Commerce Server 2000 and includes site functionality such as user login and personal shopping baskets.

Roles and rights for authoring, editing, and approving pages are defined using the MSCMS 2001 Site Builder (see the *MSCMS 2001 Site Administrator's Guide* for more information on assigning rights).

The Method Systems sample site

Content Connector ships with a sample site based on a fictitious company called Method Systems. Method Systems sells computer equipment including, desktops, notebooks, personal digital assistants (PDAs), and servers. The Method Systems sample site is packaged as a .pup file and is included on the Content Connector CD. Instructions for unpackaging the Method Systems sample site are in the *MSCMS 2001 Setup Guide*.

Sample scenarios in this guide

This guide includes sample scenarios that you can follow. They provide examples of how certain tasks such as creating page profiles and personalized content objects were done for the Method Systems sample site.

Customizing the Method Systems sample site

You can use the Method Systems sample site as a starting point for building your own site.

As the business manager, you are responsible for certain aspects of customizing the sample site. Appendix A lists the components and data from MSCMS 2001 and the Commerce Server Business Desk that you can customize. It also indicates whose responsibility they fall under.

For more information about customizing the Method Systems sample site see Chapter 12, "Customizing and Deploying Content Connector" in the *MSCMS 2001 Site Administrator's Guide*.

Chapter 2

Creating Page Profiles

Overview

Understanding page profiles

If you want the pages you create appearing on specific areas of your site and to specific users, you need to give that page a profile. Essentially, the page profile tells the page what to do and how to act. For example, a page profile on the Method Systems site identifies whether the page is an article about servers or desktop computers, a technical article or a business article, or when it is expected to appear live on the site.

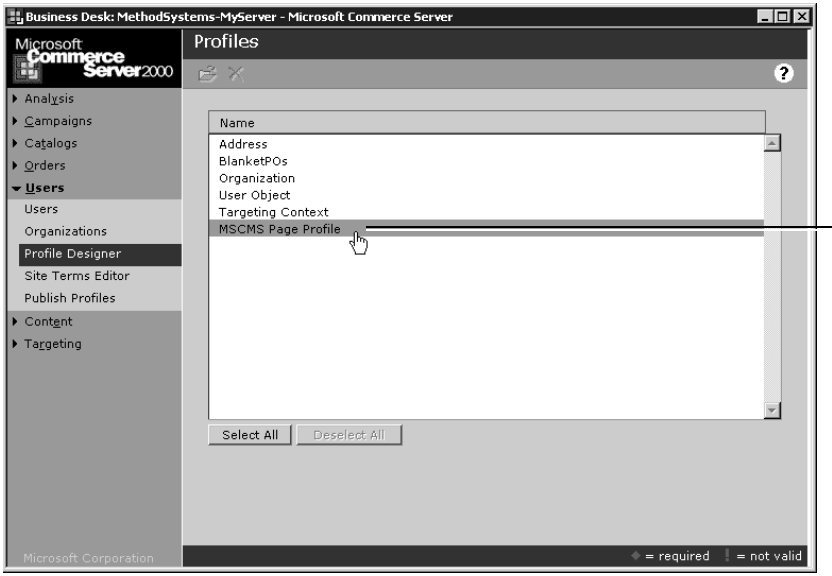
A page profile is a collection of properties describing a page. These properties are mapped to a database table or tables (just as user object properties are mapped for user profiles in Commerce Server).

To add properties to the page profile definition, you use the Profile Designer module. (You may find it helpful to review the "Profile Designer" section in Commerce Server 2000 Help.) The Page Profile module is used to edit and manage page profiles.

MSCMS Page Profile definition

Page profiles are extensions of Content Connector's MSCMS Page Profile definition, which has been added to the Profile Designer. The MSCMS Page Profile definition consists of a set of properties that are further defined by a set of attributes. You set these properties and attributes based on your site needs.

One of the most important decisions you make when designing the business rules for your site is how to profile your pages. This is done by extending the MSCMS Page Profile definition and adding or modifying its properties and attributes using the Profile Designer module on the Business Desk.



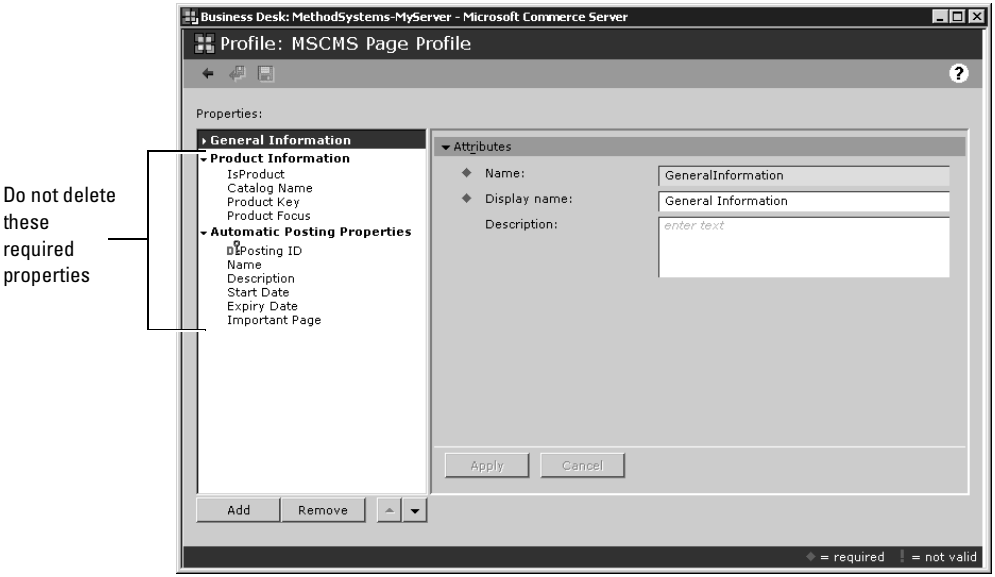
Properties

Properties determine what information is collected about a page. For example, in the Method Systems site, the MSCMS Page Profile definition includes properties that determine the product focus, the start and end date, and keywords.

! Caution

While you can add or delete properties to the Page Profile definition, there are nine properties that must be present for all pages which are profiled. Do not delete these properties. Personalized content objects and the rich product catalog need these properties to function. They are:

- IsProduct
- Catalog Name
- Product Key
- Posting ID
- Name
- Description
- Start Date
- Expiry Date
- Important Page.



Property types: site terms

Commerce Server includes property data types which can be strings, numbers, dates, site terms—see Commerce Server 2000 Help for a complete list of property types. In many cases, the data type you assign to a property will be a site term.

Site terms are used to match values so you can target your content to appropriate users and in the appropriate context. Site terms list values that are specific to your site. For example, Method Systems needs a site term for the products they profile on their site. Therefore, the values for a site term defining the product focus includes: desktop computers, servers, notebooks, and personal data assistants (PDAs).

For more information on site terms and creating them, see Commerce Server 2000 Help.

Attributes

Each property has attributes that provide information such as what type of property it is: a site term, date, string, or number. Attributes govern how a property is used in the site. As with user or organization profiles, page profile properties have two types of attributes: advanced and custom.

Advanced attributes

Advanced attributes explain how a property is used, for example the attribute might indicate if the property is active or inactive.

Custom attributes

Custom attributes display how a property is displayed on the site. For example, you can hide a property if it is something you don't want the user to see, or make it read only if it's necessary that the user see it, but not modify it. Content Connector has added the following custom attributes that you can assign to a property:

Custom attribute name	Value	Purpose
ResolutionBizDeskDisplay	ReadOnly	Assigning this value means it is only visible in the Business Desk.
	ReadWrite	Assigning this value means it can be modified in the Business Desk.
	Hidden	Assigning this value means it is hidden in the Business Desk.

Custom attribute name	Value	Purpose
ResolutionWBCDisplay	ReadOnly	Assigning this value means it is only visible in the Web Author.
	ReadWrite	Assigning this value means it can be modified in the Web Author.
	Hidden	Assigning this value means it is hidden in the Web Author.
ResolutionDefaultValue	The value you can choose from depends on the property.	Assigning this attribute provides guidance to authors when they create content. Users see this default when creating or editing a page profile.

Note
If you do not set a value, the default value ReadWrite is applied.

Extending the MSCMS Page Profile definition

Note
Properties are mapped to a database table or tables. In the Method Systems sample site, the MSCMS Profile database includes five extra columns suitable for string or site term properties. More columns can be added to suit the needs of your customized site by your site administrator.

1 Open the Business Desk and expand Users, click the **Profile Designer** module.
2 In the content pane, select MSCMS Page Profile and click **View** from the toolbar.
3 Click **Add** at the bottom of the Properties section. The Add dialog box opens.
4 Select Add a New Property and click **OK**.
5 In the Attributes section, do the following:

Use this	To do this
Name	Type a name for the property. (The name cannot contain spaces, for example, ProductFocus.)
Display Name	Type a display name for the property, for example, Product Focus.
Description	Type a description for the property (optional).
Type	From the drop-down list, select the property type (for example, site term).

6 In the Advanced Attribute section, do the following:

Use this	To do this
Active	Select whether the new property is Active or Inactive.
Map to data	Click **Browse**. The Data Source Picker dialog box opens. In the Data Source Picker dialog box, select a property from the data source defined for Page Profiles.
Multi-valued	Ensure Multi-valued is not checked.

The remaining fields in this section are optional. See Commerce Server 2000 Help for more information.

7 To add a custom attribute, in the Custom Attribute section, click **New** and do the following:

Use this	To do this
Name	Type the name of one of the attributes listed in the section "Custom attributes" in this chapter. The name cannot contain spaces, for example ResolutionBizDeskDisplay.
Display name	Type the name you want displayed.
Description	Type a description for this attribute (optional).
Value	Give your attribute a value.

8 Click **Accept**.

9 Click **Apply**.

10 Click **Save and Back** from the toolbar to save your changes and return to the main Business Desk.

11 In Users, click **Publish Profiles**.

12 From the Publish Profiles pane, select the profiles you want to update. Click **Publish Changes to Production and Refresh Cache** from the toolbar.

Sample scenario: page profiles

Method Systems sells computer equipment and all their products need to be categorized. This is done by creating

- Product site terms
- Product focus properties
- Product focus attributes.

Content Connector matches the page profile with the profile of site users in order to deliver the appropriate content to the user in the appropriate context. This scenario from the Method Systems site shows you how the MSCMS Page Profile definition was extended by adding a product focus property and how this property matches the product focus property for the user profile.

Product site terms

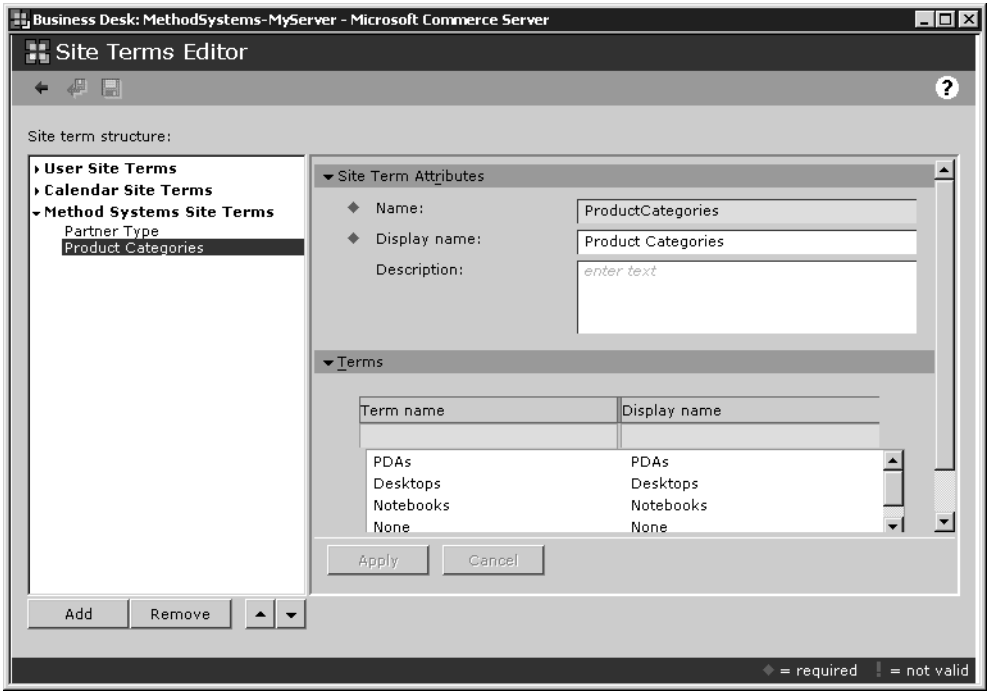
1 Open the Method Systems Business Desk.

2 From Users, click **Site Terms Editor**. The Site Terms Editor window opens.

3 In the Site Term structure window, expand Method Systems Site Terms. Click **Product Categories**.

4 In Site Terms Attributes section, notice that the name is set to ProductCategories (no space).

5 In the Terms section, notice all the types of products are listed: servers, desktops, etc. Click **Close** from the toolbar (do not save any changes).



Site Terms Editor window

Product properties

1 From Users, click **Profile Designer**.

2 In the Profiles window, select Page Profile. Click **View** from the toolbar. The Profile: Content Profile window opens.

3 From the Properties section, expand Product Information. Click **Product Focus** (keep this Profile window open and proceed to "Product focus attributes").

Product focus attributes

4 In the Attributes section of the MSCMS Page Profile window, notice the name is set to ProductFocus (no space).

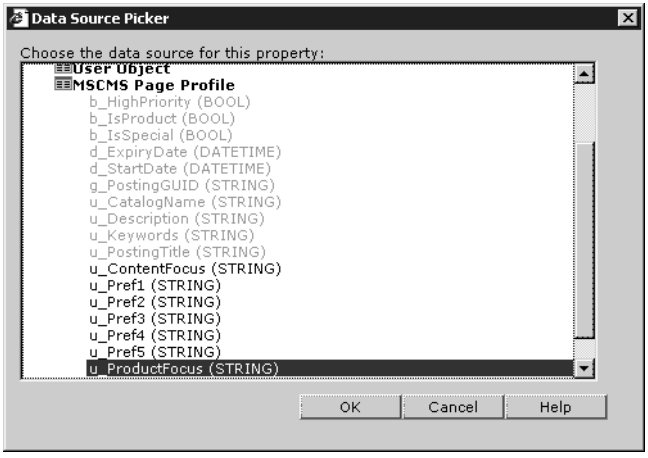
5 Notice the Type is set to Site Term.

6 In Type reference, click **Browse**. The Site Term Selection window opens.

7 Expand Method Systems Site Terms. Click **Product Categories**. In the Values section, notice the site term values that are listed indicate the types of products (servers, notebooks, etc.). Click **Cancel**.

8 In the Advanced Attributes section the site is Active (this means it is on the Business Desk).

9 In Map to data, click **Browse**. The Data Source Picker window opens. Notice the data source is the Profile Service_SQLSource and Profile is expanded. The information is mapped to the u_ProductFocus (STRING). Click **Cancel**.



Data Source Picker window

10 In Custom Attributes, notice the ResolutionBizDeskDisplay and the ResolutionWBCDisplay has a value of ReadWrite. This means it can be modified in both the Business Desk and the Web Author.

11 From the toolbar, click **Close** (do not save any changes).

Managing page profiles

Profiles can be managed from both the Web Author and the Business Desk.



Note

Use the Web Author or the Business Desk only to create pages and manage page profiles. You cannot use the Site Builder to manage page profiles; using it to create or delete pages can leave you with profiles, but no corresponding pages. See the section "Page profile clean-up utility" later in this chapter for information on how to solve this problem if it occurs.

Creating and managing profiles in the Web Author

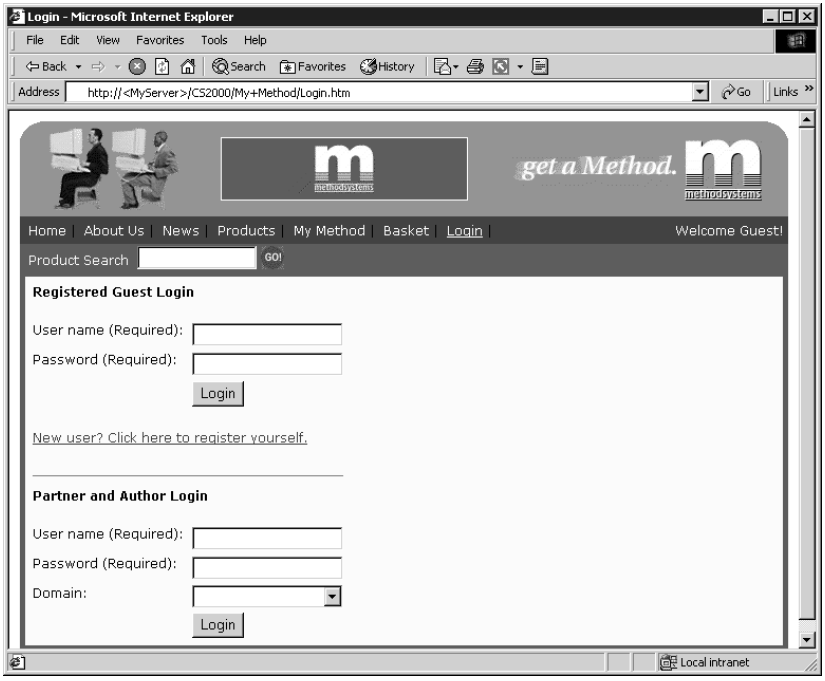
Creating a page in the Web Author

You can insert images, video, hyperlinks, and attach documents to your page using the Web Author. (For more information on authoring pages in the Web Author see the sections "Understanding the authoring process" and "States of pages and postings" in Chapter 8, "Working from the Sample Web Author" in the *MSCMS 2001 Site Programmer's Guide*.)

You must have authoring rights to the channel where you want to create a page. The examples reflected in the following sections are of the Method Systems sample site.

1 Open your browser and type the uniform resource locator (URL) for the Content Connector site: `http://<your server name>/<your site name>`.

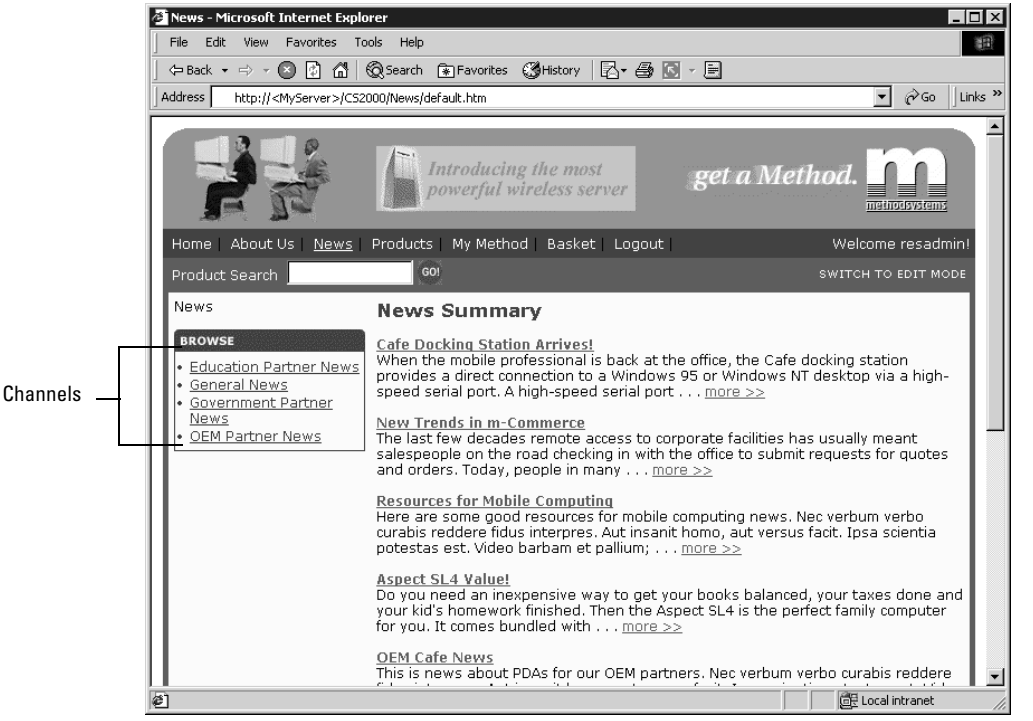
2 From the header, click **Login**. The Login page opens.



My Method login page

3 In the Partner area, fill in your user name and password. Click **Login**. (For Method Systems, if this is the first time you're logging on, you will go directly to the MyMethod page where you can expand your user profile. Click **Home** on the header after you update your profile.)

4 Click the channel where you want to create your page (for example, on the Method Systems site, click the link News and then click the subchannel General News).



5 From the header, click **switch to edit mode.** The Tools Menu appears.

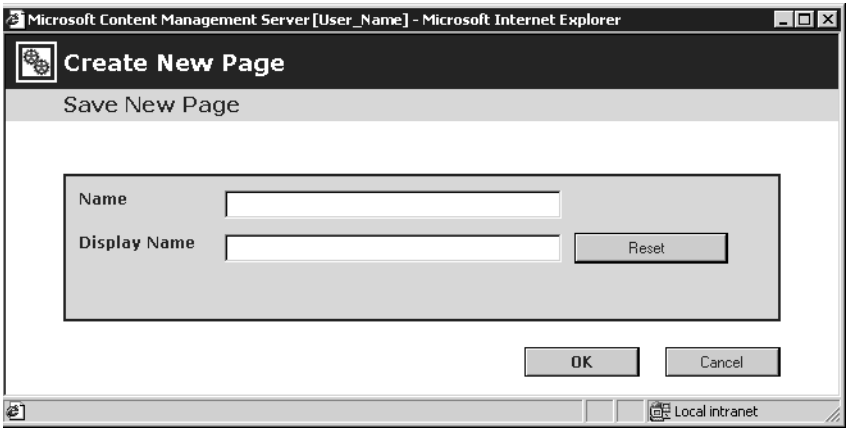
6 Click the Tools Menu. A console opens.

7 Click **Create New Page**. The Select Template Gallery window opens. Click the gallery that contains the template you want (for example, in the Method Systems site, click News). The number in parentheses indicates the number of templates in that gallery.

8 Click **Select** for the template you want to use.

9 Type or paste your content in the appropriate placeholders.

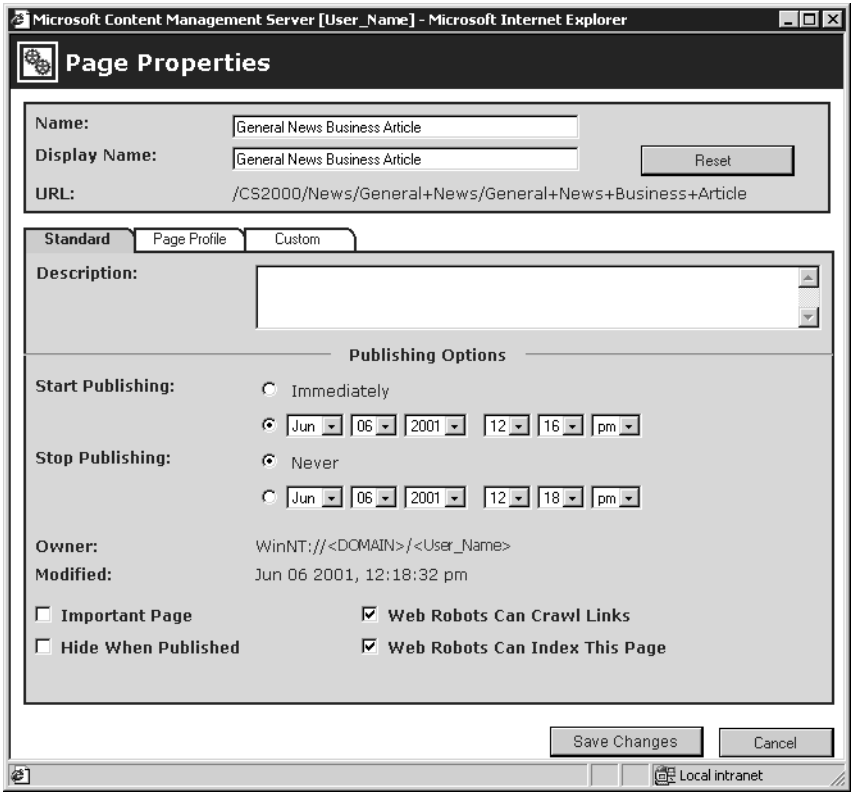
10 From the Tools Menu console, click **Save**. The Save New Page window opens.



11 When you have finished filling out the New Page fields, click **OK**.

12 From the Tools menu console, click **Save and Exit**.

13 From the Tools menu console, click **Page Properties**. The Page Properties window opens.



Page Properties window

14 Fill out the appropriate fields on the Standard tab, Page Profile tab, and Custom tab. Click **Save Changes**.

15 From the tools menu, click **Submit** to send the page for approval.

Editing a page in the Web Author

You must have the appropriate rights to edit pages.

1 Open your browser and type the URL for the site: `http://<your server name>/<your site name>`.

2 From the header, click **Login**. The Login page opens.

3 In the Partner section, type your user name and password.

4 From the header, click **switch to edit mode**. The Tools Menu appears.

5 Go to the page you want to edit.

6 From the Tools Menu, click **Edit**. Make the changes to your page. Click **Save and Exit** when you are done.

7 From the tools menu, click **Submit** to send the page for approval.

Approving a page in the Web Author

You must have the appropriate rights to approve pages.

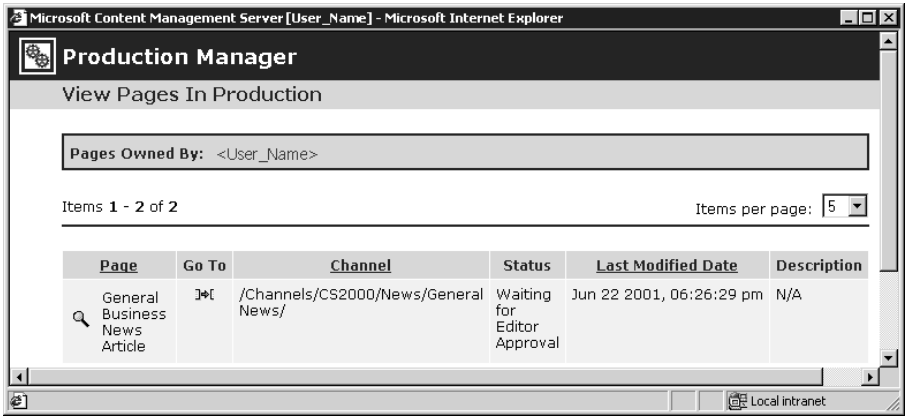
1 Open your browser and type the URL for the site: `http://<your server name>/<your site name>`.

2 From the header, click **Login**. The Login page opens.

3 In the Partner section, type your user name and password.

4 From the header, click **switch to edit mode**. The Tools Menu appears.

5 From the Tools Menu, click **Production Manager**. The View Pages In Production window opens.



Production Manager window

6 Select the page you want to approve and click the symbol under the GoTo column.

7 From the tools menu, click **Approve** if you are satisfied with the page.

8 Click **switch to live site** to see your page as it appears on the site.

Editing a page profile in the Web Author

1 Open your browser and type the URL for the site: `http://<your server name>/<your site name>`.

2 From the header, click **Login**. The Login page opens.

3 In the Partner section, type your user name and password.

4 From the header click the area on the site where your page is located.

5 Go to the page you want to edit.

6 From the header, click **Change to edit mode**. The Tools Menu appears.
7 From the tools menu, click **Page Properties**. The Page Properties window opens.
8 Make the necessary changes in the Profile tab. Click **Save Changes**.

Deleting a page in the Web Author

Deleting a page deletes both the page and the page profile.

1 Open your browser and type the URL for the site: `http://<your server name>/<your site name>`.
2 From the header, click **Login**. The Login page opens.
3 In the Partner section, type your user name and password.
4 From the navigation bar click the area on the site where your page is located.
5 Click the page you want to delete.
6 From the tools menu, click **switch to edit mode**.
7 From the tools menu, click **Delete**. A dialog box opens. Click **OK** to permanently remove the page from the system.



Note
If you delete a page profile from the Web Author you need to refresh the Page Profile module in the Business Desk or click **Find** to refresh the list. The page profile will then be deleted from the list.

Creating and managing page profiles in the Business Desk

Finding a page profile in the Business Desk

From the Page Profile module you can search for and list page profiles for any pages with a profile.

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 Examples of how to use the find function are listed below.

Use this	To do this
Profile keywords	Search for a page profile by keywords.
Special	Search for all page profiles that are specials by typing **1** or **True**. Search for all page profiles that are not specials by typing **0** or **False**.

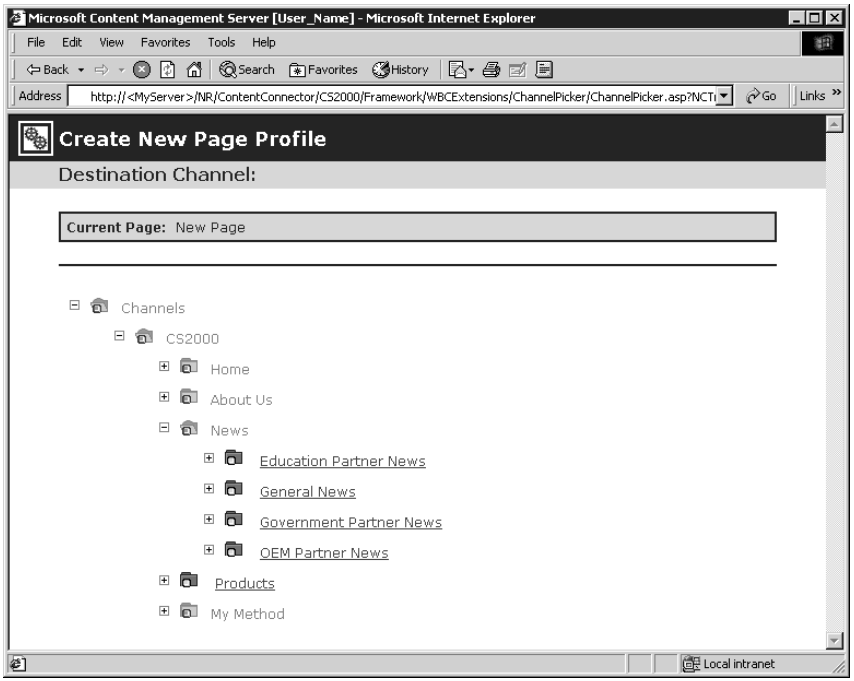
Use this	To do this
IsProduct	Search for all page profiles that are products by typing **1** or **True**. Search for all page profiles that are not products by typing **0** or **False**.
Name	Search for a page profile by its name (you must enter the full name or use a wildcard character, see the tip below).
Start Date	Search for a page profile before or after a certain date.
High Priority	Search for all page profiles that are high priority.
Find by property	Search for all page profiles using any other property.

Note
You can include a wildcard character (*) entry to help your search. For example, **m*** matches all products or articles that begin with the letter "m." To find all page profiles use the wildcard only (*) and click **Find Now**.

Creating a page in the Business Desk

1 Open the Business Desk and expand the Content category. Click the **Page Profile** module.

2 Click **New Page Profile** from the toolbar. (You may have to log on, if this is the first time you are logging on to the Web Author.) The Web Author Create New Page Profile Destination Channel window opens.



Destination channel window

3 Select a channel for your posting. The Select Template Gallery window opens.

4 Select a template for your posting. The number in parentheses indicates the number of templates in that gallery.

5 A list of the templates appear. Click **Select** beside the template you want to use. A new page appears in the author mode.

6 Follow the steps in a previous section of this chapter, "Creating a page in the Web Author."

Editing a page in the Business Desk

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 In the Find window, select a search criterion from the Find by drop-down list.
3 Select the page you want to edit. From the toolbar, click **Goto the Selected Page**. The page you selected opens in the Web Author.
4 Follow the steps in the previous section, "Editing a page in the Web Author."

Deleting a page in the Business Desk

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 In the Find window, select a search criteria from the Find by drop-down list. Fill out the field below and click **Find Now**.
3 Select the page you want to delete. From the toolbar, click **Delete the Selected Page**.
4 In the Delete Page Profile box, click **Yes** to delete the page and its profile.
5 From Targeting, click the Personalized Content Object module.
6 From the toolbar, click **Refresh**.

Approving pages in the Business Desk

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 In the Find window, select a search criteria from the Find by property drop-down list.
3 From the toolbar, click **View Pages Awaiting Approval**. The Pages Waiting for Approval Window opens.
4 Select the page you want to approve. Click **Approve**.

Editing a page profile in the Business Desk

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 In the Find window, select a search criteria from the Find by drop-down list. Fill out the field below and click **Find Now**.

3 From the toolbar, click **Open the Selected Profile**. The Update Page Profile window opens.



Update Page Profile window

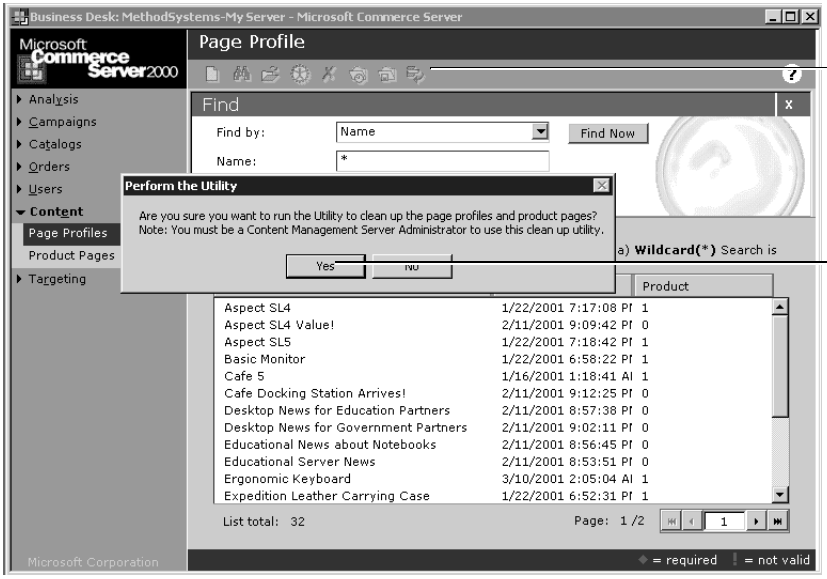
4 Edit the profile to suit your needs. From the toolbar, click **Save and Back** when you are done.

Page profile clean-up utility

If you find yourself left with profiles, but no corresponding pages do the following:

1 Open the Business Desk and expand the Content category. Click the **Page Profiles** module.
2 Click **Goto the utility to clean up page profiles and product pages** on the toolbar.

3 From the Perform the Utility dialog box, click **Yes** to run the utility. Note, you must be an MSCMS 2001 administrator to run this utility.



When you run this utility for the first time a log file is created in `Inetpub\wwwroot\MethodSystems\CS2000Util`. Every time you run the utility, the date and time is recorded in this log file. This log file will only be created if you are the MSCMS 2001 administrator.

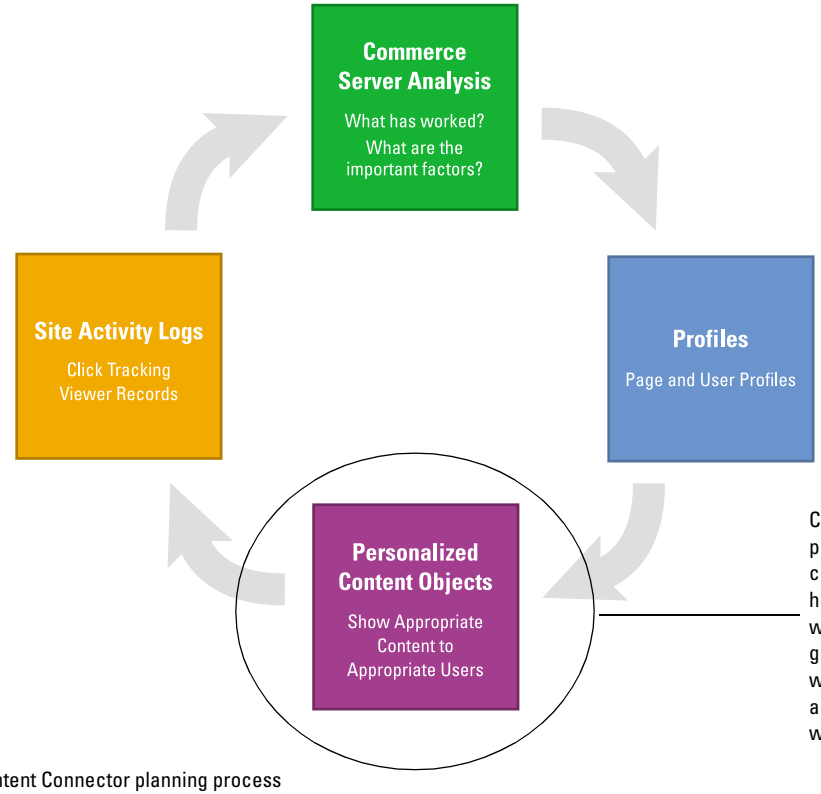
Chapter 3

Personalizing Your Site Content

Overview

Understanding Personalized Content Objects

As a business manager planning your site you must define the page and user profiles (Chapter 2, “Creating Page Profiles”). The next step is to decide what content is going to appear, where it will appear, and who is going to see it. You do this by creating personalized content objects.



Content Connector planning process

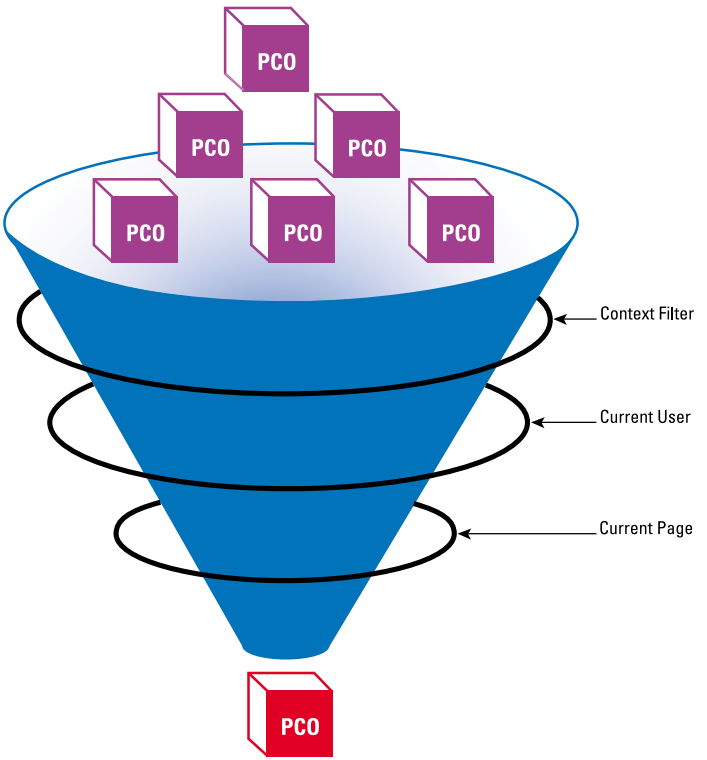
Personalized content objects are used for site-wide content control. They allow you to link articles and similar pages on your site to relevant product information, and to link product pages to relevant editorial content.

How personalized content objects work

Personalized content objects deliver collections of page profiles to templates. These profiles are used by templates to create page summaries that are displayed to the user. Personalized content objects are run using a mechanism known as a pipeline, a standard part of the Commerce Server 2000 content selection framework (see Commerce Server 2000 Help for more information about pipelines and the content selection framework).

When a user requests a page that contains a personalized content object pipeline, information about the current user and the current context within the Web site are sent to the pipeline. Based on your targeting and filtering definitions, personalized content objects currently active in the Web site are evaluated to determine which ones are suitable for the current user in that particular context.

Once it has been determined which personalized content objects apply to this page request, these objects then retrieve the page profiles that have been defined for them. The returned profiles are given a ranking, calculated based on their relevance to the current user in the current context.



Personalized content object process

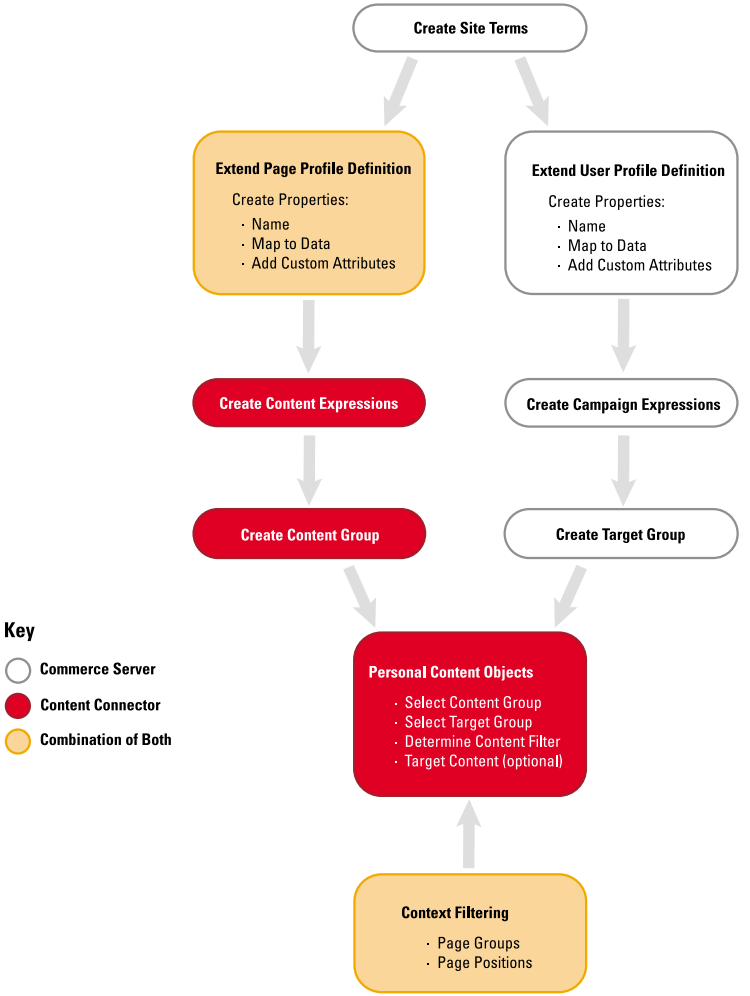
As shown in the "Personalized content object" diagram, the pipeline operation does these steps:

- **Content selection.** The remaining personalized content objects are queried for their content, and the content is blended to form a final, ranked collection of page profiles. These are then returned to the template, which uses this information, for example, to display summaries. See "Creating a content group" in this chapter for further details.
- **User targeting.** Personalized content objects can also specify which users they are meant for. The personalized content objects remaining after filtering are ranked, or in some cases eliminated, based on the profile of the current user. See "Target groups" in this chapter and Commerce Server 2000 Help for further details.
- **Context filtering.** From the pool of active personalized content objects, all of those that do not apply to the current page type are eliminated. Personalized content objects can also specify the specific page positions they apply to, and when specified, personalized content objects not defined for the current position are also eliminated. See the section "Context filtering" in this chapter for further details.
- **Context targeting.** Personalized content objects can also specify what specific content should be on the current page in order for them to be active. The personalized content objects are further ranked, or in some cases eliminated, based on their specified context targeting preferences. See "Context filtering" in this chapter for further details.

Personalized content object workflow

Below is a possible workflow for creating personalized content objects:

- Extend the page profile definition (discussed in Chapter 2, "Creating Page Profiles").
- Create content expressions and content groups (this chapter).
- Create campaign expressions and target groups (this chapter) (not always necessary).
- Filter and target content (this chapter).



Content selection

To create personalized content objects, determine what content you want selected and which users you want the content to go to. You do this by defining content groups and target groups. Content Connector has added content groups to the Business Desk to help you personalize your site content.

While target groups specify one or more campaign expressions, content groups specify one or more content expressions in order to define what set of page profiles belong to the group.

How content groups work

Content groups are objects that define a set of page profiles that share some common properties. For example, a content group could define the set of page profiles where `Special = True and IsProduct = True`. In this case, all profiles that match this criteria would be in the "Product Specials" content group.

Content groups are created by combining a number of content expressions. Each expression specifies the value that one of the property items in the content group should have. In the example above, one expression is `Special = True` and another expression is `IsProduct = True`. The "Product Specials" content group is created by combining these two expressions.

Scoring in content groups

A scoring mechanism is applied to the profiles within a content group. A score specifies the relevance of a profile to the group. The score of a profile is set using the special "Target" and "Reduce" actions. The scores of profiles that match any expressions specifying the target action are increased, and similarly, the scores of any profiles that match reduced expressions are reduced.

For example, a Products content group could use the following two actions:

```
IsProduct = True (Require)
Special = True (Target)
```

All profiles that belong to this group have their IsProduct flag set to true. In this case, special profiles have higher scores than those that are not special. These scores allow profiles to be sorted before the information is presented to the user.

Content expressions

Each expression in a content group is associated with an action. The action defines what the role of the particular expression is when defining the set of profiles in the content group. One such action is the "Require" action. When you specify "require," only page profiles that match the required expression are included in the content group. Another action is "Exclude." When you specify "exclude," the page profiles that match the excluded expression are not included in the content group.

Content expressions are a combination of properties, Boolean and relational operators, and values that determine if a page profile is selected or not. For example, if you want to select all pages about servers, your content expression would read:

```
page profile.ProductFocus is equal to Server.
```

Creating a content expression

1 Open the Business Desk and expand the Targeting category. Click the **Content Expressions** module.

2 Click **New Content Expression** from the toolbar. The Content Expression window opens.

3 In the Content Expression window, do the following:

Use this	To do this
Name	Type a name for the content expression (for example, **ServerNews**).
Description	Type a description for the new content expression.
The expression is based on the following conditions	Click **New**. The edit boxes are activated. • From the first drop-down list box select the Page Profile and the option you want (for example, **ProductFocus**). • From the second drop-down list box select an operator type (for example, **is equal to**). • From the third drop-down list box, select the property or value to be evaluated by this expression (for example, **Server**).

4 Click **Apply** and then click **Save**.

Creating a content group

Creating content groups is similar to creating target groups in Commerce Server 2000.

Personalized content objects specify one content group to define the set of page profiles to be returned by the personalized content object pipeline.

Combining content expressions to create a content group

1 Open the Business Desk and expand the Targeting category. Click the **Content Groups** module.

2 Click **New Content Group** from the toolbar.

3 In the Content Group window, do the following:

Use this	To do this
Content Group Name	Type a name for the new content group.
Expression	Click **New**. From the drop-down list, select the expression you want to use to create the new content group.
Action	From the drop-down list, select the action for the new content group based on how you want them to appear. **Require.** All profiles matching this expression are included, except those that match any exclude expressions. **Exclude.** Page profiles that match this expression are not included in the content group. **Target.** Page profiles in the content group that match this expression increase their score. **Reduce.** Page profiles in the content group that match this expression reduce their score.

4 Click **Accept**.

5 Click **Save and Back** from the toolbar.

Sample scenario: content groups

The following scenario outlines content expressions and content groups created for the Method Systems site.

Content expressions

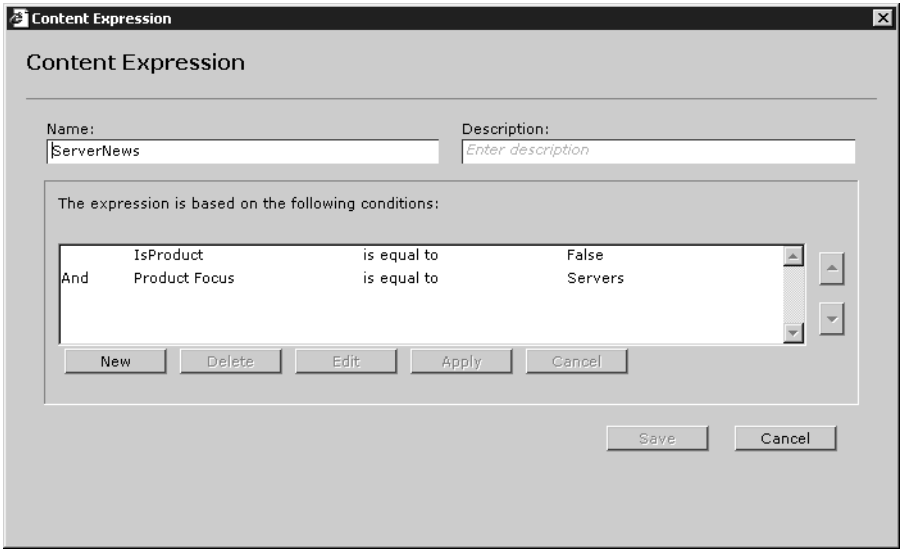
1 Open the Business Desk and expand the Targeting category. Click the **Content Expressions** module.

2 Click ServerNews from the list of content expressions. Click **View Content Expression Properties** from the toolbar.

3 Notice the conditions:

IsProduct is equal to False And Product Focus is equal to Servers

This expression is targeting all page profiles that are not products (therefore they are news articles), and that are about servers.



Content Expression window

Click Cancel to close the Content Expression window.

4 Select All Product Specials from the list of content expressions. Click **View**.

5 Notice the conditions:

IsProduct is equal to True And Special is equal to True

This expression is targeting all products that are identified as special.

Click Cancel to close the Content Expression window.

Content groups

1 Open the Business Desk and expand the Targeting category. Click the **Content Groups** module.

2 Click **Server News** from the list of Content Groups. From the toolbar, click **Open Content Group**.

3 Notice in the Content Group: Edit window that ServerNews is set to Require. Click **Back** from the toolbar.

4 Select Server Products from the list of Content Groups. From the toolbar, click **Open Content Group**.

5 Notice in the Content Group: Edit window that ServerProducts is set to Require. Click **Back** from the toolbar.

The first content group says that this content group only includes pages about ServerNews. Therefore, any pages not about ServerNews will not be included. The second content group says that this content group only includes pages about ServerProducts. Therefore, pages not about ServerProducts will not be included.

What pages these content groups will be shown on and what users the content will be shown to, is determined by creating a personalized content object.

User targeting

Target groups and campaign expressions

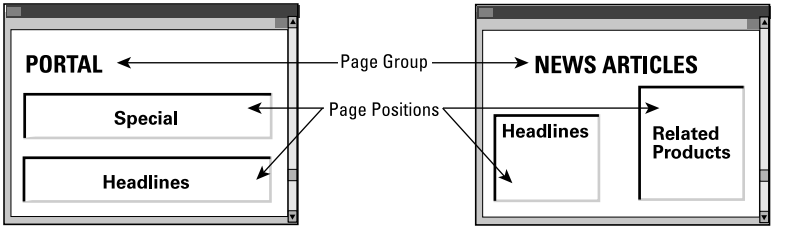
While content groups select what page profiles to target, target groups select which users should see what page profiles. Personalized content objects can have both content groups and target groups defined.

Target groups are selected using the Target Group module in the Campaigns category. For more information on creating campaign expressions and target groups, see Commerce Server 2000 Help.

Context filtering

Filter-based context targeting "switches" personalized content objects on or off based on the context information about the page being displayed to the end user.

There are two ways in which content is targeted to pages on a site. The first is by page group and the second is by page position.



Page groups and page positions

Page groups

Personalized content objects use Commerce Server 2000 page groups to target specific locations on a site.

Adding a new page group

1 Open the Business Desk and expand the Campaigns category. Click the **Reference Tables** module.

2 In the Reference Tables screen, in the Page Groups section, click **New**. Do the following:

Use this	To do this
Page Group	Type a name for the new page group. For example, **Articles**.
Description	Type a description for the page group.

3 Click **Accept**. The new page group is added.

4 Click **Save and Back** on the toolbar to save the new page group and return to the Campaign Manager screen.

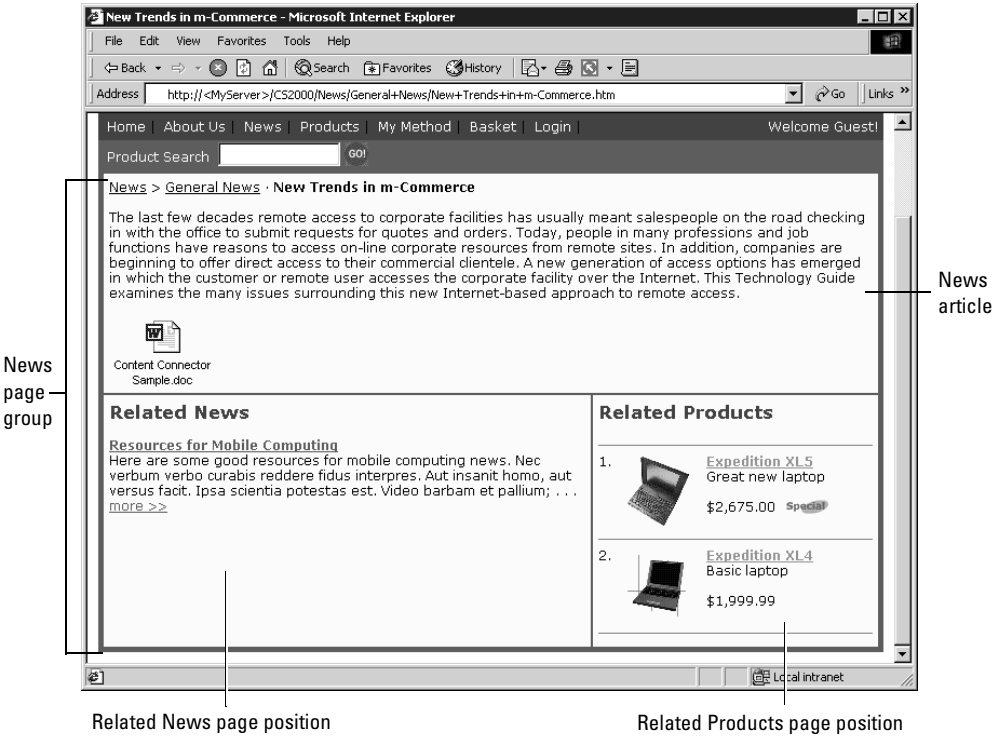
Page positions

Page positions provide an additional filtering stage to location-based targeting. They are set up with the site designer when creating the templates for the site.

For example, the Method Systems sample site has the following page groups and page positions:

Page group	Page position
• All • Home • News • News Summary • Product Summary • Products	• All • Headline News • Product Special • Related News • Related Products

Note the two different page positions on the new page.



Context targeting

Personalized content objects provide targeting based on the page profile of the page currently in context. Users can:

- Target pages whose profiles belong to the content group already specified for the personalized content object. For example, on the Method Systems site, you can provide links to other server articles on every page about servers.
- Target a specified content group. For example, you can put a list of server news pages on every page about server products.
- Target any. For example, you can put a list of server news pages on every page.

You assign what page profiles to target in the appropriate context when you create a personalized content object.

Creating a personalized content object

Before you can create a personalized content object you should have already created:

- Page profiles
- Content expressions
- Content groups (and possibly target groups)
- Page groups
- Page positions.

1 Open the Business Desk and expand the Targeting category. Click the **Personalized Content Objects** module.

2 From the toolbar, click **New Personalized Content Object**. The Personalized Content Object Editor opens.

Use this	To do this
General	• In the Name field, type a name for the personalized content object. • In the Description field, type a description for the personalized content object. • In the Status drop-down list box set the status to Active or Inactive.
Content Selection	From the Content Group drop-down list, select the content group you want to target and indicate what you want returned: • **All Pages** or, • <number> of **Most Recent Pages**, or • <number> of **Most Relevant Pages**
User Targeting	You have the option to select one or more target groups. Select the group you want to target and click **Add**.
Context Filter	To target all page groups, click the check-box, **All Page Groups**. Or, select one or more page groups and click **Add**. To target all page positions, click the check-box, **All Page Positions**. Or, select a page position and click **Add**.

Use this	To do this
Context Targeting	To match the content group selection you indicated in the Content Selection section, check the box **Match Content selections**. Or, select another content group from the Content Group drop-down list.

3 Click **Save and Back** on the toolbar to return to the Business Desk.

Sample scenario: personalized content objects

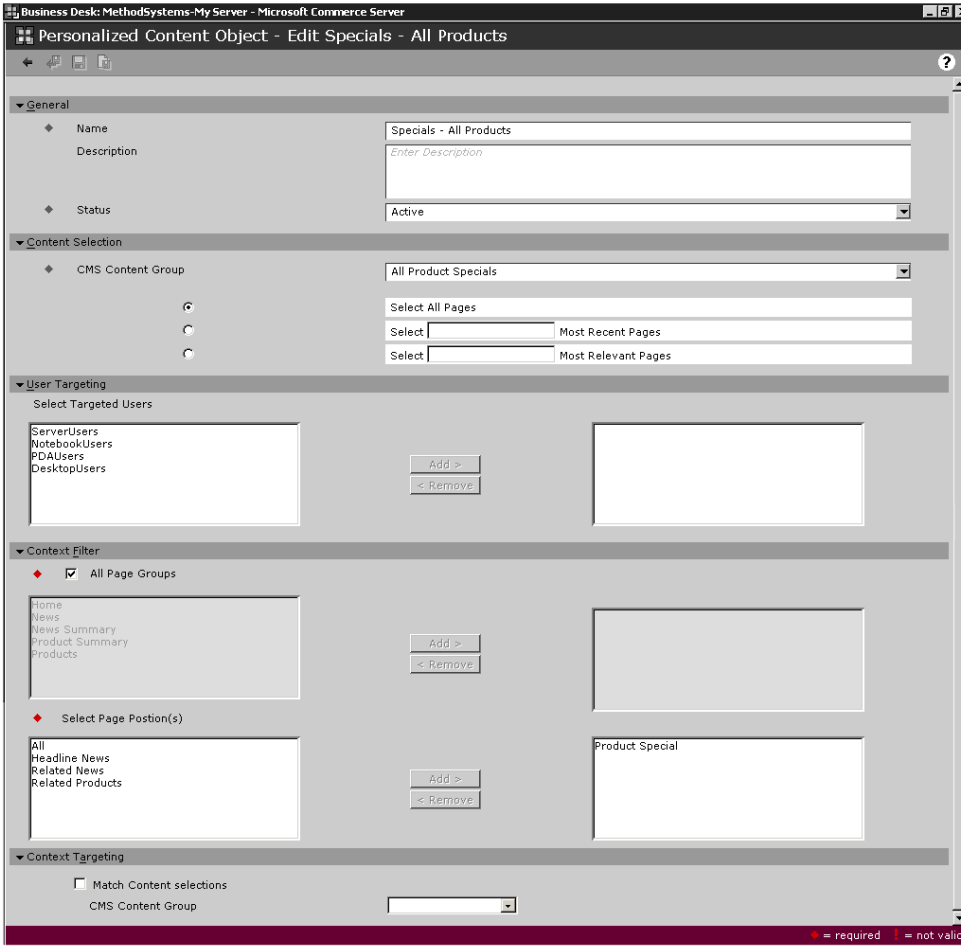
1 Open the Business Desk and expand the Targeting category. Click the **Personalized Content Objects** module.

2 Select Specials - All Products from the list of personalized content objects. Click **Edit.**

3 Notice the different sections.

- In the General section, the personalized content object is called “All Product Specials.” It is Active. (Only active personalized content objects are used by the personalized content object pipeline.)
- In the Content Selection section, the personalized content object uses the All Product Specials content group. This means only profiles specified by the All Product Specials content group are returned by this personalized content object. Also, the Select All Pages option is selected. This means, all the page profiles on the site that belong to the All Product Specials content group are returned by this personalized content object.
- In the User Targeting section no specific user target group is selected. This indicates that this personalized content object is independent of the current user’s profile.
- In the Context Filter section the All Page Groups check-box is selected, but only the Product Special page position has been specified. This means that any page in the site with a Product Special page position can activate this personalized content object.
- In the Context Targeting section nothing has been specified. This means that this personalized content object is active independent of the profile of the page currently being viewed.

- As a result of these selections, this personalized content object returns all Product Special page profiles whenever a Product Special page position is encountered, regardless of the current page or user.



Special - All Products personalized content object

4 Click **Back** (do not save any changes).

Chapter 4

Managing the Product Catalog

Overview

E-commerce engines like Commerce Server 2000 are built around transactional or structured content. For example, the price, weight, or size used in the transactional process to deliver goods to consumers must be kept in a database table or tables.

By using Content Connector you can determine how you want to set up your non-transactional content to match your catalog management. For example, you can include pictures, specification documents, and instructional videos to enhance your product by creating rich product pages. And with workflow, you can also make sure some level of approval has been reached before the product goes live on your site.

This chapter outlines how to create rich product pages and to set the mapping for rich product pages and simple product postings.

Understanding rich and simple product pages

A rich product page is a product page with an MSCMS 2001 page linked to it.

A simple product is a product with no MSCMS 2001 page linked to it. Every product without a rich product page automatically uses the designated simple product page. There is no approval process with simple product pages.

Options for your site

You have two options for how you want pages displayed on your site. You can have:

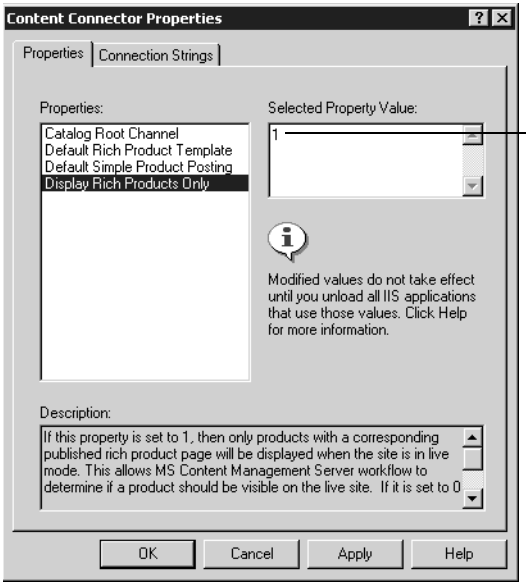
- Simple product pages (and rich product pages, if you choose to make them) visible on the live site.
- Simple product pages visible in edit mode only. You must perform workflow on these pages to make them rich product pages and therefore, visible on the live site.

To have your site display simple product pages on the live site:

1 Click **Start > Programs > Microsoft Commerce Server 2000 > Commerce Server Manager > Commerce Sites > Method Systems > Site Resources > Content Connector**.

2 Right-click **Content Connector**. Click **Properties**. The Content Connector Properties dialog box opens.

3 In the Properties tab, select Display Rich Products Only in the Properties area.



If you want both simple and rich product pages visible on the live site, change this number to 0.

4 Change the Selected Property Value to 1 or 0 to reflect the pages you want visible on the live site.

Option	Do this
Simple and rich product pages	Change the Property Value to 0.
Simple product pages in edit mode only (only rich product pages are visible on the site)	Change the Property Value to 1 (this is the default).

Customizing product mapping

With Content Connector you can make your products rich in content and make them participate in workflow and personalized content objects.

The Method Systems sample site provides examples of how the products in its catalog can be mapped to the corresponding rich pages. This section of the guide describes how this has been done in the sample site and how you can make changes to that.

For more information about mapping see Chapter 14, "Creating and Mapping Content Connector Containers" in the *MSCMS 2001 Site Administrator's Guide*.

Creating a product catalog

Commerce Server sites can have more than one catalog. Each catalog has its own set of products, its own product key for making sure each product is unique within the catalog, a set of categories, and other attributes.

Commerce Server catalogs can contain zero or more products. Products have required and optional properties that are defined using the Business Desk.

You can import existing catalogs or create new ones. Use the Catalogs module in the Business Desk to create a product catalog. For information on creating product catalogs see Commerce Server 2000 Help.

A Method Systems catalog already exists in the sample site, but new catalogs can be added.

Channels mapping in the sample site

The MSCMS 2001 Site Builder has a channel called Products. Each catalog in the sample site has a single channel assigned to it. When the Method Systems site is unpackaged a string property called RichProductChannel is created.

Mapping specifies where the product pages are stored. If you import a new catalog, create a channel using the Site Builder with the same name. For example:

```
/Channels/CS2000/Products/Catalog Name
```

or whatever path the rich product channel is set to.

You can also map categories to Content Management Server 2001 channels. For example, in Method Systems, the path for rich product pages about accessories is:

```
/Channels/CS2000/Products/Method Systems/Accessories.
```

Simple product page mapping

A simple product page uses query strings to indicate different simple products. The query strings are catalog name, category name, and product key.

The default path for a SimpleProductPosting about servers in the Method Systems site is:

```
/Channels/CS2000/Products/Product Detail
```

Specific categories can have their own simple product pages.

Rich template mapping

The template path assigns a template gallery or template for creation of rich product pages. If a template gallery is specified, the user will be asked to select a template under that gallery when they create a page.

The default path for RichProductTemplate in the Method Systems site is:

```
/Templates/CS2000/Authoring/Products/Rich Product.
```

Creating a rich product page

A rich product is a product with a rich page linked to it.

To add products and rich pages about products to your site you need to:

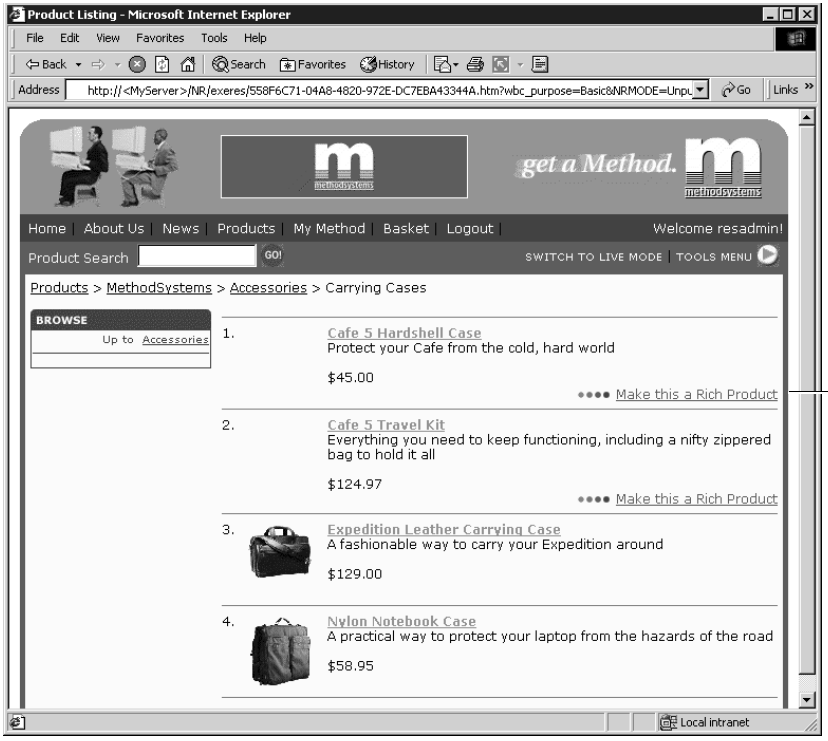
1 Create the product catalog.
2 Add the product to the catalog.
3 Create a product page from the Web Author or the Business Desk.

Creating a rich product page using the Web Author

You must have authoring rights to the channel where you want to create a rich page.

1 Open your browser and type the uniform resource locator (URL) for the Content Connector site: `http://<your server name>/<your site name>`.
2 In the Partner area, fill in your user name and password. Click **Login**. (For Method Systems, if this is the first time you're logging on, you will go directly to the MyMethod page where you can expand your user profile. Click **Home** on the header after you update your profile.)
3 From the header, click the link where your products are located, for example, on Method Systems, click **Products**.
4 From the header, click **switch to edit mode.** The Tools Menu appears.

5 Find the product you want to create a page for. (Simple products have a link that says "Make this a Rich Product.")



Simple products have a link that says "Make this a Rich Product."

6 Click **Make this a Rich Product**. A new page opens or the Template Gallery window opens if there is more than one template. (If the Template Gallery opens, choose a template and click **OK**.)

7 Add the text and any graphics you want to your page.

8 When you have finished, from the tools menu click **Save**. The Save New Page window opens.

9 The Name of the product and the Display name is filled in. Click **OK**.

10 From the tools menu click **Exit**. The new page, as it will appear on the live site, opens.

11 From the tools menu, click **Page Properties**. The Page Properties window opens.

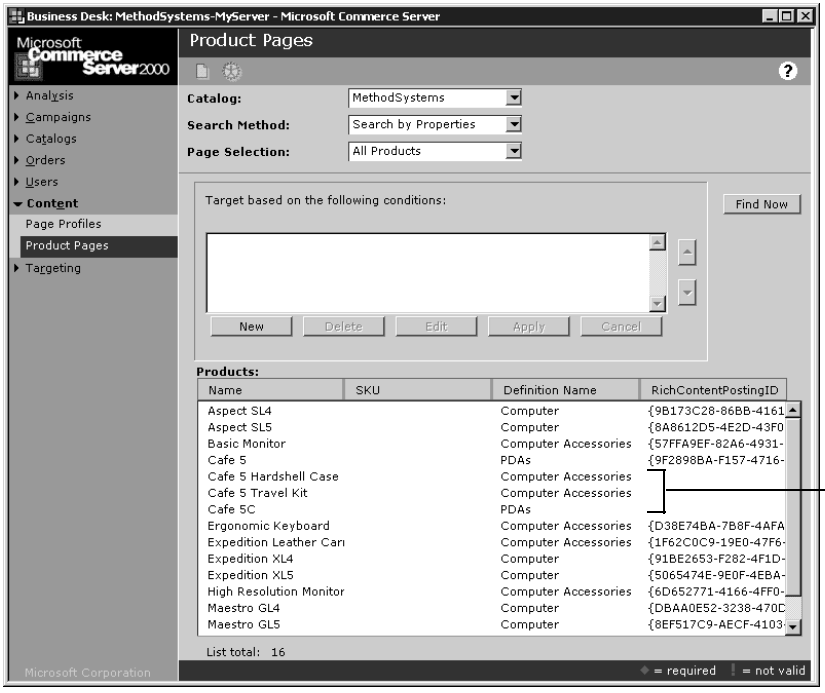
12 Fill out the appropriate tabs on the Standard tab, Page Profile tab, and Custom tab. Click **Save Changes**.

13 From the tools menu click **Submit**. Your page is now ready for approval.

Creating a rich product page using the Business Desk

You can also create a rich product page from the Product Pages module in the Business Desk.

1 Open the Business Desk and expand the Content category. Click the **Product Pages** module. Simple products do not have a Rich Content Posting ID.



2 To create a rich product page for a simple product click **New** from the toolbar. The Web Author opens.

3 Proceed with step 2 in the section, “Creating a rich product page using the Web Author” earlier in this chapter.

Finding rich product pages

Users can do a full-text or advanced search for all products in the Product Pages module in the Business Desk.

1 Open the Business Desk and expand the Content category. Select the **Product Page** module.

2 From the Product Pages window:

Use this	To do this
Catalog	Select the catalog you want to view.
Search Method	Select how you want to search for products: by properties, full text, or browse catalog.
Page Selection	Select the products to be displayed by selecting rich products, simple products, or all products.

3 Click **Find Now**.

If a product is defined as having product variant properties, then the product must have at least one variant listed in the Catalog Editor in order to be searchable.

Chapter 5

Content Connector User Authentication

Creating Content Connector user groups

Overview

You can set up various users to access different parts of your site. In the Method Systems sample site, the following users have been set up:

- Guests: These users have no Content Management Server 2001 user rights. They include:
  - non-registered guest users
  - registered guest users.
- Privileged users: These users have Content Management Server 2001 rights. They include:
  - Partners (OEM, Education, and Government users)
  - Content creators (authors and editors)
  - Administrators.

Content Connector guests

Guests do not have any MSCMS 2001 rights. They can only browse pages you make accessible to them.

Setting up guest user access

For guests to see your site, you must give them access using the Server Configuration Application and Site Builder. See the section "Enabling guest user access options" in Chapter 5, "Using the Server Configuration Application" in the *MSCMS 2001 Setup Guide,* and Chapter 3, "Setting up Publishing: Assigning Publishing Rights" in the *MSCMS 2001 Site Administrator's Guide*.

Non-registered guest users

Every non-registered guest user is given a basic automatic guest user profile, but in order for them to participate in personalization they must register.

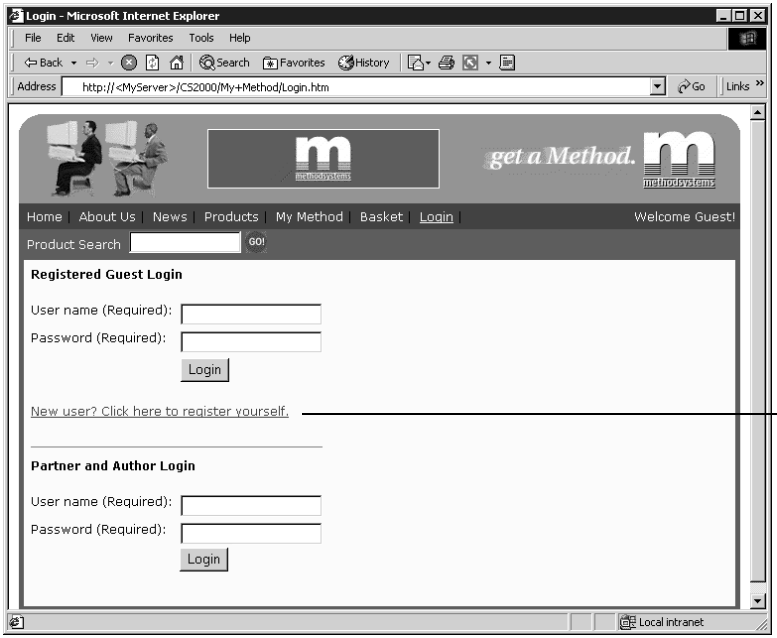
You can choose to set up your site so new users have to register immediately.

Registering guest users

Registered users are users who have created a Commerce Server profile. In the Method Systems site these users can create a profile by clicking the login portion of a site and registering.

1 From the header, click **Login**. The registration page opens.

2 New users must click the link, **New user? Click here to register yourself.**



A new user clicks the New User? link. A registered guest users fills in the appropriate fields.

Method Systems registration page

3 From the registration page, the user provides a user name and password and then clicks **Submit**. The My Method page opens.

4 The guest user can now participate in site personalization by filling out a user profile.



Creating guest users in the Business Desk

The business manager can also create these users in the Business Desk using the Users module.

1 Open the Business Desk and expand the Users category. Click the **Users** module.

2 Click **New User** from the toolbar. The New User window opens.

3 Fill out the appropriate fields and click **Save and Back**.

Content Connector privileged users

Privileged users have a Content Management Server 2001 identity. On the Method Systems site, privileged users are:

- Partners (OEM, Education, and Government users)
- Content contributors (authors, editors)
- Administrators.

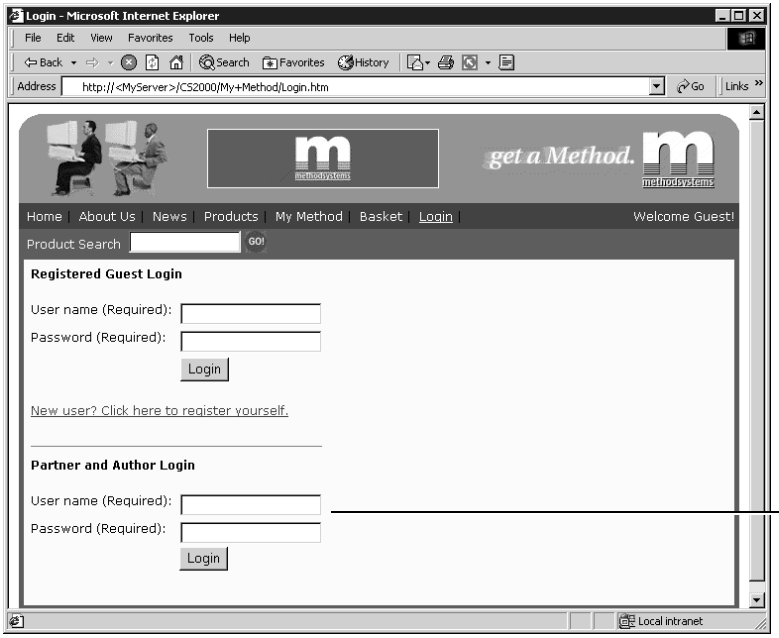
In the Method Systems solution site, partner users have privileged access to some news channels and placeholders within product pages. There are three kinds of partners in the solution site (OEM, Government, and Education). When a partner user logs on they are shown content that is specifically for them. This could include content that no other user sees.

Logging on to a Content Connector site as a privileged user

When you log on to the Method Systems site as a partner or author, you are logged on to both MSCMS 2001 and Commerce Server 2000.

1 Open your browser and type in the URL for Method Systems `http://<your server>/MethodSystems`.

2 From the header, click **Login**.The registration page opens.



Method Systems login window

3 In the Partner and Author section, fill out your user name and password (and domain, if the selection list is displayed) using your Windows 2000 or Active Directory user name and password. You are now logged on to Commerce Server Manager 2001 and Commerce Server 2000. To avoid accidently conflicting with other users, the characters **MSCMS_** are automatically attached to your generated profile name. No users with MSCMS_ can log on using the Registered Guest login.

A password is auto-generated as "********" (eight asterisks) for the generated Commerce Server profile, but users will never need to type that.

Setting the partner type in the Business Desk

When a partner user logs on to the site for the first time, a Commerce Server profile is automatically created, but the business manager must set their partner type.

Note

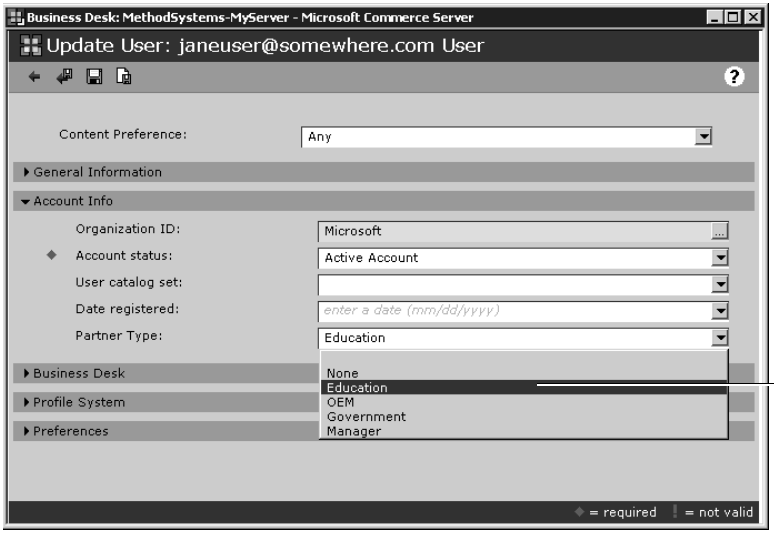
Before you can set the partner type for a privileged user, they must have logged on the site at least once. You can do this for them immediately after your site administrator creates the user in Active Directory or Windows 2000 and sets them up in Content Management Server 2001. (See the section "Setting up privileged users in Content Management Server 2001" in Chapter 13, "Managing Content Connector User Authentication" in the *MSCMS 2001 Site Administrator's Guide* for more information.)

Setting up privileged users in the Business Desk

1 From the Business Desk find a user profile.

2 Select **Open User** from the toolbar. The Update User window opens.

3 From the Account Info section, select the Partner Type from the drop-down list. Set the Partner Type as appropriate to your user. Set partners according to who they are and what you want them to see, for example, in the Method Systems site, they would be set as Education, OEM, or Government users. For content contributors and administrators, they would be set as Managers so they can see personalized content intended for any partner types.



User profile window

In the Method Systems Site a registered partner user set to Education, OEM, or Government receives content specific to them. A manager sees all the content.

Setting the partner and author login domain in the solution site

You have the option of making the domain name appear or not on the partner login portion of your site. This is set by a Boolean flag in Content Data in the Commerce Server Manager.



You can choose to have the domain visible or not on the login page of your site.

See your site administrator, if for security reasons, you do not want the domain visible on the site.

Appendix A

Content Connector Roles and Responsibilities

Responsibilities for customizing the sample site

Customizing the Method Systems site could involve several changes to the site data on the Business Desk and to the Content Management Server 2001 components that make up a Content Connector site. The table below outlines what components might change and who is responsible for changing them.

Component	Responsible for change	Use this to make change	For more information...
Site term	Business manager	Business Desk, User category	Commerce Server 2000 documentation
Extending user profile definition	Business manager with assistance from the site administrator	Business Desk, User category	Commerce Server 2000 documentation
Campaigns	Business manager in consultation with the site programmer	Business Desk, Campaigns category	Commerce Server 2000 documentation
Catalogs	Business manager	Business Desk, Catalogs category	Commerce Server 2000 documentation
Extending the MSCMS page profile definition	Business manager with assistance from the site administrator	Business Desk, Profile Designer module	*MSCMS 2001 Content Connector for Commerce Server 2000 Business Desk User's Guide*
Personalized content objects	Business manager in consultation with the site programmer	Business Desk, Personalized Content Object module	*MSCMS 2001 Content Connector for Commerce Server 2000 Business Desk User's Guide*
Profile SQL schemas	Site administrator in consultation with business manager	SQL Enterprise Manager	• Commerce Server 2000 documentation • *MSCMS 2001 Setup Guide*
MSCMS 2001 user groups	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001 Site Administrator's Guide*

Component	Responsible for change	Use this to make change	For more information...
MSCMS 2001 resources	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001 Site Administrator's Guide*
MSCMS 2001 channels	Site administrator in consultation with business manager and site programmer	MSCMS 2001 Site Builder	*MSCMS 2001 Site Administrator's Guide*
MSCMS 2001 templates	Site programmer in consultation with business manager	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Page Template Designer's Guide* • Method Systems sample site (which presents a Content Connector scenario)
Site navigation and structure	Site programmer in consultation with business manager	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Page Template Designer's Guide* • Method Systems sample site (which presents a Content Connector scenario)
Rich product pages	Content creators	• MSCMS 2001 Web Author • Business Desk, Page Profile module if they have rights	• *MSCMS 2001 Content Connector for Commerce Server 2000 Business Desk User's Guide* • *MSCMS 2001 Site Programmer's Guide*

Component	Responsible for change	Use this to make change	For more information...
Other MSCMS 2001 site content (for example, pages and resources)	Content creators	• MSCMS 2001 Site Builder • Method Systems sample solution site application files	• *MSCMS 2001 Content Connector for Commerce Server 2000 Business Desk User's Guide* • *MSCMS 2001 Site Programmer's Guide*

Glossary

Note that comprehensive glossaries of Microsoft terminology can be viewed at the following Web site: www.msdn.microsoft.com/siteguide/glossaries.asp.

A

Administrator, Content Management Server 2001

The Content Management Server 2001 (MSCMS 2001) administrator's job is to set up and manage publishing in the MSCMS 2001 environment. Administrators have full privileges (including the right to create, edit, and approve pages and postings) in all MSCMS 2001 containers.

Administrator, Windows 2000

A Windows 2000 administrator is a user with administrative rights on the computer where the MSCMS 2001 server and database are installed. It is typically the responsibility of the Windows 2000 administrator to install and configure Content Management Server 2001, and set up user accounts. The Windows 2000 administrator will not necessarily be the same person functioning as a Content Management Server 2001 administrator.

API – Application Programming Interface

In the same way that most applications will have a user interface (often a graphical one), many applications will also present an Application Programming Interface (API) with which other applications can interact. The API consists of the functions, messages, data structures, data types, and statements that programmers can use in creating applications that run under Windows 2000.

approve, approval

Publishing Content Management Server 2001 pages follows a two-part approval process. Pages are approved by editors for accuracy of content. Postings for the views of these pages are approved by moderators for relevancy to the channels to which they are posted.

(See also *auto-approve*.)

authentication page

A Web page you might need to pass through in order to log on to a Microsoft® Content Management Server 2001 site with a Web browser. On the authentication page, you will need to select a valid 2000 domain and enter your user name and password, or an LDAP (Lightweight Directory Access Protocol) Organizational Unit (OU).

author

Content Management Server 2001 authors create pages in folders, and submit postings in channels. The role of author is one of the formal roles in Content Management Server 2001.

(See also *role*.)

auto-approve

When an author submits a page to a folder that does not have an editor, Content Management Server 2001 automatically approves the page. Pages are also automatically approved when submitted by editors for the folder, or by administrators. Postings for approved pages are auto-approved (on an individual basis) if they are:

- created by an administrator, or created in a channel where the creator has moderator rights
- created in a channel where no moderator is configured.

(See also *approve, approval*.)

B

business manager, Content Connector

The business manager is responsible for creating page profiles, personalized content objects, and for managing rich content created for Web sites.

C

channel

In typical implementations of Content Management Server 2001, the channel structure forms the navigational architecture of the Web site and can be thought of as a site map. A channel is designed to control both how the browsing user navigates through the site and how these users are restricted from accessing various parts of the site, depending on their authorization level.

container

Virtual storage spaces (folders, channels, or galleries) used to organize pages, postings, resources, and templates. Pages are stored in folders; postings are stored in channels; resources and templates are stored in galleries.

content

Text, an image, or any embeddable item that can be used to fill the placeholders in a page.

content expressions

Content expressions are used in Content Connector. They are a combination of properties, Boolean and relational operators, and values that determine if a page profile is selected or not. Content expressions are combined to make content groups.

(See also *content groups*.)

content groups

Content groups are used in Content Connector. They are objects that define and score by relevance a set of page profiles that share some common properties. Personalized content objects specify one content group to define the set of page profiles to be returned by the personalized content object pipeline. Content groups are created by combining content expressions and scoring them.

(See also *content expressions*.)

D

default content

Default content is an image, or text, or a combination of images and text that a page template designer has added to a placeholder. This indicates to authors what type of content the placeholder should be filled with. For example, in a placeholder designated to display the title for a page, the page template designer might enter “Place title here” as the placeholder’s default content.

description

Descriptions should be entered in the Properties dialog box of each page, folder, channel, gallery, template, and resource. Descriptions are displayed in ToolTips and are valuable for providing quick but meaningful identification of these items and their intended uses.

E

editor

The main responsibilities of an editor are approving or declining pages based on accuracy and overall suitability, revising them as required, and managing pages in all folders where the editor has editing rights.

F

folder

The folder hierarchy is defined according to how an organization needs to control the authoring and editing process. A folder is a storage space (a container) where authors and editors store pages. If there are one or more editors configured for a folder, pages in that folder must be approved by one of those editors (or by an administrator) before they can continue through the publishing process. If there is no editor configured for a folder, Content Management Server 2001 auto-approves pages for that folder when authors submit them. Pages for administrators and for editors in folders that they edit, are always auto-approved.

G

gallery

A gallery is an MSCMS 2001 storage space (a container) for either templates or resources (such as images). Templates and resources are stored in separate galleries.

Guest User, Content Management Server 2001

If permissions for guest access have been set, Content Management Server 2001 uses this account for anonymous site visitors. Guest users must be granted rights to channels and postings, just like any other MSCMS 2001 subscriber.

I

IIS – Internet Information Server

Microsoft's Web server software that runs on the Windows 2000 platform.

M

Microsoft® Content Management Server 2001 system

A Microsoft Content Management Server 2001 (MSCMS 2001) system is the MSCMS 2001 server, all the MSCMS 2001 Site Builder and Web Authors that connect to the server, and the database. Content Management Server 2001 can also include multiple MSCMS 2001 servers doing different functions, such as development, staging, or production.

MSCMS 2001 page profile definition

The MSCMS 2001 page profile definition used in Content Connector specifies the set of properties and attributes in a page profile. The MSCSM 2001 page profile definition is managed

in the Profile Designer module in the Business Desk. This definition can be extended to include more properties.

(See also, *page profiles*.)

MSCMS 2001 window

The Content Management Server 2001 window contains the hierarchies of containers (folders, channels, and galleries) where authors, editors, moderators, resource managers, template designers, and administrators do their work. From this window, authors can open the Authoring window, and template designers can open the Template Design window.

O

object

Content Management Server 2001 data objects are maintained in the MSCMS 2001 database and can be manipulated by users. An object can be a container such as a folder, channel, gallery, or user role, or an object such as a page, posting, template, or rights group.

P

page

Pages in Content Management Server 2001 are created by adding content, such as text or images, to the placeholders on templates. The MSCMS 2001 pages are different from most Web pages in that different views can be generated from a single page and each view of the page can be posted to a different channel. Each view is the HTML page dynamically assembled and delivered when a subscriber selects an MSCMS 2001 posting. Because pages can use several views, each one based on a different template, the content of the views can be customized to suit different audiences.

(See *placeholder, view.*)

page groups

Page groups are used in Content Connector. Personalized content objects use page groups to target specific locations on a site. Page groups are defined in the Business Desk using the Reference Tables module.

(See *page positions, personalized content objects.*)

page positions

Page positions are used in Content Connector. They are identifiers defined in the Business Desk and used to provide additional context filtering when selecting content with personalized content objects.

page profile

Used in Content Connector, a page profile is a collection of properties describing a Content Management Server 2001 page. During personalization, page profiles are scored by content groups in order to determine what set of profiles belong to the group. There is one page profile definition for each site and it is defined in the Commerce Server Business Desk Profile Definition module for that site. Profiles of individual pages can be created and managed from either the MSCMS 2001 Web Author or the Commerce Server Business Desk.

(See also *content expressions, MSCMS 2001 page profile definition*.)

page template

Content Management Server 2001 page templates create a view of a page that includes one or more placeholders in a pre-configured layout. Authoring a page involves adding content (text, images) to the placeholders. When creating a page, an author can add more views to it. This way an author can quickly create different versions of the page to suit different audiences. Only template designers and administrators can create or make changes to templates.

(See also *navigation template, view, placeholder*.)

personalized content object (PCO)

Personalized content objects are used in Content Connector. They deliver collections of page profiles to Content Management Server 2001 pages. When a user requests a page that executes a personalized content object pipeline, information about the current user and the current context within the Web site are sent to the pipeline. Based on your targeting and filtering definitions, personalized content objects currently active in the Web site are evaluated to determine which ones are suitable for the current user in that particular context. The content from the personalized content objects is scored for relevance, blended, and returned to the page.

placeholder

Placeholders are ActiveX® controls or predefined areas of a view where you add content to create a page using Content Management Server 2001. Placeholders may contain default content, put there by template designers to show authors the type of content a placeholder accepts, or to suggest an appropriate use for the placeholder. The page template designer can put restrictions on placeholders for authoring.

(See also *default content, page template, view*.)

post, posting

A page must be posted to a channel in order for it to be published. A posting defines which view of a page is to be published and when to publish it. (Actual publication is subject to the Content Management Server 2001 approval process.)

"Posting" can also refer to the process by which a page is posted.

(See also *approve, view.*)

R

resource

A file that is added to a template or a page from somewhere other than a gallery. Once nothing is referencing it, it is deleted by background processing.

Resource Gallery

A container used within Content Management Server 2001 to organize and control access to resources.

Resource Gallery item

Any file that is stored within a Content Management Server 2001 resource gallery. To build a page, a user adds resources to placeholders in a view. Template designers can also create references to resources within a template's HTML code.

rich product page

Used in Content Connector, a rich product page is a Content Management Server 2001 page linked to a specific product in a Microsoft® Commerce Server 2000 catalog. It stores its rich HTML and multimedia content in MSCMS 2001 and displays it on the site along with the product properties from Commerce Server 2000.

(See also *simple product page.*)

rights

A Content Management Server 2001 user's rights are derived from their membership in one or more rights groups and the roles (subscriber, author, editor) they have in the containers (folders, channels, galleries) assigned to those rights groups. All containers you have rights in or rights to have colored icons.

- The rights group(s) you belong to determines which containers you have rights in.
- The role of the rights group(s) you belong to determines the types of tasks (create, modify, approve) you can do with items in a container.

(See also *rights group, role.*)

rights group

A rights group is a group of users assigned to one of the Content Management Server 2001 predefined roles. Members of a rights group hold privileges to containers, based on the role the rights group represents. Authors, for example, can create pages in a folder, while editors can both

create and approve pages in folders. Access to specific containers (folders, channels, galleries) is set for a rights groups by an MSCMS 2001 administrator.

(See also *rights, role.*)

role

In Content Management Server 2001, your role (subscriber, author, editor, moderator, template designer, administrator, resource manager) determines what actions you can carry out in containers. The different roles and the tasks allowed by those roles, are key components of the collaborative content management process.

(See also *rights*, *rights group*.)

S

server, MSCMS 2001

The MSCMS 2001 server is a machine that hosts the Microsoft Content Management Server 2001 software. This server is connected to an MSCMS 2001 database and interacts with MSCMS 2001 Site Builder or Web Author software.

simple product page

Used in Content Connector, a simple product page is a single MSCMS 2001 page for displaying product information for Commerce Server 2000 products. Products without a rich product page automatically use the designated simple product page. You have the option to make simple product pages visible on the live site or visible only in edit mode.

(See also, *rich product page.*)

Site Builder, MSCMS 2001

A client-side, WSIWYG (what-you-see-is-what-you-get) authoring environment that operates on a Windows 32-bit platform. The MSCMS 2001 Site Builder is used to develop pages and navigation templates, develop code with the API, and do site administration tasks. The MSCMS 2001 Web Author should be used for all authoring, editing, and moderating functions.

Site Deployment Manager

The Site Deployment Manager is an add-on product that allows objects such as resources, template, and galleries to be exported and imported from one MSCMS 2001 system to another. The most common application of site deployment is to move data from a development server to a production server. Site deployment can be done by a site administrator only.

site programmer (developer), Content Connector

The site programmer is responsible for creating and editing Content Management Server 2001 templates and solution site files for Content Connector sites.

Subscriber

Content Management Server 2001 subscribers have access through their Web browser to view MSCMS 2001 pages in the channels to which they're subscribed.

system administrator, Content Connector

The system administrator's job in Content Connector is to install Content Connector, customize and deploy the Method Systems sample site, and to create Content Management Server 2001 user groups, channels, and resource gallery.

T

template

Content Management Server 2001 uses two types of templates, page templates and navigation templates. Page templates create a view of a page that includes one or more placeholders in a pre-configured layout. Authoring a page involves adding content, for example text or images, to the placeholders. When creating a page, an author can add more views to it by applying different templates to it. In this way, an author can quickly create different versions of the page to suit different audiences.

Templates have no life-cycle and can be considered to be in either a checked-in (Saved) or checked-out (Approved) state.

Only template designers and administrators can create or make changes to MSCMS 2001 templates. Most references to templates in Content Management Server 2001 documents are to page templates.

(*See page template. See also navigation template, placeholder, view.*)

Template Gallery

A container used to control and manage access to templates.

template status

You can check the status of a template by looking at the status column next to its name in the Content Management Server 2001 window's list frame. The status indicates the availability of the template for use.

(See also *status*.)

ToolTip

ToolTips are the small, colored text boxes that appear when the cursor rests over buttons and other components of a program's user interface. In Content Management Server 2001, the ToolTip text usually states the name of the button. If filled in, the Description field of pages, folders, channels, galleries, templates, and resources also appear as ToolTips.

Web Author, MSCMS 2001

The MSCMS 2001 Web Author allows authors, editors, and moderators to create and approve pages from a Web browser. The MSCMS 2001 Web Author is a Web application that uses server-side and client-side scripting to generate an editable version of an existing or new posting.

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