Microsoft®
Content
Management
Server 2001

Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000

Tutorial

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Module 1

Getting Started

About the tutorial

This tutorial is for use with Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000. The various components are referred to in the tutorial as:

Component name	Short name
Microsoft® Content Management Server 2001	MSCMS 2001 Server
Microsoft® Content Management Server 2001 Content Connector for Commerce Server 2000	Content Connector
Microsoft® Content Management Server 2001 Site Builder	Site Builder
Microsoft® Content Management Server 2001 Web Author	Web Author
Commerce Server 2000	Commerce Server
Commerce Server Business Desk	Business Desk

This tutorial will guide you through steps to familiarize you with Content Connector through the installation, setup and targeting of an e-commerce site.

Please be aware that some of the tasks must be done in a specific order to achieve the desired results. This requirement will be noted in the tutorial.

Objectives

- To gain an understanding of Content Connector and how it integrates with Commerce Server.
- To learn how to target information on an e-commerce site for the best results.
- To create, enhance, and target Rich Product pages on the site.

Who should use this tutorial

The Microsoft Content Management Server 2001 Content Connector for Commerce Server 2000 tutorial is intended for use by system administrators and technical personnel who need to understand and evaluate the functionality of Content Connector for Commerce Server 2000.

It is strongly recommended that administrators and other technical personnel complete the MSCMS Tutorial before doing the MSCMS Content Connector Tutorial.

Prerequisites

This tutorial is intended for the Business Manager, who will be working on the Business Desk, and the Web Author. You should have:

- an understanding of Commerce Server functionality
- an understanding of Content Management Server.

It is recommended that you complete the MSCMS 2001 Tutorial to gain an understanding of:

- page template creation
- page creation
- channel creation
- publishing.

This Content Management Server functionality is used by Content Connector.

The data

The sample data used for this tutorial is that of a fictitious company called Method Systems.

The sample Commerce Server Business Desk is the Method Systems Business Desk. It will be referred to as the Business Desk. The catalog used in this tutorial is also called Method Systems. The sample web site is at http:// < servername > /CS2000. It is referred to as the Web Author.

An additional catalog—"Hardware" is available for import and is used in the *Product Pages* module. The *Product Pages* module contains the steps for importing a catalog.

Overview of topics

It is recommended that you work through this tutorial in the order in which it is presented. At a later time you can refer back to any module. The tutorial covers the following topics:

Business Desk User Setup

You will learn about the different user types, and how to set them up.

Content Connector

This module gives an introduction to Content Connector, its architecture and features. A discussion on how a product page is constructed. You will visit the site as different types of users who access the web site and see what is visible to these different users.

Commerce Server

This module starts with an introduction to the Business Desk and how it is used by Content Connector. You will learn what is involved in targeting an ad campaign.

You will create a Site Term, a User Profile, a Campaign Expression and a Target Group.

> *Note that the above procedures **must** be done before you create a Personalized Content Object. If they are not completed first, your PCOs will not give you the desired results.*

You will then target an ad campaign and test the results by logging into the Method Systems site as a Registered User. Finally you will learn how to edit a registered user's information from the Business Desk.

Page Profiling

In this module, Page profiling is defined, and compared with User profiling. You will learn how to create a Page Profile and its properties. You will then create a Content Management Server News page and give it a profile.

You will edit your work in both the Web Author and the Business Desk.

Personalized Content Objects (PCOs)

This module contains an explanation of PCOs, and a recap of the pieces you should have created—and will still need to create—in order to make an effective PCO.

You will prepare a Content Expression and a Content Group. You will learn about blending and scoring and how they come into play in setting up a Content Group. Also discussed are Context filtering and Page positions.

You will then create some PCOs using the data you have already set up in this tutorial. You will view the results by checking the content of a page in the Web Author.

Product Pages

This module looks at product pages—previously you were working with news pages.

You will import an existing .xml catalog and work from that catalog for the remainder of the module. You will use the Site Builder to create channels and folders for the new catalog. You will learn how to set up new templates and map them to the desired channels.

You will learn the differences between Simple and Rich product pages, then create some Rich Product pages. these pages will make use of the channel mapping you set up.

Finally you will learn how to access a page from the Business Desk and edit it.

Help available

- Product Documentation: located in User Documentation on the CD
- On-line help: http://www.microsoft.com/cmserver
- Commerce Server Help file: ..\Microsoft Commerce Server\Documentation\Commerce_Server.chm.

Module 2

Setting up

Software requirements

Full instructions for installing, unpackaging and setting up your Commerce Server site, are contained in the *MSCMS 2001 Setup Guide*. Site setup should be done by the site administrator.

Before you begin this tutorial, check that the following components have been installed:

- MSCMS 2001 server
- Commerce Server 2000
- Content Connector
- Content Connector sample site
- Commerce Serve Business Desk—can be installed anywhere on the network
- Site Builder. In order to complete some of the steps in the Product Pages module, you will need to have the Site Builder installed somewhere on the network.

The above components are contained in the MSCMS 2001 server CD.

- HTML editor. In order to create templates in the Product Pages module, you will need to have an HTML editor.

Also included on the CD is *hardwarefull.xml*. This is a sample catalog which will be imported and used in the Product Pages module of this tutorial. Before you begin that module, you must copy hardwarefull.xml from the CD onto your local C: drive.

You will find a Commerce Server help file in: ..Program Files\Microsoft Commerce Server\Documentation*Commerce_Server.chm*. You may wish to place a shortcut to this file on your desktop.

Requirements for using the MSCMS Content Connector Tutorial

Before beginning the MSCMS Content Connector Tutorial, ensure that the following applications are installed and functioning properly (See *Microsoft Content Management Server 2001 Setup Guide*):

1. Microsoft Content Management Server 2001 and MSCMS Site Builder are installed.
2. A Microsoft SQL Server database has been created and configured.
3. Commerce Server 2000 is installed.
4. **Note:** If you are going to complete the MSCMS Tutorial prior to doing the MSCMS Content Connector Tutorial, the MSCMS Sample Site data must be loaded into the database. If the MSCMS Sample Site is not installed, run the InstallShield Wizard to install it.

5. **Note:** You must have a clean MSCMS Sample Site in order to properly use the MSCMS Tutorial. If you will be using the MSCMS Tutorial for a second or subsequent time, you must restore the initial MSCMS Sample Site data prior to beginning the tutorial. You should remove the previous MSCMS Sample Site database and then create a new SQL database and reload the MSCMS Sample Site data.
6. MSCMS Content Connector for Commerce Server 2000 is installed.
7. The MSCMS Content Connector Sample Site is unpacked.
8. **Note:** You must have a clean MSCMS Content Connector Sample Site in order to properly use the MSCMS Content Connector Tutorial. If you are using the MSCMS Content Connector Tutorial for a second or subsequent time, you must restore the initial MSCMS Content Connector Sample Site data prior to beginning the tutorial. You should delete the previous MSCMS Content Connector Sample Site data and then unpack and reload the MSCMS Content Connector Sample Site data.
9. In order to use the MSCMS Content Connector Tutorial, you must have Administrator privileges to access Content Management Server, Commerce Server 2000, and Content Connector. As an administrator, you will be able to set up the users and roles needed to complete this tutorial.

We suggest you print a copy of the *MSCMS Content Connector Tutorial* PDF file in order to work through the tutorial.

User requirements at setup

Some users need to be set up when the installation is complete. This must be done by the NT Administrator.

The Method Systems Business Desk installs with the following users:

- administrator
- janeuser@somewhere...
- joeuser@somewhere...
- guest

Active Directory Service users:

Content Management Server users must exist as Active Directory Service (ADS) users before they are added to MSCMS 2001 server through the Site Builder.

Create the following users in ADS:

- *author1*
- *editor1*
- *oemuser1*
- *manager*
- one *guest* subscriber.

If you do not have Active Directory administrator rights to create these users, you can designate five existing ADS users to these roles.

The Method Systems sample site comes with the following user groups—and their rights—already set up with the Site Builder:

- CS2000 Guest
- CS2000 Authors
- CS2000 Editors
- CS2000 OEM Partners

You will be adding the ADS users you just created to these groups. For learning purposes, it is recommended that you set *all* user passwords to **password.**

MSCMS 2001 server Users

In the Server Configuration Application (SCA):

1. Run the SCA, which is in Programs > Microsoft Content Management Server
2. Click the **Security** tag, then the **Configure** button.
3. Set "Allow Guests on Site" to **Yes**. In "Guest Login Account", select the Guest you created in ADS.
4. Click **OK**, then close the SCA.

In the Site Builder

1. Open the Site Builder, which is in Programs > Microsoft Content Management Server
2. Click on **User Roles**, then **Administrator** in the "User roles" pane.
3. Add *Manager* to this group.
4. Click on **Subscribers** in the "User roles" pane.
5. Add the Guest user to the CS2000 Guest group which grants access to the default parts of the site—that is, rights to everything in CS2000 except Education, Government and OEM news channels.

Users who do not provide any credentials to the site will automatically be logged in as this Guest user.

6. Add *author1*, *editor1*, and *oemuser1* to their appropriate CS2000 groups.

Here is a summary of the user roles and the rights groups to which they should belong:

.

User Roles	Rights Groups	AD user to assign
Subscribers	CS2000 OEM Partners	OEMUser1
	CS2000 Education Partners	—
	CS2000 Government Partners	—
Authors	CS2000 Authors	Author1
Editors	CS2000 Editors	Editor1
Administrators	Administrator	Manager

In the Web Author

1. Open Internet Explorer and type in the sample site URL:

   http:// < your server name > /CS2000.

2. Click **Login**.
3. In the **Partner and Author Login** area, log in as each one of these users.

   It is important to complete this step so that each user is assigned a profile by Commerce Server, and each will then be present in the Business Desk.

In the Business Desk

1. Open the Business Desk
2. Expand Users, Users
3. Display a list of users
4. Set each user's "Partner Type"—located in the Account Info category of the User Update window:
   - OEM users should be "OEM"
   - Administrators, Authors and editors should be "Manager"

For further information on setting up users, refer to the *MSCMS 2001 Setup Guide*.

Module 3

Content Connector

Content Connector overview

On completion, you will understand:

- how Content Connector integrates with Commerce Server
- the basics of the Content Connector features
- the difference between a Simple Product page and a Rich Product page
- the different user types
- logging in to the Web Author.

Introduction to Content Connector

Commerce Server is used to build and maintain an e-commerce site.

- *Commerce Server* manages the transactional services of an e-commerce site, such as orders, shipping, inventory management and reports.
- *Content Connector* manages the content of that site, its design and appearance.

Content Connector and Content Management Server integrate with Commerce Server to allow site managers to personalize a site by targeting content to be shown to specific users on specific pages. Content Management Server also provides the ability to edit, enrich and preview product pages, and to publish news releases or other content pages. These different pages can be targeted to specific users.

This integration takes the form of Content Connector "add-ons"—for example, extra Business Desk modules, Content Management Server page templates, extensions to the Web Author, and include files. These Content Connector add-ons make use of Commerce Server objects.

By allowing site managers and developers to personalize the site, Content Connector can tailor information to be viewed by a Registered user or Pre-registered user. This targeting is done by the Commerce Server targeting system, which is also called the **content selection framework**.

The targeting system

The targeting system is a Content Connector add-on and is an extension of Commerce Server's **c**ontent selection framework.

User Profiles, Content Profiles and Context are combined in Personalized Content Objects (PCOs). These PCOs are then filtered through the targeting system—which is based on a pipeline concept. Context, Users and Content are filtered through the pipeline until only matching PCOs are left. Thus, the user is served with exactly the right information.

Log files

Content Connector also keeps a log of user activities to assist in the tuning of the site for better personalization. From the log, reports are created tracking what visitors to the site are looking at. This enables the adjustment of content and context profiling accordingly.

Integrating Content Connector with Commerce Server

Content Management Server adds web content management to Commerce Server by adding custom categories and modules to the Business Desk, by way of Content Connector, as shown below:

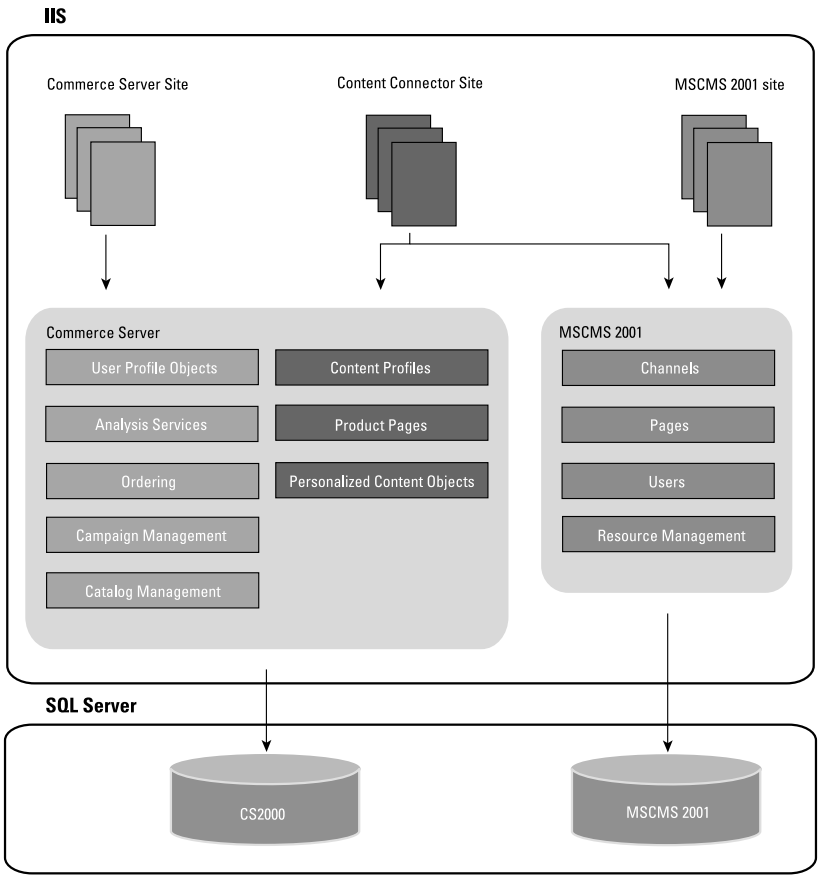
Content Connector add-ons



The Content Connector add-on categories are “Content” and “Targeting”, and are expanded in this graphic.

Content Connector architecture

The following graphic depicts how Commerce Server, Content Connector and Content Management Server integrate.



In this diagram, the three Content Connector modules are “Content Profiles”, “Product Pages” and “PCOs”. In addition to working with these three modules, Content Connector also makes use of the Commerce Server “User Profile Objects”, “Catalog Management”, and “Campaign Management” modules.

User types

Commerce Server allows different user types to access the web site with different priveleges. In addition, Content Connector takes advantage of the capabilities of Content Management Server users. Let's look at the five types of user, their roles, and their rights.

The first three user types are from the public or from other companies—site visitors. The last two are from within the organization.

Five user types:

- Browsers:
  - Anonymous—also called Guest
  - Registered
  - Pre-registered
- Content creators:
  - Manager
  - Content Management Server users.

Guest user

An Anonymous or Guest user is anyone who visits the site without logging in. This user can purchase items, but cannot indicate preferences on the site.

Some information on the site will not be visible to a Guest user.

Registered user

A Registered user is offered a selection of content preferences on the "My Method" page. The selected preferences are saved in a User Profile for that user, and will be reflected on the home page after login.

To become a Registered user, a Guest user completes a User Profile to indicate viewing preferences on the site. This is called User profiling. For example, on the Method Systems site, a user can choose to receive technical, business or general content information when visiting the Method Systems site.



Note
All users who have registered on the Method Systems site can access their own User Profile at any time by clicking on the **My Method** link in the navigation area.

The steps to add and edit a user from the Business Desk are included in the *User Profiling* module.

Pre-registered user

A Pre-registered user can be defined as a user who is known to the company and to whom the company wishes to give special privileges. Examples of users who could fall into this category are employees, partner companies and major customers.

The Pre-registered user has all the capabilities of a Registered user and, in addition, has special viewing privileges on the site. This user can see content which is not visible to other users.

For example, a major bulk purchaser of camping equipment could receive advance information on an upcoming bulk sale of sleeping bags.

A Pre-registered user must be set up from the Business Desk by the Business Manager. However, once created, the User Profile can be edited on the Web Author by that user.

Business Manager user

The Business Manager can see all targeted information, edit parts of the site and approve changes and additions.

The Business Manager:

- can set up profiling to allow for cross-referencing of content on the site
- can create, preview, edit and publish product catalog information directly through Content Management Server
- can create non-commercial and product pages targeted to specific site visitors
- will most likely have *administrator* login rights on the Web Author.

Authoring users

In addition to the above users, Content Connector utilizes some Content Management Server user roles. Content Management Server users give Content Connector the same functionality and control over pages on the site as there is when using Content Management Server to manage pages.

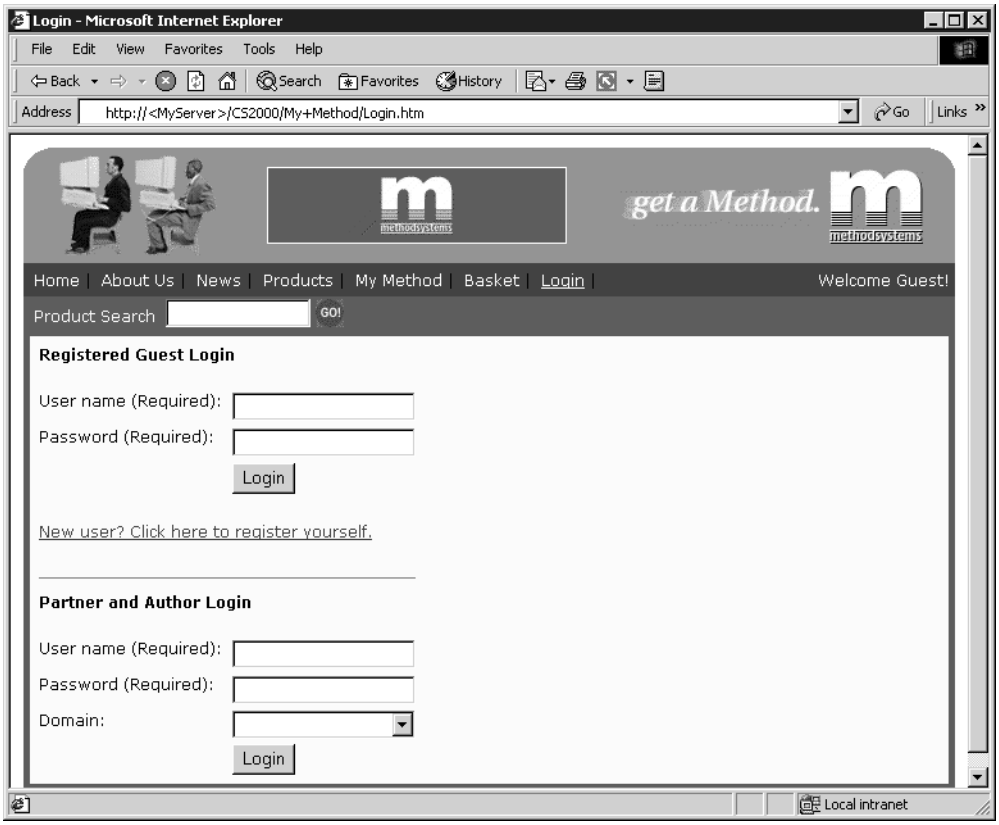
To work on the site content through the Web Author, a user must log in as a Content Management Server user. For example, to create a Content Management Server Rich Product page, the user will log in as an *author*. An *editor* approves and publishes pages, while an *administrator* manages the Content Management Server users.

For information on the setup and maintenance of these Content Management Server users, refer to the *Microsoft Content Management Server 2001 Site Administrator's Guide*.

Content Management Server subscribers

The Content Management Server Subscriber Group contains Subscriber users who have viewing rights to Content Management Server channels. These users are automatically given Commerce Server user profiles when they log in. However, they will retain their original Subscriber rights in Content Management Server.

Web Author login screen



You can see that there are two login areas. The first login area is for Registered users and Guest users.

The Partner login area is to be used by those who have authoring or special viewing rights to the site—in other words, Content Management Server users and Pre-registered users.

What the user sees on the site

As you work through this module, notice what is visible on the sample site as a result of logging in as each user type and thus having specific viewing rights. These user rights are set up in the Business Desk in the Partner type field—for example, "OEM", "Government", "Education" and so on. This is separate from targeting based on User Profile. The content visible to that particular user is described.

Visiting as a Guest user

1. Open Internet Explorer and type in the site URL:

   http:// < your server name > /CS2000.

2. When the site opens, scroll down to find the article "Resources for Mobile Computing". Click on it. The full article appears.

   Notice that it is in News > General News.

   At the bottom of the page there are some related news links. These links are there because the author of the article "Resources for Mobile Computing" specified certain product types related to that article, so that links are automatically inserted on the page.

3. Click the **Expedition XL4** link. You are now in the product part of the site.

   Notice that this product page also contains headlines of articles about similar products. It knows that site viewers interested in Expedition XL4 product information are probably interested in news about similar products as well.

4. Try to find the "*Cafe 5 Personal Digital Assistant*" article using each of the following navigational methods:

   - Type ***Cafe*** in the search field and click **Go.**
   - Click the **Cafe 5** link in the search results.

   Notice that the Cafe 5 article is in Products > MethodSystems > PDAs.

   - Click the **Products** link to return to the products page.
   - In the Browse window, click **MethodSystems**, then the **PDAs** link.
   - Click the **Cafe 5** link in the search results.
   - You will see the Cafe 5 article again.

5. Click **Home** in the navigation area to return to the home page.

Registering as a user

Now you can create your own Registered user IDs, using the Web Author. Remember to use the password "password" for everything.

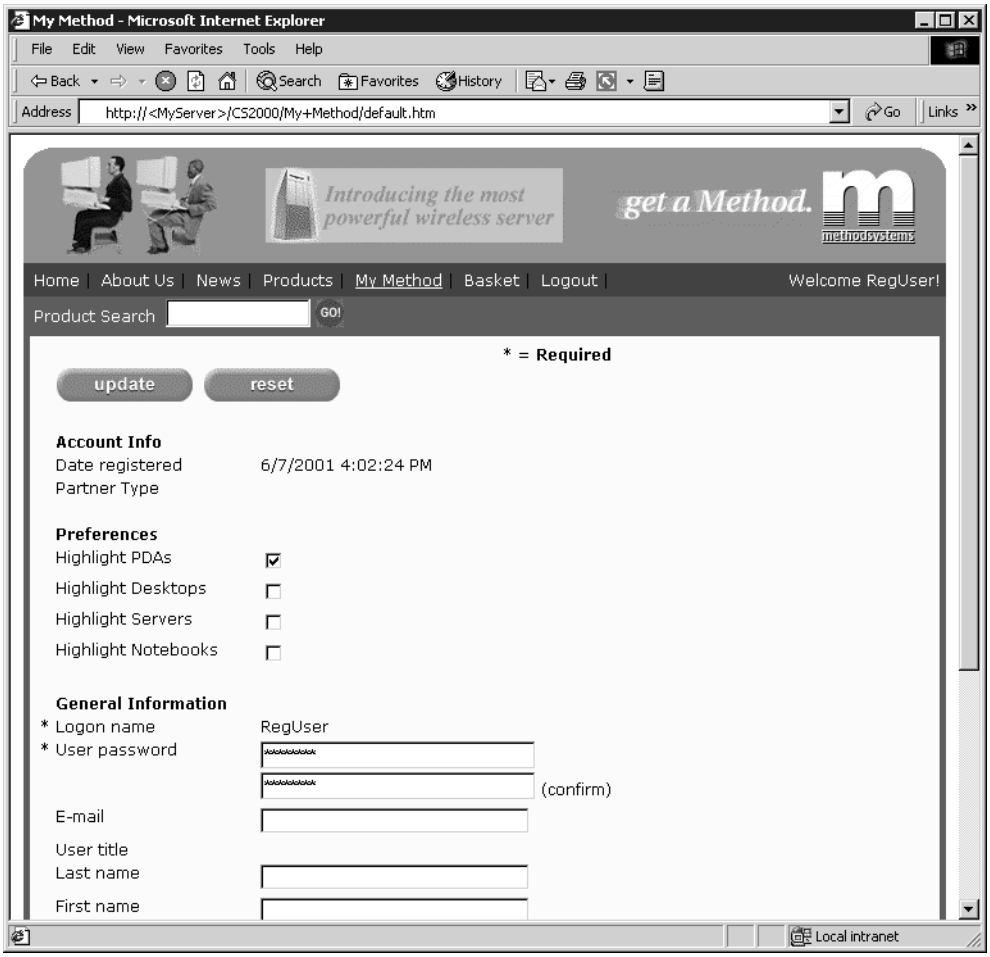
Adding a Registered user in Web Author

1. From the navigation area, click the **Login** link.
2. Click the **New User? Click here to register yourself** link. A registration screen opens.
3. In Username type ***RegUser***.
4. In the password box type ***password***. Confirm the password and click **Submit**.

   The My Method page opens.
5. To enter specific User information:
   - from the "Preferences" list, check "Highlight PDAs"
   - Click **Update**.

   The My Method screen should look like this—notice "Welcome RegUser":

User information



6. Click **Home**, then click **Logout**.

To see that this new user is now present in the Business Desk, go to Users > Users and list all users.

Note
The My Method page contains your User Profile information and can be updated at any time. For example, you may wish to add another area of interest, or remove one.

Pre-registered user IDs must be set up by the Business Manager before the user logs in for the first time. These users have rights to see content that other users cannot.

Logging in as Pre-registered user

1. From the navigation area, click the **Login** link.
2. In the Partner login area:
   - Type ***oemuser1*** in "User name"
   - Type ***password*** in "Password". Click **Submit**.
3. Click the **Products** link.
4. Click the **Expedition XL5** hyperlink to navigate to the product special.
5. Scroll down to "Product News". Notice that extra content appears specifically for the OEM Pre-registered user. Notice also the extra news articles.
6. If you cannot see an item directed to the OEM users:
   - check in the Business Desk that *oemuser1* has Partner type set to OEM
   - if this needs changing, be sure to Publish Profiles.
7. From the navigation area click **Logout**.

Logging in as Manager User

1. From the navigation area, click the **Login** link.
2. In the "Partner User login" area:
   - type ***manager*** in "User name"
   - type ***password*** in "Password"
   - click **Submit**.
3. Click the **Products** link.
4. Click the **Expedition XL5** hyperlink to navigate to the product special.
5. Scroll down to "Product News". As Business Manager you can see extra content for the three different user partner types (Government, Education and OEM).
6. If you cannot see all this content:
   - check in the Business Desk that *manager* has Partner type set to OEM

7. From the navigation area click **Logout**.

Note
You will learn how to change these product pages, and how to add targeted content later in the tutorial.

Module 4

Commerce Server

Commerce Server overview

On completion, you will understand:

- the Business Desk layout
- the steps and elements required to create and target an advertising campaign
- the Commerce Server elements contribute towards Personalized Content Objects.

This is a review of those Commerce Server features. You should have some understanding of Commerce Server prior to starting this tutorial.

Steps in this module are pure Commerce Server. However, you will see later on how the data you create will be used by Content Connector.

The Business Desk

Business desk welcome screen



This graphic shows the navigation pane on the left, and the content pane on the right.

The two categories—"Content" and "Targeting"—contain the Content Connector add-ons that are the focus of this tutorial.

Commerce Server categories referenced by Content Connector

Campaigns

- Campaign Manager
- Campaign Expressions
- Target Group
- Reference Tables > Page Groups.

Catalogs

- Catalog Designer
- Catalog Editor.

Users

- Users
- Profile Designer
- Site Terms Editor.

The Campaigns category

This category is used for the creation of advertising, direct mail or discount campaigns.

Use "Campaign Manager" to enter the name of the campaign, the product and the target audience. You will be setting up the target in a later step.

"Campaign Expression" allows you to create a name for the proposed target of the campaign—a Campaign Expression—and to include a description of the product in that Campaign Expression. For example if you want to target "*Product Interest - Notebook*" the description could be "*Notebook product interest is true*".

Create target groups in the "Target Group" window. For example the Target Group name could be "*Product Interest - Notebook*", or "*Prod Notebook Group*". You will also add a Target Group expression,or query. For example, you can specify that you want this campaign page to be shown only to those users who indicated an interest in *Notebooks* when they registered.

Navigate to **Campaigns > Reference Tables** to select an existing page group or define a new page group to which this advertisement will belong.

Page groups supply context into the pipeline.

As a Commerce Server review, it is recommended that you do the *Business-to-Consumer* tutorial "*Create an Ad Campaign*". This is available on the Method Systems Business Desk when it is first opened.

Checklist of required elements in the creation of a new ad

Customer

- customer name
- type
- industry

Campaign item

- campaign name
- start/end dates
- status

Goals

- set goals
- set scheduling

Create advertisement item properties

- advertisement name
- status

- type
- requests
- exposure limit
- industry

Display information

- set size

- type

Campaign Expression

- expression name

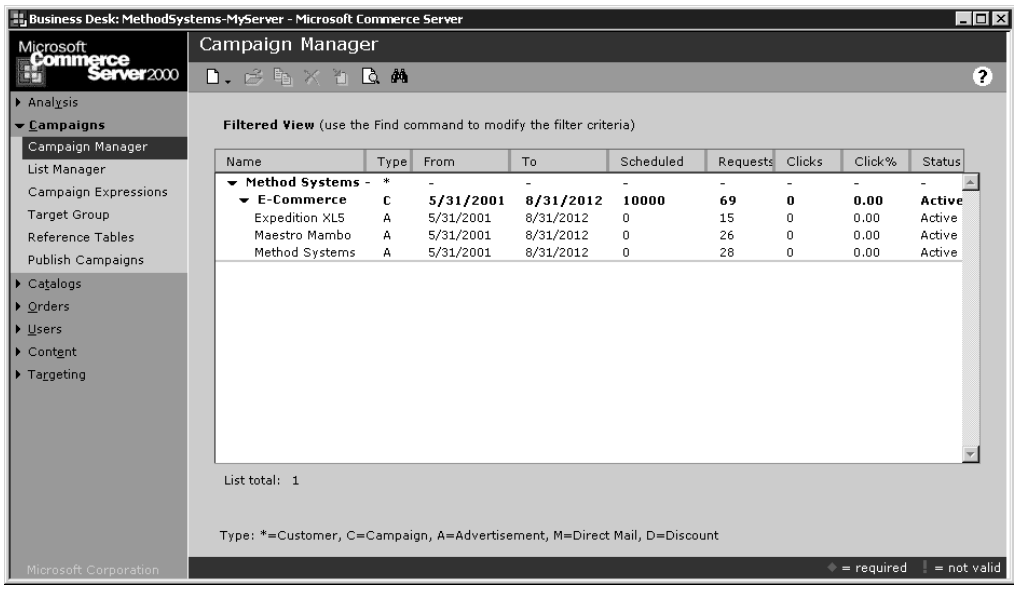
Target Group

- group name.

Targeting an advertising campaign

In the installed site, there are three sample advertisements. Currently these can be viewed by all users. They are listed in Campaigns > Campaign Manager, as seen here:

The Campaign Manager



In the following procedures you will target two of these campaign items to specific users. You will target the advertisement “Expedition XL5” to Business Readers, and “Maestro Mambo” to Technical Readers.

Before you can do this, however, you must do some preparation for targeting the ad.

To target an advertisement you must:

- create one Site Term for Content Focus
- add the Content Preference property to the User Profile Definition
- create three Campaign Expressions, one each for:
  - Business Readers
  - Technical Readers
  - All Readers

- create three Target Groups for:
  - Business Reader Group
  - Technical Reader Group
  - General Readers Group.

Once you have completed these steps you can target two of the advertising campaigns on the sample Business Desk.

Finally you will create a new Registered user and set the preference to “Business”. You will then be able to check that you can see the relevant advertising campaign on the relevant page.

Site Terms

The “Site Term Editor” in the “Users” category is used to create and manage Site Terms.

A Site Term can be thought of as a central repository for choices. When creating a new Site Term, you define a list of desired values. These values appear as a list of choices to the site visitor and limit their choices to the defined list.

In this way, it becomes easy to target users who have similar interests.

Now you will create a new Site Term called Content Focus, with three options for a Registered user to select from: “Technical”, “Business” and “Any”. These will appear on the Web Author as a drop-down list selection.

Creating a Site Term

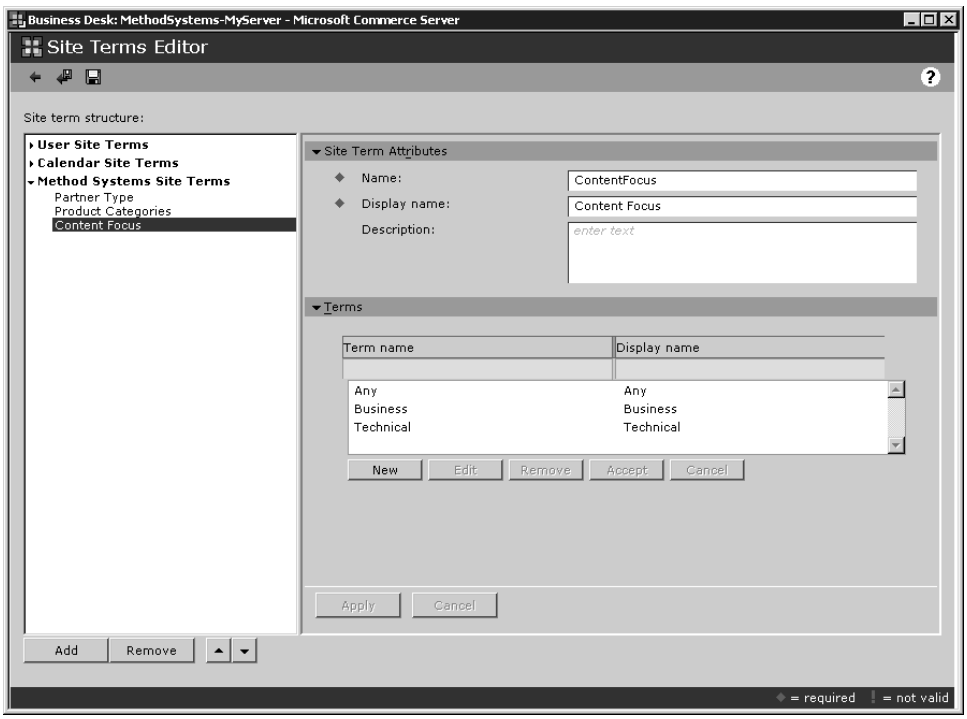
1. Start up the Business Desk from your desktop. It may take a few moments to load.
2. Expand “Users” and click **Site Terms Editor**.
3. In the “Site Term Structure” pane expand “Method System Site Terms” and highlight it.
4. Click **Add** at the bottom of the pane. The Add dialog box appears.
5. Select **Add a New Site Term**. Click **OK**.

> Tip
> Check that “New Site Term 1” appears in the “Site Term structure” pane at the same level as the existing Site Terms, and not the same level as “Method System Site Terms”. If it is at the wrong level, simply select the item and click the Up or Down arrow at the bottom of the pane to reposition it.

6. Complete the “Site Term Attributes” category with the following:
   - type ***ContentFocus*** in Name
   - type ***Content Focus*** in Display Name.
7. In the “Terms” category click **New** and enter the following three term names:
   - type ***Technical*** in Term Name
   - type ***Technical*** in Display Name
   - click **Accept**, then click **New**
   - type ***Business*** in Term Name
   - type ***Business*** in Display Name, click **Accept**, then **New**
   - type ***Any*** in Term Name
   - type ***Any*** in Display Name and click **Accept**.

8. Click **Apply** at the bottom of the window to create the Site Term.
9. Notice that "New Site Term 1" is renamed "Content Focus" in the Method System Site Terms group. The completed data should look like this:

Completed content focus



10. Click **Save and Close** on the toolbar to return to the main Business Desk. Do not close the Business Desk.

    The Site Term "Content Focus" is now available to be used. You will next extend the User Profile Definition to add a new property.

For more details on this Commerce Server feature, refer to *Site Terms* in the *Commerce_Server.chm* file.

User Profiles

User Profiles are based on a single User Profile Definition. A User Profile Definition is a set of properties that define a user. The Business Manager manages these through **Users > Profile Designer** on the Business Desk

User Profile Definitions

User Profile Definitions can be extended to include additional properties.

For example, a User Profile Definition may contain “Name”, “Location”, “Income”, “Likes Servers”, “Likes Desktops”. This could be extended to add “Likes PDAs”.

The Business Manager creates ***multiple*** profiles based on the ***single*** profile definition. Here is an example of a User Profile Definition and two User Profiles based upon it:

Definition properties	John’s Profile	Mary’s Profile
Name	John Goldsmith	Mary Peterson
likes servers	.T.	.T.
likes Desktop	.F.	.T.
likes PDAs	.F.	.T.
likes Notebooks	.F.	.T.

You can see that John prefers to see information about Servers, while Mary is interested in all products.

If no preferences are checked, the profile will target all content equally.

Note

You can delete profile properties, but if you delete any of the properties provided with the sample site, without changing PCOs and other aspects, you may break the site, or cause it to behave strangely. The following profile properties are **crucial** and should *not* be deleted:

- PostingID
- Name
- CatalogName
- StartDate
- ExpiryDate
- HighPriority
- IsProduct
- ProductKey.

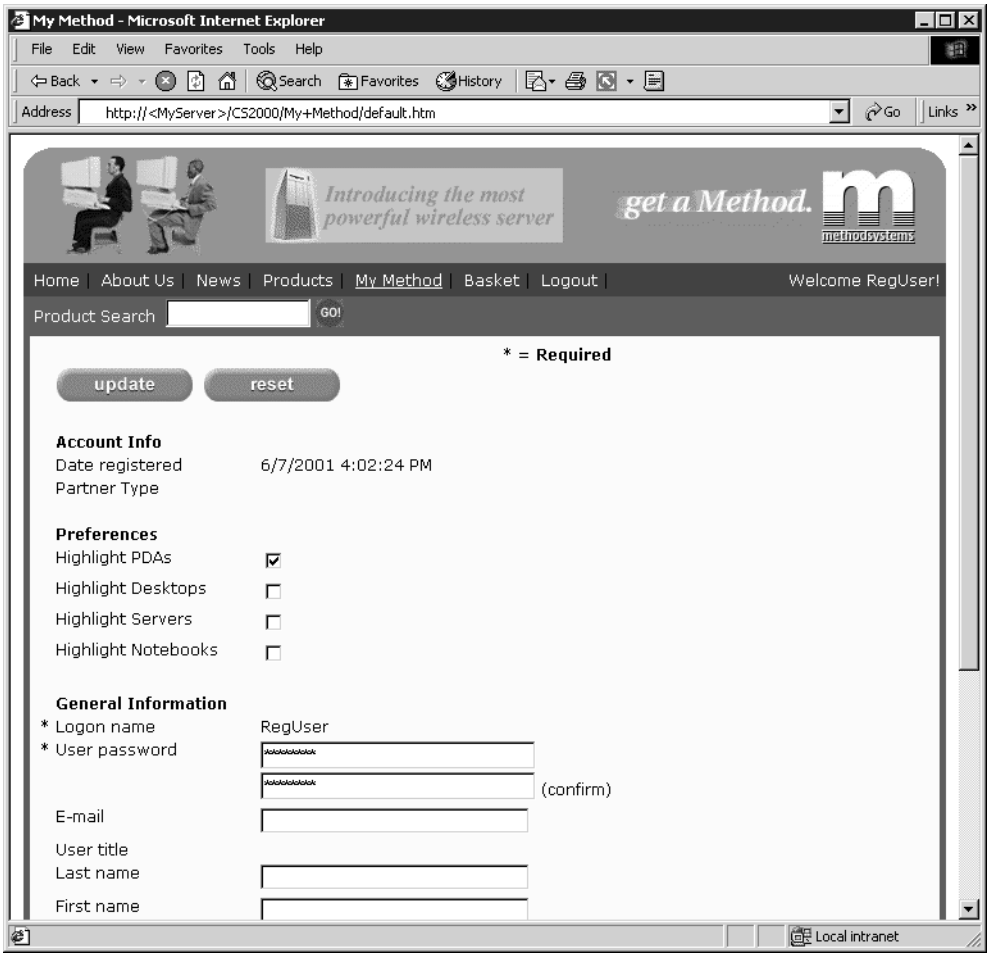
Each User Profile Definition property has a list of attributes. To add another property to a User Profile Definition, you would extend the User Profile using the Profile Designer.

The Profile Designer is used to create, edit and manage Profile Definitions. For example, a User Profile Definition may be set up to collect user data such as Name, Login ID, Income.

Next, you will extend the User Profile Definition properties by adding a new property called **ContentPreference**. This will make use of the Site Term **ContentFocus** you just created.

Before you begin, take a moment to start up the Method Systems web site and look at the My Method page. This is the page that contains information about a Registered user. Notice there—and in the following graphic—that the preferences are displaying for products only:

My Method page before extending User Profile Definition



Adding a new User Profile Property

1. On the main Business Desk navigate to **Users > Profile Designer**.
2. From the "Profiles" window select **User Object** and click **View** on the toolbar. The "User Object" window opens.
3. In the "Properties" pane expand "Preferences" and click **Add**.
4. Select the **Add a new property** radio button. Click **OK**.

5. In the Attributes category:
   - type ***ContentPreference*** in Name
   - type ***Content Preference*** in Display Name
   - in the "Type" drop-down menu select **Site Term**
   - in the "Type reference" drop-down menu select **Method Systems Site Terms > ContentFocus**. Click **OK**.
6. Expand "Advanced Attributes" and:
   - Make sure **Active** is set to **Yes**—the default
   - in the "Map to Data" field, click **Browse**
   - select **Profile_service_SQLSource > UserObject > u_ContentFocusPref(STRING)** and click **OK**.
7. Expand "Custom Attributes" and:
   - select **sDelegatedAdminAccess** and click **Edit**. Change the value to **2** and click **Accept**
   - select **sFeatureID**. Make sure the value is set to **0**
   - select **sUserAccess** and click **Edit**. Change the value to **2.**

Note
The custom attributes are Commerce Server attributes. For more information refer to *Custom Attributes* in the *Commerce_Server.chm* file. You can control access to these properties with these settings:

- **sUserAccess** specifies registered user access to the property in the Customer Service.
  0 = hide from registered users; 1 = Read only; 2 = editable.
- **sDelegatedAdminAccess** specifies delegated administrator access to the property in the Customer Service and the Partner Service.
  0 = hide from administrators; 1 = Read only, 2 = editable.
- **sFeatureID** specifies the site scenarios for which the property is displayed in the Customer Service and the Partner Service.
  0 = always display; 2 = display only when the site supports the Delegated Admin options; 3 = display only when the site uses Active Directory.
  Note that Commerce Server does not indicate a '1' setting for this property.

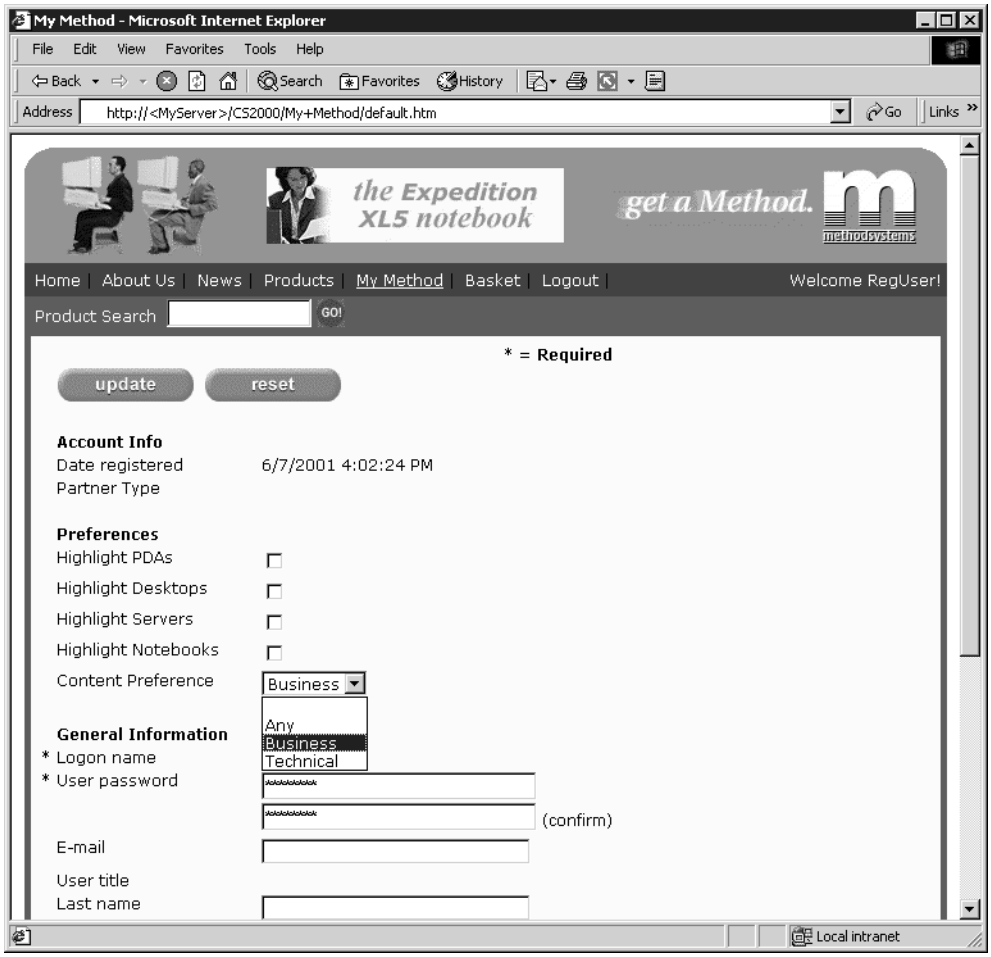
8. Click **Accept**.
9. Click **Apply** to create the new User Profile attribute.
10. Click **Save and Close** on the toolbar to save your work and return to the Business Desk.
11. In "Users", select **Publish Profiles**.
12. Highlight **Method Systems.**

13. Click **Publish Changes to Production** on the toolbar. This will update all your changes and may take a few seconds.
14. Return to the Method Systems web site and look at the My Method page again.

    The result is that now you can see the addition of "Content Preference", with a drop down selection.

    This is illustrated in the following graphic.

My Method page after extending User Profile definition



Updating the caches

The Business Desk offers several places where the different caches can be updated. This is standard Commerce Server functionality. The caches are:

- Campaigns > Publish Campaigns

- Catalog > Catalog Editor
- Users > Publish Profiles
- Targeting > Publish PCOs

User targeting

The Business Manager can specify that an advertisement will appear on all pages of the site. However, a campaign may have greater impact if it is targeted to a specific group of users.

Next, you will set up a Campaign Expression and place it in a new Target Group. The expression will be **ContentPreference is equal to Business**.

The Campaign Expression targets users. You will call the Expression "Biz Articles", and the Group "BizArticleGroup". A Group can contain one or many Expressions.

The result will be that a user who indicates a preference for business articles will be targeted by the business ad.

Campaign Expressions

Campaign Expressions are also called target expressions. A Campaign Expression is like a database query. Its conditions are defined when the expression is created.



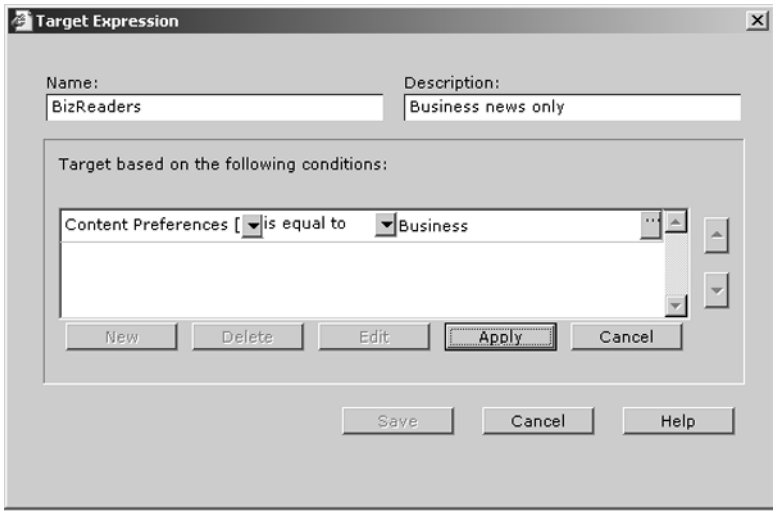
Note
You have the option of creating a new expression from the Target Group "Edit" or "New" window. So the creation of Campaign Expression and Target Group can be done in either order.

Now you will create a Campaign Expression called **BizReaders**.

Creating a Campaign Expression

1. On the Business Desk, expand "Campaigns". Click **Campaign Expressions**. The "Campaign Expressions: Target Expressions" window opens.
2. Click **New Target Expression** on the toolbar.
3. In the "Target Expression" window:
   - type **BizReaders** in Name
   - type ***Business news info only*** in Description
   - click **New** under the "Target Builder" pane
   - from the left-hand drop-down list, select **User Object > Preferences > ContentPreferences**
   - from the center drop-down list, select **is equal to**
   - from the right-hand drop-down list, select **Business**. The expression should look like the following:

Target Expression



Note
If multiple expressions are required, click **New** and repeat the last two steps. Subsequent expressions will start with "and".

4. Click **Apply**, then **Save** to return to the "*Campaign Expression*" screen.

   Your new Campaign Expression and its description appear in the expressions list.

Target Groups

Target Groups contain one or more campaign—or target—expressions that define the users who belong to that group. For example, the target could be "all users interested in Servers".

Now you must place the **BizReaders** expression into a Target Group. Although it could be placed in an existing Target Group, you will create a new Target Group called **Biz Readers Group**.

Creating a Target Group

1. On the Business Desk, expand **Campaigns** and select **Target Group**. A "Target Group" window opens, listing all existing Target Groups.
2. Click **New Target Group** on the toolbar.
3. In the "New Target Group" window:
   - type ***Biz Readers Group*** in "Target Group Name"
   - click **New** under the "Expression" pane
   - from the drop-down expression list, select the **BizReaders** expression you just created

- set “Action” to **Require**
- click **Accept**.

4. Click **Save and Back to Target Groups Lists** on the toolbar.

   Biz Readers Group is listed in the “Target Group Name” window.

All the Target Groups will be used later, so it is necessary to create some more target groups at this time.

Repetition of these steps to create more expressions and groups will give you a chance to understand the process clearly. See if you can complete them without referring to the steps above.

Creating additional Campaign Expressions and Target Groups

Create two additional campaign expressions with the following settings:

- TechReaders in a Tech Readers Group, where Content Preference is equal to “Technical” and “Action” is equal to “Require”
- AnyReaders in an Any Readers Group where Content Preference is equal to “Any” and “Action” is equal to “Require”.

Target an advertising campaign

You are now prepared to target a specific advertisement to a specific group.

Targeting an advertisement for business readers

1. In the Business Desk, expand “Campaigns” and select **Campaign Manager**.
2. Navigate to **Method Systems > e-commerce > Expedition XL5**.
3. Highlight it and click **Open** on the toolbar.
4. In the “Campaign Manager” window:
   - expand “Ad Target”
   - check **Show on all page groups** box
   - in the “Target Groups” pane select **Biz Readers Group** and click **Add**—the group moves to the “Assigned” pane.
5. Click **Save and Back** on the toolbar to return to the “Campaign Manager” window.

Targeting an advertisement for technical readers

Follow steps 2 to 5 above to target the advertisement **Maestro Mambo** to Technical Readers.

The final step, once all the targeting is complete, is to update the Method Systems database with this new information, and update the cache.

Publishing the advertisements

1. Click on **Publish Campaigns**.
2. In the "Publish Campaigns" window, highlight **Advertising**.
3. Click **Publish Changes to Production and Refresh Cache** on the toolbar.



Note

Now that the advertisements are targeted, you will look at creating users. Once you have users, who are interested in Business and in Technical, you will see these advertisements on the appropriate pages on the Web Author.

Viewing the results

Next you will edit User Profiles in order to view the advertising campaigns you have targeted. You have already created your own Registered users through the Web Author.

Anyone who visits the Web Author can become a Registered user. All other users—Pre-registered users or Manager users—must be added by the Business Manager using the Business Desk.

The "Users" category on the Business Desk allows the Business Manager to add or edit *any* User Profile.

First, you will log in as the Registered user you created earlier—*RegUser*. Recall that you set your preferences to PDAs at that time. Since then, you have added another selection —Content Preference—to the My Method page. This field will be blank.

You will be checking the advertisements visible to the user and changing the preference to demonstrate how the advertisement will change.

Logging in as RegUser and viewing the advertisements

1. From the navigation area, click the **Login** link.
2. At the top of the screen:
   - Type ***RegUser*** in the "User name" field
   - Type ***password*** in the "Password" field. Click **Submit**.

   Notice that the content is about PDAs, because you selected PDAs from the content preference list when you created this user.
3. From the navigation area click **My Method** to access the User Profile.
4. Select "Business" as your content preference.
5. Click **Update**, then click **Home**.

   You should see the advertisement "Expedition XL5" on this page.
6. From the navigation area click **My Method** to access the User Profile.
7. Change the content preference to "Technical". Click **Update**.
8. Click **Home**.

   You should now see the advertisement "Maestro Mambo" on this page.
9. From the navigation area click **Logout**.

Editing a Pre-registered user in the Business Desk

You can make a change to your Pre-registered User Profile through the Business Desk. Some attributes can *only* be changed from the Business Desk—for example "Partner Type". To make the change, you will need to search for the user. You will add another preference to *RegUser*'s profile.

1. On the main Business Desk expand "Users" and select **Users**. The "Users" window opens.
2. In the "Find" pane:
   - select **Account Status** from the **Find by:** drop-down menu—note that the field below is now called "*Account Status*"
   - select **Active Account** and click **Find Now**. A list of all active users is displayed.
3. Highlight *RegUser* from the list.
4. Click **Open User** on the toolbar. The "Update User" window opens.
5. Expand **Preferences**. Check **Highlight Servers**.
6. From the Content Preference drop down menu, select **Business**.
7. Click **Save and Back** on the toolbar.
8. Open the Web Author and log in as registered guest *RegUser*.
9. Go to MethodSystems.
10. Notice that *RegUser* now shows a preference for Servers and Business.

Module 5

Page Profiling

Page Profiling overview

On completion, you will understand how to:

- add a Page Profile property to the Page Profile Definition
- create a Content Management Server page and Page Profile
- edit a page and a Page Profile using the Web Author
- edit a page and Page Profile using the Business Desk.

Tip

In this module:

- unless otherwise indicated, these procedures would be carried out by the Business Manager.
- the steps must be executed in the order in which they are presented.
- the output from this module will be used in the *PCOs* module.
- for convenience you should minimize—rather than close—the Business Desk between procedures.

Page Profiles

You were introduced to User Profiles in the *Commerce Server* module.

In addition to User Profiles, Content Connector uses Page Profiles. These profiles work in a similar manner, but a User Profile describes a site user and a Page Profile describes a Content Management Server page. Each Content Management Server page has its own Page Profile, just as each user has a unique User Profile.

Note
In order to insure that each page has a profile, the page ***must*** be created using either the Web Author or the Business Desk. The profile will be *automatically created* as the Content Management Server page is saved.

Both types of profiles are a part of the building blocks from which PCOs are built.

Page Profiles are managed by the Business Manager on the Business Desk in **Content > Page Profiles**.

In addition, all profiles can be programmed via the templates and ASP script.

Page Profile Definitions

As with User Profiles, there is a *single Page Profile Definition* for all Page Profiles—the Page Profile Definition. The profile definition contains the profile properties. The properties are further defined by a set of attributes.

- Properties — a collection of metadata that describe a Content Management Server page, for example: Name, StartDate, Site Term
- Attributes — The attributes of a page property determine how it will appear on the site. For example, the data type of a property: string, date, site term.

For more information on properties and attributes refer to *Creating Page Profiles* in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

How profiles work together

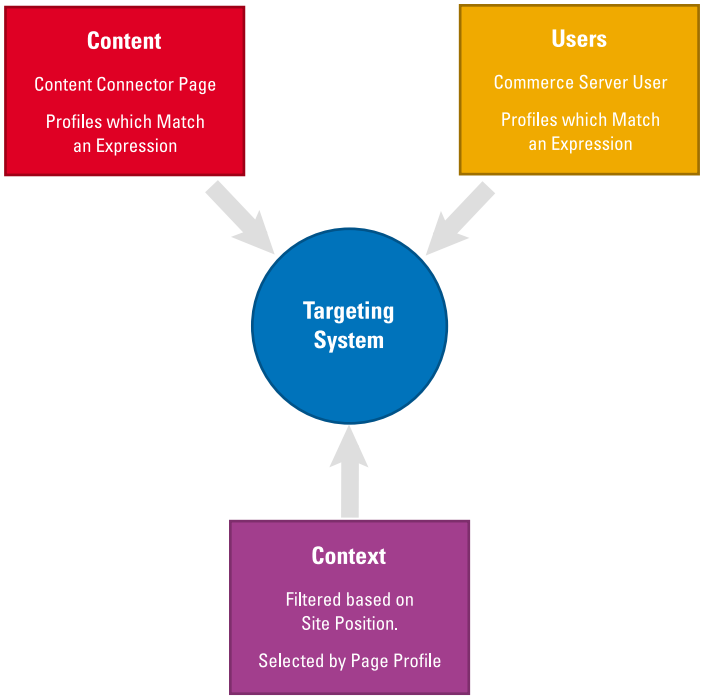
Both Page Profiles and User Profiles are filtered through the Commerce Server's targeting system.

Note
Context filtering is a separate step that is defined after the creation of the PCOs and the Rich Product pages. The context tells where and when to display the pages.

- Context filtering is done by specifying Page Groups and Page Positions. This is covered in the *Personalized Content Objects* module.

Personalized Content Objects (PCOs) match the Page Profile, the User Profile, and the Context. This results in the correct information being served to the user. You will look at PCOs in a later module.

Targeting PCOs



You can see in this diagram how all elements work together to target the right output to the right user or page.

Adding a new Page Profile property

Before the Page Profile can be assigned to a page, its properties need to be defined by the Business Manager. The properties determine what information is collected in the Page Profile.

The Business Manager uses the Business Desk to add or modify properties to a profile definition to specify what data the profile definition will collect, and to specify the attributes of the properties of a profile definition.

For more information on attributes refer to "*Creating Page Profiles*" in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

You will extend the Page Profile Definition with a new property—**Content Focus**.

Before you begin

Review the following information and refer to it as you work in the Business Desk. It will help when setting up the various components.

- **ContentFocus** will only apply to News pages and not Product pages.
- Conversely, **ProductCategories**—which has already been created in the sample site—is relevant to both News pages *and* Product pages.
- Only Product Pages should be designated as "Specials" when applying the Page Properties.
- As you work through the steps you will note that items have been placed in different groups. For example, Content Profiles has three sub-groups: "General Information", "Product Information" and "Automatic Posting Properties". These subgroups are optional and can be set up in any way. However, this grouping is useful when there is a large number of properties.
- The default setting for all new custom property attributes is "visible" and "write". This is mostly what you will require. However you may want to change some settings. For example, Start Date is set to "Hidden" since it is not desirable for this to appear on the page. For further information on this, refer to *Custom Attributes* in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

Adding a Page Profile property

1. On the Business Desk navigation pane, expand "Users" and click **Profile Designer**.
2. In the "Profiles" pane select **MSCMS Page Profile** and click **View** on the toolbar. The "Page Profile" window opens.
3. Expand **General Information** and highlight it.
4. Click **Add** below the "Properties" pane.
5. Select **Add a New Property** and click **OK**.

6. In the "Attributes" category:
   - type ***ContentFocus*** in Name
   - type ***Content Focus*** in Display Name
   - from the "Type" drop-down list, select **Site Term**
   - click **Browse** beside the "Type reference" drop-down list — the "Site Term selection" window opens.
   - expand "Method Systems Site Terms" and select **ContentFocus**
   - click **OK**.
7. Expand "Advanced Attributes" and:
   - check the **Active = Yes** *checkbox*
   - click **browse** beside the "Map to Data" field. Browse to **Profile_service_SQLSource > MSCMS Page Profile**. Select **u_ContentFocus(STRING)** in the drop-down list, and click **OK**
   - click **Apply** to create the new Page Profile attribute.

   Notice that "New Property 1" is renamed "ContentFocus" in the "Properties" pane.
8. Click **Save and Close** on the toolbar to save your work and return to the Business Desk.
9. In the Business Desk, expand "Users" and select **Publish Profiles**.
10. Highlight **MethodSystems.**
11. Click **Refresh Cache** on the toolbar.
12. This will update all your changes in the database and may take a few seconds.



Tip

If the page does not refresh, go to your computer desktop and select **Run** from the **Start** menu. Type ***iisreset*** and click **OK**.

Creating a news page and its profile

As a Content Management Server Author, you can create a Content Management Server page and its profile. The Page Profile stores metadata about pages. It will be matched up with User Profiles so that the user is served up pages that contain relevant content.

The process of matching also includes Context Profiling that ensures that complimentary information appears on the page. For example, links to articles—or product pages—about tents appear in a news article about waterproofing tents.

To see this, you will create a News page containing an announcement about the Maestro G5 Server. You will be using the **Content Focus** profile that you just created, plus **Product Categories** (which is already present in the Page Profile Definition) to target the page.

This process has been broken down into four steps:

- selecting the appropriate page template
- creating content
- targeting the page by creating a page profile
- publishing the page.

Selecting the appropriate page template

1. Open your browser and go to the URL **http:// < your server name > /CS2000**.
2. Click **Login** on the navigation area.
3. In the Partner login area, log in as *Author1*, password **password**.
4. Click on the **News** link in the navigation area—or one of the news headline links at the bottom of the home page. You are now in the News part of the **Content Management Server** site.

Note
On this site the news pages have been organized into sub-categories. The Education, Government and OEM categories hold pages that will only be visible on the live site to certain users, as discussed in the module on *User Profiling*.

News link browser



5. In the Browse menu on the top left of the screen, select **General News**.
6. Click **Switch to edit mode** in the navigation area**.**

   A Tools menu appears, which expands when the cursor hovers over the arrow.

Tools menu

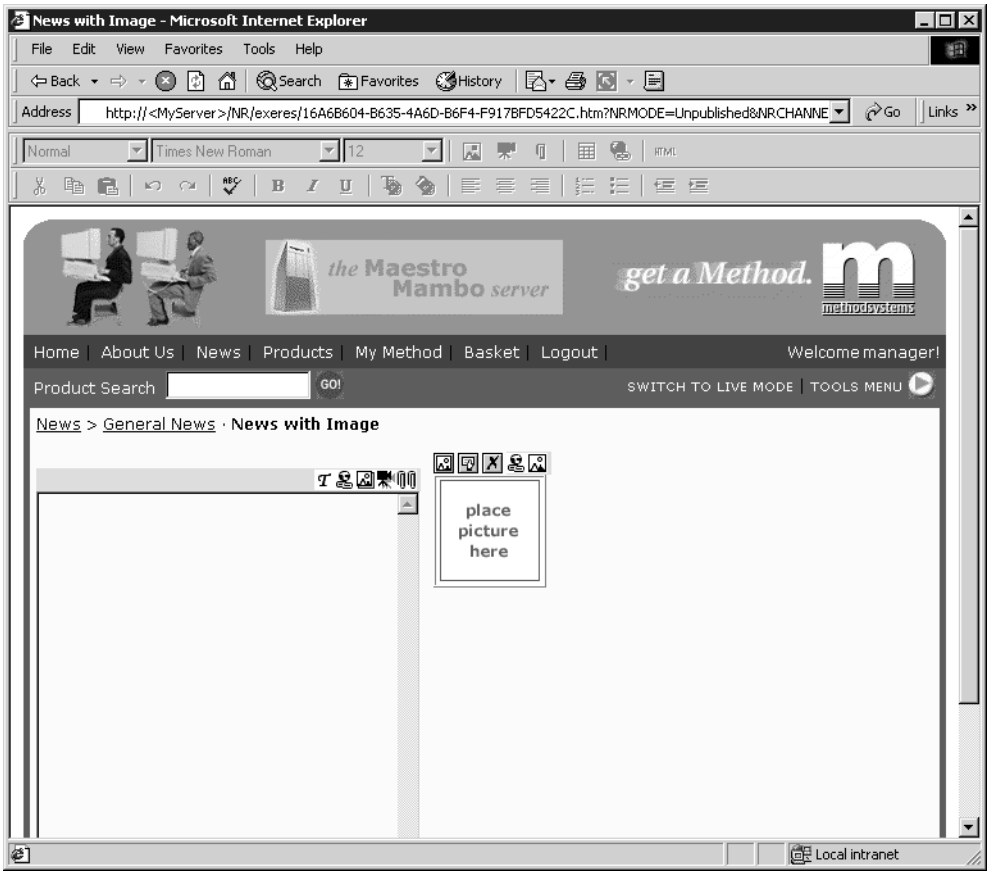


7. Expand the Tools menu and click **Create New Page**.

   The template gallery selection window opens.
8. Click the **News template** link to go to the News template gallery.
9. Click **Select** beside the “News with Image” template.

   You are now in edit mode on a new page for a news article. You can see that the title of the page is “News with Image”.

New news page in edit mode



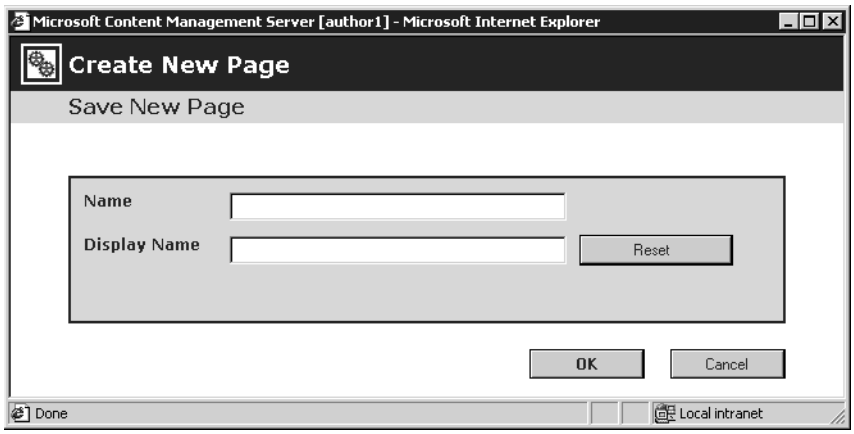
In this news page template, the placeholder on the left allows you to type and format text directly, cut and paste formatted text or tables from Office applications, and insert images or videos. The placeholder on the right is for an image only.

Creating content

1. Add an appropriate graphic.
2. Create some content relevant to the preferences you have been assigned for this new News page. For example “Some business information about PDAs”.
3. In the Tools menu, Click **Save**.

   The “Save new page” dialog box opens.

New page dialog box



4. In the "name" field, give your article a name.
5. In the "display name" field, give your article a relevant name—this will appear at the top of your news page—for example "*Author1* PDA Business News Story".
6. Click **OK.**
7. In the Tools menu, click **Save and Exit.**

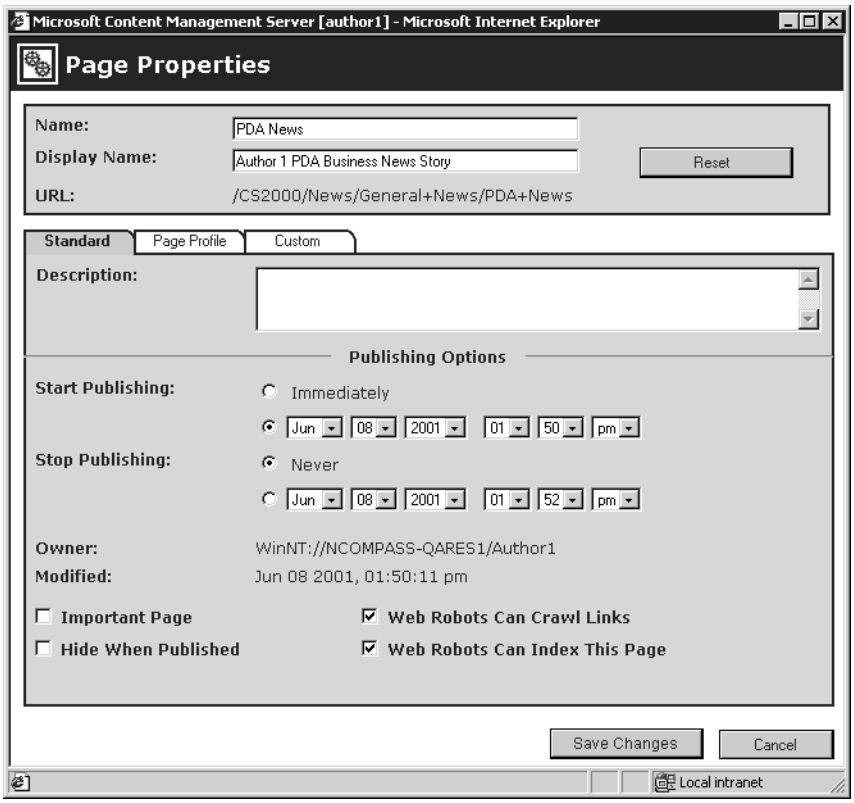
   Remain in edit mode so you can target the page.

Targeting the page

1. In the Tools menu, click **Page Properties.**

   The "Page Properties" window opens. Notice the information you just entered.

Standard page properties



2. In the "Page Properties" window, in the "Standard" pane:
   - set the expiry date, but *do not* change the Start date—making the Start date later than the default will delay the publishing of your page.

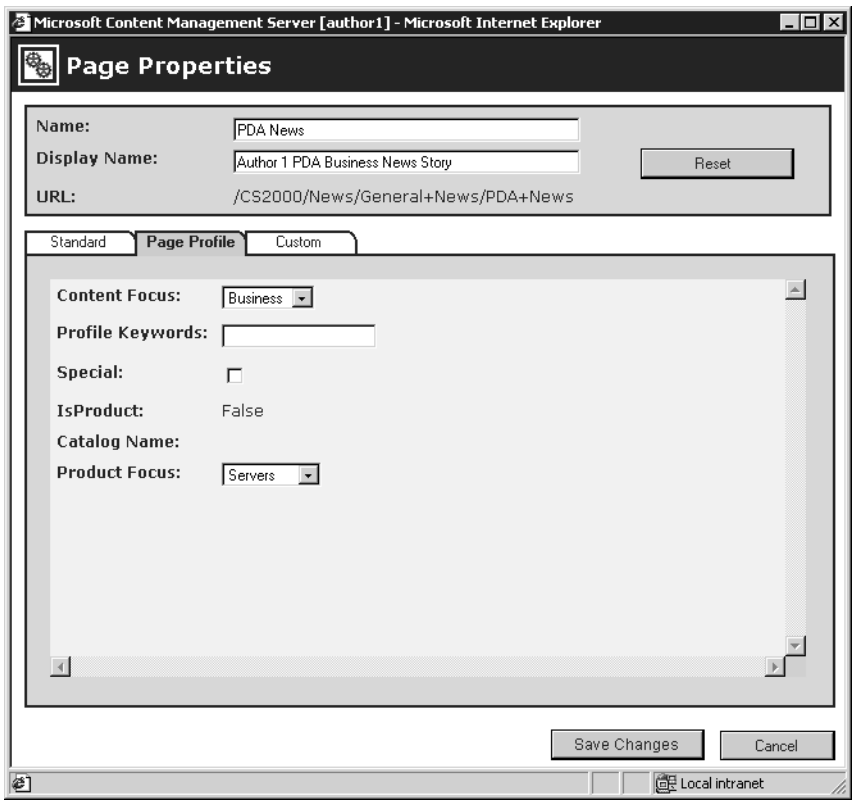
   Notice that the status of this page in the Tools menu is "Saved".

   Now you will specify the Page Profile.
3. Click the **Page Profile** tab
   - from the 'Content Focus' drop-down list select **Business**
   - from the 'Product Focus' drop-down list select **PDAs**

   *Do not check the "Specials" checkbox as this is **not** a product page*
   - click **Save changes** to exit the window.
4. In the Tools menu, click **Submit**

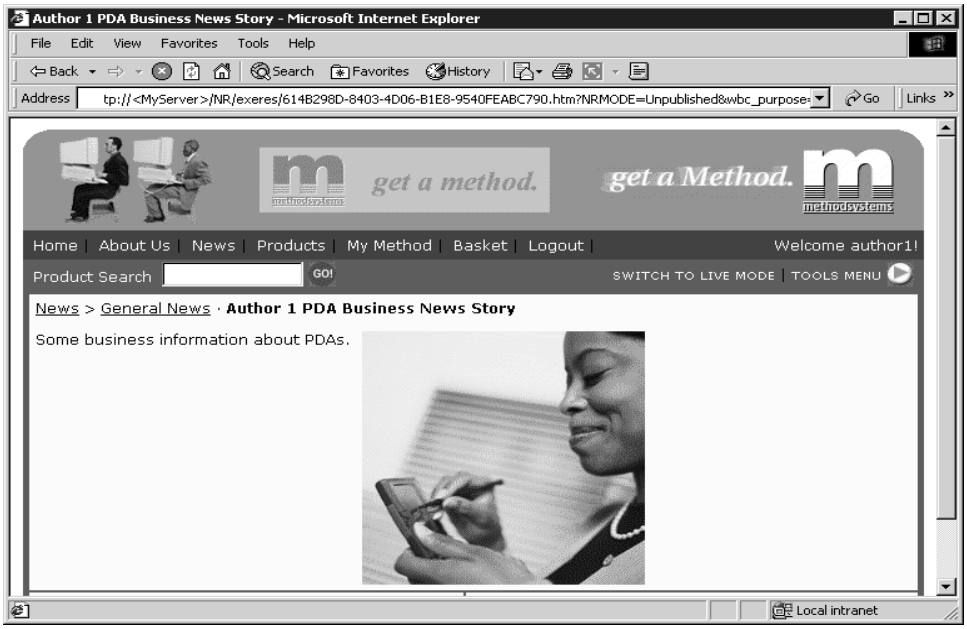
   Notice the status of this page in the Tools menu is now "Waiting for Editor Approval".

Completed Page Profile



Note
Since this is a news page "IsProduct" is set to false.

Completed news page in edit mode



5. Click **Switch to live mode**.

   Notice that this does not yet reflect the page you have created because, as the final step, the page must be published, and then the profile published from the Business Desk.

Publishing the news page

1. To approve this new page, log out as *Author1*.
2. Log in again as *Editor1*.
3. Click **Switch to edit mode.**
4. In the Tools menu, click **Approval Assistant**.

   The Approval Assistant window opens.

5. Check the checkbox beside your page and click **Approve.**
6. Close this window.

   You now need to refresh the cache *to update the changes in the database. It may take a few seconds. To do this:*

   - go to the Business Desk
   - expand “Targeting”
   - select **Publish PCOs** and highlight the cache name
   - click **Refresh Cache** on the toolbar.

See the targeted news page

To demonstrate the targeting of the news page:

1. Log out of the Web Author and log in as a user who has ***not*** specified PDAs as a Content Targeting Preference. The article will not appear.
2. Go into My Method and change the user's preference to PDAs, and click **Update**.
3. Return to the home page and see that the main article is now a Special about PDAs. Your news article is the first in the Headlines area of the screen.

Editing your work using the Web Author

You will now edit a page using both the Web Author and the Business Desk.

Editing Page Profile using the Web Author

Bear in mind that changing a Page Profile changes all the pages on your site that are based on that profile.

1. If you are not already there, open your browser and go to the URL:

   http://<your server name>/CS2000.
2. Click **Login** on the navigation area and log in as *Editor1*, password **password**.
3. Click **News** on the navigation area. A page of new links opens up.
4. In the Browse window on the News page, click the **General News** link.
5. Click on the news page you created.
6. Click **Switch to edit mode** on the navigation area.
7. Click **Page Properties** on the navigation area. The "Page Properties" window opens.
8. Make a change. For example, you could change the Content Focus to "Technical".
9. Click **Save changes**.
10. From the navigation area click **Logout**.
11. Return to the Home page.
12. Refresh the cache.

Editing Page using the Web Author

1. On the Web Author, click **Login** on the navigation area.
2. Log in as *Editor1*, password **password**.
3. Navigate to the news page you created, in News > **General News**.
4. Click **Switch to edit mode** on the navigation area.
5. In the Tools menu, click **Edit**.
6. Make a change to the content in the placeholder.
7. When you are finished, click **Save and Exit** in the Tools menu.
8. Click **Approve** in the Tools menu.
9. Click **Switch to live mode** and see your changes there.
10. From the navigation area click **Logout**.
11. Close the Web Author.

Editing your work using the Business Desk

It may be more convenient for you to edit the Page Profile, or approve pages for publication, by accessing them from the Business Desk.

Edit Page Profile using the Business Desk

1. On the Business Desk expand "Content" and select **Page Profiles**.
2. In the "Page Profile" window:
   - in the "Find by" drop-down list, select **Product Focus**
   - in the "Product Categories" drop-down list, select **Servers**
   - click **Find Now.**

   A list of profiles matching the criteria opens.
3. Highlight the Page Profile you just created and click **Open selected page** on the toolbar.
4. Make a change to the profile. For example change the Content Focus back to "Business".
5. When finished click **Save and Back** on the toolbar to return to the Business Desk.

Edit/Approve Page using the Business Desk

1. On the Business Desk expand "Content" and select **Page Profiles.**
2. Click **Find By** and select **Name** from the drop-down list.
3. In the "Name" field type * and click **Find Now**.

   Since you used the wildcard, a list of all pages will display.
4. Highlight the news page you created.
5. Click **Go To Selected Page** on the toolbar.

   A login window appears.
6. At the login, log in as *Editor1*.

   The Web Author opens at the requested news page, in edit mode.
7. On the Tools menu, click **Edit**.
8. Make a change to the page content.
9. On the Tools menu, click **Save and Exit.**

   *If you switch to live at this point, your changes will **not** appear.*
10. On the Tools menu, click **Approve**.
11. Click **Switch to live mode** on the navigation area.

    The changes appear on the live site.
12. Close the Web Author.

Module 6

Personalized Content Objects

PCO overview

On completion, you will understand how to:

- create the remaining elements to build a PCO
- create Content Expressions and Content Groups
- define the context
- create a PCO using Target Group and Content Group.

Tip

In this module:

- You will use the ***Content Focus*** Site Term and the ***Content Preference*** Content Profile that you created previously.
- There is a summary of required components for a PCO.
- You ***must*** complete the creation of all required components before creating a PCO.

What are PCOs?

Personalized Content Objects (**PCOs**) are used for site-wide content control. PCOs allow you to link articles and similar pages on your site to relevant product information and to link product pages to relevant editorial content or other product pages.

Each PCO is an object that creates a collection of Page Profiles upon request. These collections are created when you refresh PCOs in the Business Desk.

The PCOs select pages for targeted summary lists in Content Connector. The purpose is to provide a summary of pages that match a request. Two PCOs may select the same pages, but the order would be different, depending on the profile.

When a user requests a Content Management Server page that contains a PCO 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 PCOs 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.

Review of completed steps

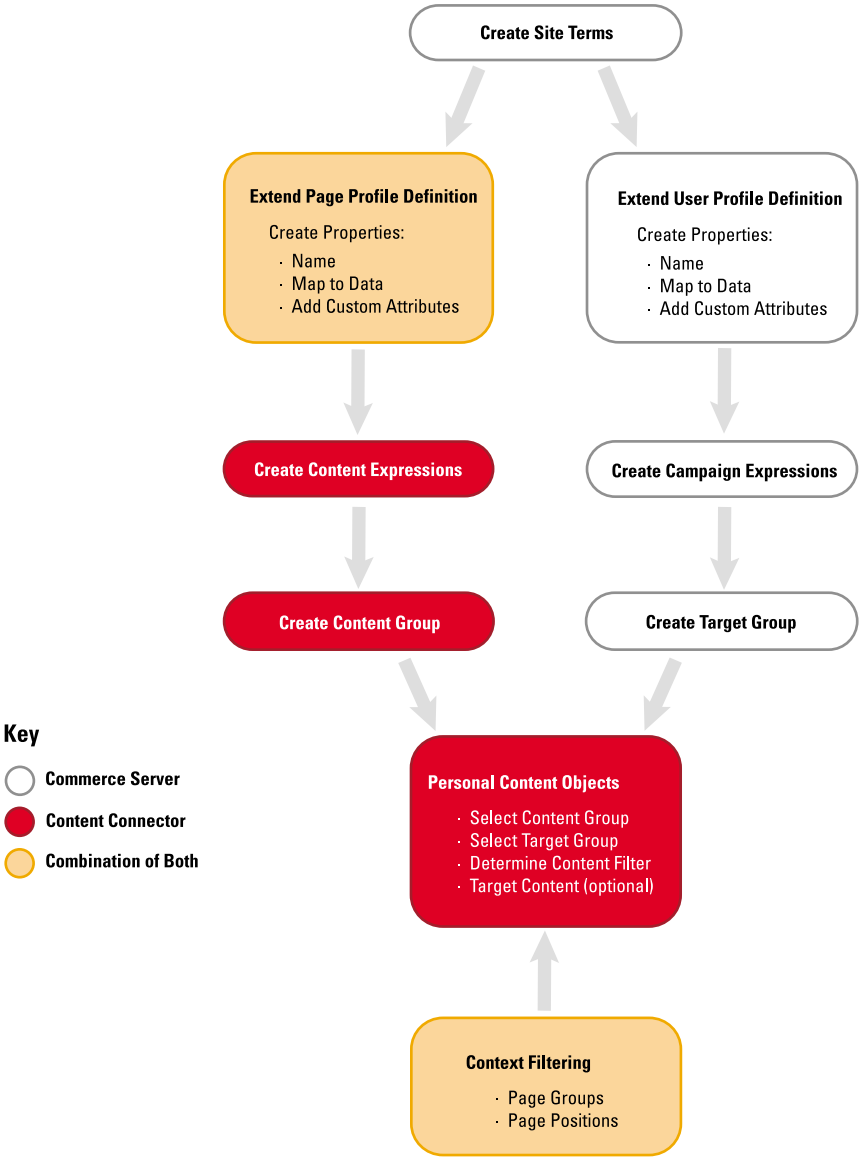
Refer to the graphic "The building blocks for PCOs" to see which components you have created so far, and which you still need to create.

So far, you should have:

- created Site Term—**ContentFocus**: "Business", "Technical", "Any"
- extended User Profile Definitions—**ContentPreference**
- created Campaign Expressions—"BizReaders", "TechReaders", "AnyReaders"
- created Target Groups—"Biz Readers Group", "Tech Readers Group", "Any Readers Group"
- extended Page Profile Definitions—**ContentPreference.**

If you do not have all of these, you need to complete any missing components before proceeding. Failure to do so will result in PCOs which do not act as you expect.

The building blocks for PCOs



All the elements in the above graphic must be present before a PCO can be successfully created and used.

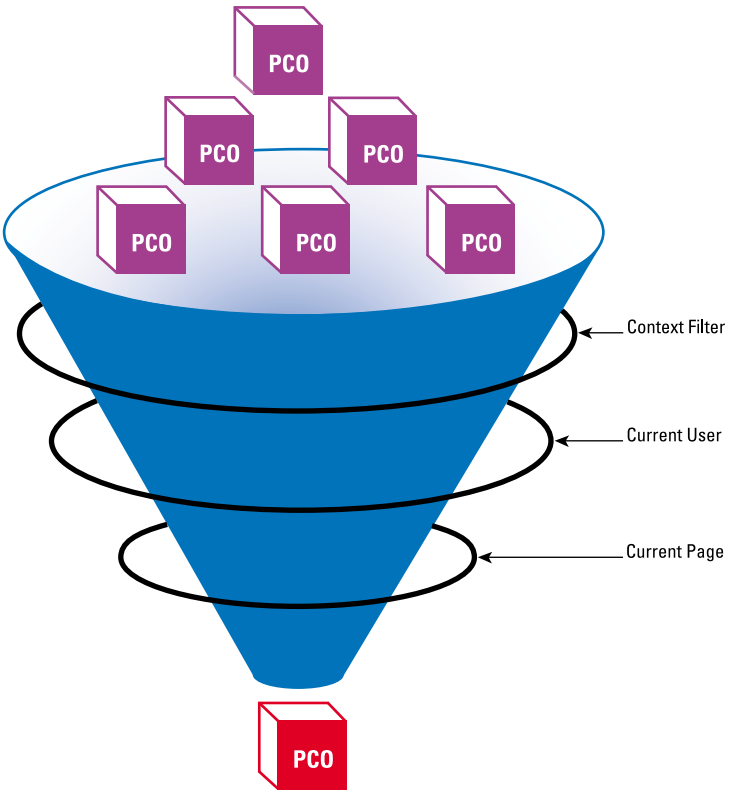
Remaining elements required by a PCO:

You will complete the following Content targeting before you create a PCO:

- Content Expressions
- Content Group
- Context.

First, let us understand PCO filtering and the part it plays in what is delivered to a site visitor.

Filtering PCOs



This graphic illustrates how the targeting system sifts through all the PCOs. It first looks at the Context, then the current User Profile, and finally the current Page Profile. All the PCOs that do not match are discarded, until the ones that match are left.

PCOs

- appear on both Rich and Simple Product pages—this is a result of ASP programming
- can only be specifically targeted from Rich Product pages—Simple Product pages do not have profiles.

In the Method Systems sample site, four types of PCOs have been created. They are:

- Product Specials
- Related Products
- Related News
- Headline News.

Product specials

These PCOs deliver pages offering "Specials" on products.

Product Specials Pages should be sorted by user product interests and targeted within these Content Groups:

- Server product specials
- Notebook product specials
- Desktop product specials
- PDA product specials.

In other words, the specials can be sorted so that the user's product interest, or interests, will appear first.

Related products

These PCOs deliver Product pages whose content relates to the product focus of the currently displayed news article. Pages are based on context—whether the product relates to the news article currently being read—rather than the user's preference.

Related product pages depend on the following Content Groups:

- Server products
- Notebook products
- Desktop products
- PDA products.

Script in the template sorts pages. Pages are sorted by score or by date, with the most relevant or most recently published page appearing first.

Related news

These PCOs deliver News articles whose content relates to the product focus of the currently displayed news article. Pages are based on context—which news article is currently being read—rather than the user's preference.

Related news pages depend on the following Content Groups:

- Server news
- Notebook news
- Desktop news
- PDA news.

Script in the template sorts pages by date, with the most recently published page appearing first.

Headline news

In the sample site, the Headline News page is a simple headline summary that shows the most recent news articles. Script in the template sorts these pages by date.

These pages depend on the following Content Group:

- All News.

Preparing to create new PCOs

A PCO requires information from various other objects. You will first look at what these are and how to create them. You have already created some of these objects.

The graphic "The Building Blocks for PCOs" summarizes the flow that is required for the creation of PCOs. It also illustrates how Content Connector and Commerce Server work together.

The Business Manager creates the PCOs and their various contributing elements. However, the Business Manager works with the Template Designer to agree on the context filtering criteria.

Such things as where the personalized headlines and the product specials will be placed on the site should be agreed when the templates are being designed.

The Template Designer creates the templates for each channel and is concerned with the type of content—headlines, products, specials—rather than the content focus. For example, any news release will go into a placeholder, whether it is of a Business *or* a Technical nature. The only concern is that it *is* a news release and will use the appropriate template.

The script invoking PCOs is also created by the Template Designer.

Content targeting

This module examines the page—or content—elements required for the creation of a new PCO. PCOs are managed in the PCO Editor. All the elements must be in place before you attempt to create a PCO.

The Business Manager can also specify how to group pages (content) so that a user going to a particular product will also be served links to other pages with similar content. For example, if a user goes to the Method systems page on PDAs, links are visible to all the PDA pages that have been defined in the PDA Page Profile.

Content Expressions

As Campaign Expressions target users, Content Expressions assemble Page Profiles into a list. A Content Expression is like a database query. It is based on conditions selected when the expression is created.

Content Expressions are created using steps similar to those you used when creating Campaign Expressions. For example, let's say that CampaignExpressionA is to target all users who are interested in servers. The expression is:

```
User.Server.Preference is equal to true
```

Compare this with ContentExpression1, which might be set to target all pages about servers. The expression would be:

```
PageProfile.ProductCategories is equal to Server
```

Creating a Content Expression

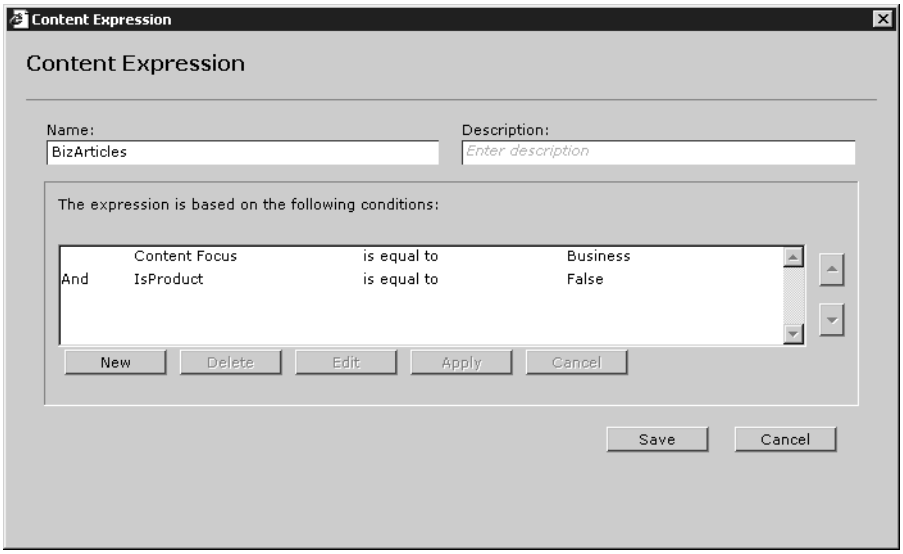
In creating this Content Expression, you will select content if the content preference is equal to business, and also, if the content is not a product—in other words you will select business news content.

You will then place that Content Expression into a new Content Group called **BizArticleGroup**.

1. On the Business Desk, expand "Targeting". Click **Content Expressions**. A "Content Expression" window opens.
2. Click **New** on the toolbar. The "Expression Editor" opens.

3. In the "Expression Editor" window:
   - type ***BizArticles*** in Name. Click **New** at the bottom of the second window
   - from the left-hand drop-down list, select **Page Profile > General Information > Content Focus**
   - from the center drop-down list, select **is equal to**
   - beside the right-hand drop-down list, click **browse**. In the "Choosing a Site Term" window select **Business**. Click **OK**.
4. Now create an additional expression in this window:
   - click **New** below the expression window
   - from the left-hand drop-down list, select **And**
   - from the next drop-down list, select **Page Profile > Product Information > IsProduct**
   - from the center drop-down list, select **is equal to**
   - from the right-hand drop-down list, click **false**
   - Click **Apply**.

   The window should look like this:



5. Click **Save** to return to the Business Desk.

   Your new Content Expression appears in the expressions list.

Content Groups

Content Groups are similar in behavior to Target Groups.

They define a set of Page Profiles that share some common properties. They also define what the PCO returns.

Content Groups contain one or more Content Expressions that define the set of pages that belong to that group.

Tip
You can combine expressions to narrow down your search results. For more information on this, refer to *Using PCOs* in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

Scoring

When creating a Content Group, you will set the "Action" attribute of that Group to one of the following:

Require—will be included in the group

Exclude—will be excluded from the group

Targeted—will increase the score of members selected by the expression

Reduced—will reduce the score of members selected by the expression

These designations are used by the PCOs when pages are sorted by score. The Content Group is ranked in order of importance according to its score.

Only those profiles that match the "require" attribute—and *not* the "exclude" attribute—are returned. That is, "require" and "exclude" define whether or not they will be included in the set. "Target" and "reduce" rank the items in the set by their score.

For example, consider the following:

Expression1: All pages about servers - Require

Expression 2: All pages with technical focus - Target

The result will be that pages about Servers will be shown, and in addition, the Technical pages about servers will appear first in the list.

You will see how this works when creating the PCOs. For more information on scoring refer to *Creating PCOs* in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

Blending

Blending occurs when more than one PCO is selected by the targeting system to meet a user's requests. The results of all selected PCOs are blended so that there is no overlap.

For example:

PCO 1 contains A,B,C and explicitly targets C

PCO 2 contains—and explicitly targets—C,D,E,F

The resulting blend is A,B,C,D,E,F

If an item is targeted in more than one of the PCOs it will score higher than items appearing in a single PCO. In the above example:

item C scores highest since it is targeted twice

D, E and F score next since they are targeted once

A and B have the lowest score since they are not targeted at all

For more information on blending refer to *Creating PCOs* in the *MSCMS 2001 Content Connector for CS2K Business Desk User Guide*.

Creating a Content Group

Now you will see an example of targeting. The action of the group is set to Target. As you will recall, this will assign the highest score to the group and override the action of other target groups.

1. On the Business Desk, expand "Targeting".
2. Select **Content Groups**. Click **New Content Group** on the toolbar.
3. In the "Content Group Editor" window:
   - set "Content Group Name" to **BizArticleGroup**
   - click **New**
   - select **BizArticles** as the expression
   - set **Target** as the action.
4. Click **Accept**.
5. Click **Save and Back** on the toolbar to return to the Business Desk.

Creating additional Content Expressions and Content Groups

You have just targeted "Business". In order to complete the targeting, and effectively demonstrate this feature, you need to create additional Expressions and Groups for "Technical" and "Any". See if you can do this without referring to the steps above.

Create these:

- TechArticles in a TechArticleGroup, where Content Focus is equal to “Technical” and “Action” is equal to Target
- AnyArticles in an AnyArticleGroup where Content Focus is equal to “Any” and “Action” is equal to Target.

Defining the context

Context targeting is selected in the PCO creation process.

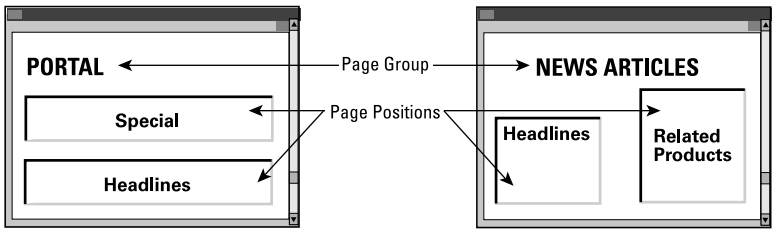
Context Filtering

Context filtering is the first step in reducing the pool of selected PCOs to eliminate what does not match. Refer to the diagram on filtering PCOs on page 66.

The two context elements Page Groups and Page Positions are filtered to select the right PCOs. The information about these elements is stored in the page template.

Discussion

Page Groups and Page Positions



In this graphic you can equate page groups to the page name, and page positions to placeholders.

Page Groups

PCOs use Commerce Server page groups to target a specific location on the site. If no page group is specified, the group defaults to “All” page groups. In most cases it is recommended to use the default setting.

Page Groups can be edited in **Campaigns > Reference tables**.

Note

Leave the Page Group option set at “All Page Groups” in every PCO.

Page Position

An additional filtering step can be added by using page position targeting. For example, in the Method Systems sample site, two separate PCOs appear on the portal (home) page. The first is “News” and the second—at the bottom of the page—is the “Specials” page links.

Page positions can be created and edited in **Targeting > Page Position > Page Position Editor**.

Any changes made to the context filtering will not be viewed until the script in the site starts using them.

Context targeting

Context targeting targets the PCO to users who are currently looking at a page in a specified Content Group. This group can be the same as the one specified for content selection for this PCO, or any other Content Group defined for the application.

This targeting can be done three ways:

- Target the Content Group already specified for the PCO.
  For example, put a list of Server articles on every page about Servers.
- Target a specified Content Group.
  For example, put a list of Server News pages on every product page about Servers.
- Target Any.
  For example, put a list of Server News pages on all pages.

Note
The third method of targeting would generally be combined with the selection of users that like Servers. The other methods do not require User Profiles since they target the pages with a specified content.

Creating the PCO

Now that you have created all the necessary elements, you are ready to create a PCO that combines *user* and *content* profiling to allow the current user to see the content they have requested.

Note
It is a good practice to make a PCO inactive while working on it, and active when it is ready to use.

PCOs can be sorted by start date or score. Scoring was discussed in the Content Groups part of this module. All sorting is done in the templates, using ASP script.

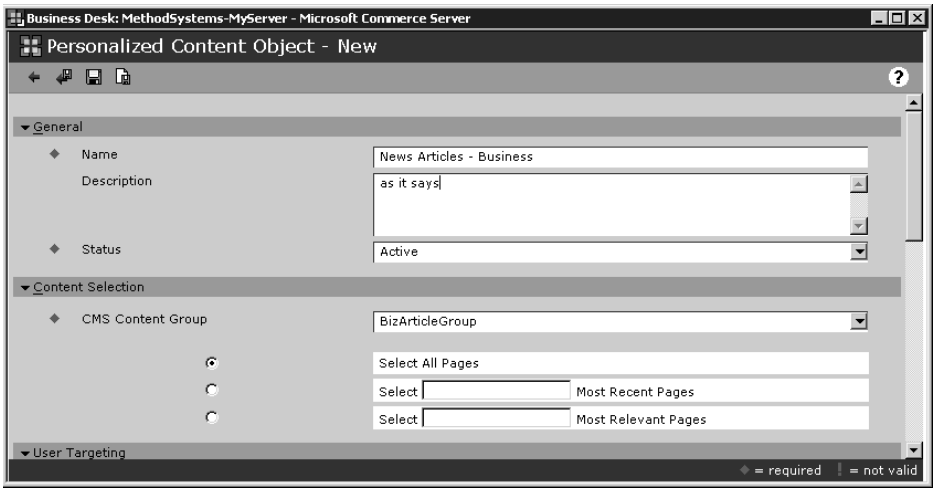
Creating a PCO from Target Group and Content Group

The creation of the PCO uses content that you have already created.

1. On the main Business Desk, expand **Targeting** and click **Personalized Content Objects**. The "Personalized Content Objects" window opens.
2. Click **New** on the toolbar. The PCO "New" window opens.
3. In "General":
   - type ***News Articles - Business*** in Name
   - add a description if you like
   - set Status to "*Active*".
4. In "Content Selection":
   - from the "*Content Group*" drop-down list, select the Content Group you created earlier — **BizArticleGroup**
   - click the **Select All Pages** radio button.

Note
Instead of selecting all pages, the Business Manager could select, for example, the 3 most recent pages—sort by date, or the 5 most relevant pages—sort by score.

Content selection for a PCO



5. Expand “User Targeting”, select the Target Group you created earlier — **Biz Readers Group** and click **Add** to move it to the “targeted” window.
6. Expand “Context filtering” and:
   - check “All Page Groups”
   - in the “Select page positions” pane, select **Headline News**
   - Click **Add.**

> **Tip**
> Checking the Match Content Selection checkbox will match content with the Content Group you specified above—in this case **BizArticleGroup.** Selecting, for example, Server Products would further filter our results to Server business articles only.

7. Click **Save and Back** on the toolbar to save your work and return to the Business Desk.
8. Select **Publish PCOs** in the navigation bar and click **Refresh cache** on the toolbar.

Creating additional PCOs

Now, create these additional PCOs:

- News Articles - Technical for the TechArticleGroup
- News Articles - Any for the AnyArticleGroup

If necessary, refer to the steps above. Be sure to refresh the cache once you have created both these PCOs.

Viewing the results

Make sure that *RegUser* still has a preference for Business articles about PDAs. You could check the user in the Business Desk before proceeding.

As a last step, you will log in to the Web Author and check some pages that illustrate how the Special of the week is about PDAs, and the first news articles are business related news.

Checking the content of a page

1. Open your browser and go to the URL **http:// < your server name > /CS2000**.
2. Log in as **RegUser**, password **password**.
3. If the User's preferences are correct, the site should look something like this:

Registered User sample home page



4. If you are not seeing information about PDAs:
   - click **My Method and** check that preferences are “business” and “PDAs”
   - click **Update**
   - Return to the Home page.

   You should now see the Special on PDAs, and business related news headlines below it.
5. Now try setting preferences to “technical” and “any” and see how the news articles appear in a different order.
6. Click **Logout**.

Module 7

Product pages

Product pages overview

On completion, you will understand how to:

- import a catalog
- create a Content Management Server channel for a catalog
- set a Rich Product page template for a category
- set a Simple Product page for a category
- view Simple Product pages on the live site
- create Rich Product pages using the Web Author
- create Rich Product pages using the Business Desk
- manage product content within Content Management Server workflow
- enable product participation in the personalization process.

Tip

In this module:

- the work completed here is independent of previous work
- as discussed in the prerequisites for this tutorial, in order to complete some of the steps in this module, you will need to have the Site Builder installed.

Importing your catalog

A Business Manager will probably need to import an existing catalog. Importing a catalog is a Commerce Server function. For more details on this process refer to *Catalogs, Importing* in the *Commerce_Server.chm* file.

The time required to import a catalog depends on its size. You can continue working in other parts of the Business Desk while the import is running. You can also exit the Business Desk and come back to it later.

This Commerce Server function is discussed in the *Commerce Server On-line Help*. Also covered is product catalog integration and third-party catalog integration.

Importing a catalog

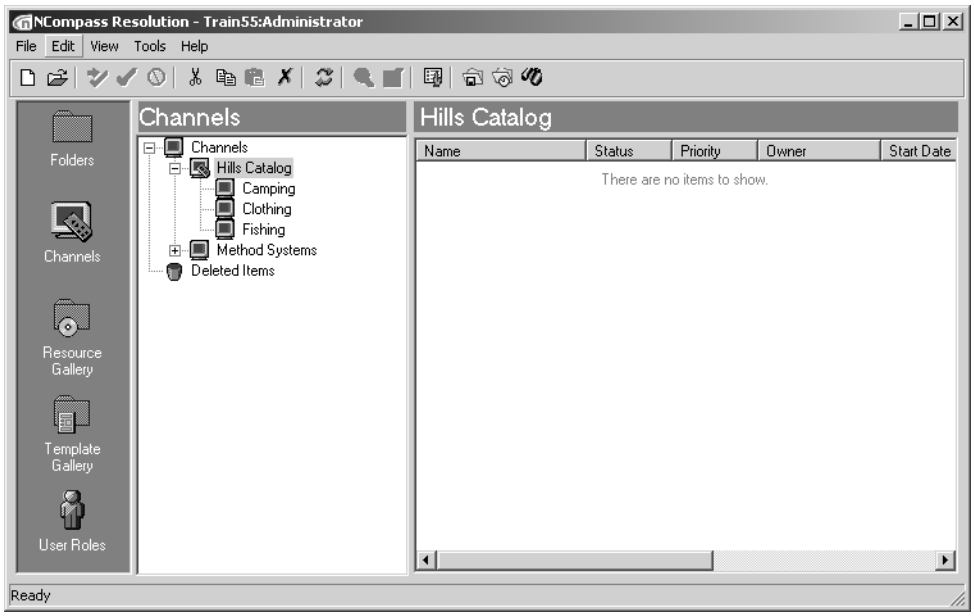
You will import a sample .xml catalog called **Hardware**. You will be using products from this catalog for the steps in this module.

Considerations before Importing

As a Business Manager, you should spend some time planning how you want to organize the catalog on the web site. It is recommended that the catalog has its own channel—or channel structure. This can depend on the size of the catalog, or the number of product categories there may be.

For example, a large sporting goods catalog for *Hill Sports Co.* may be best organized into separate channels for Camping Equipment, Fishing Equipment, Sports Clothing and so on. Adding such a structure to an existing site would look like the following graphic:

Example of a Catalog Channel Structure



Thought should also be given to the look of your site. This involves the creation of new Rich Product page templates. Do you want a different look for different products? For example, a camping template and a fishing template could be created to give camping content a look that distinguishes it from fishing content.

If your site has multiple templates, category properties can be set to select the appropriate template when a new page is created. That is:

- which template—or template gallery—to use
- which Simple Product page to use
- optionally map category to different channels.

Importing a catalog

1. On the Business Desk, expand "Catalog" and click **Catalog Editor**.
2. Click **Import Catalog** on the Catalog Editor toolbar and select **Import XML** from the drop-down list.

3. In the Import XML dialog box:
   - type *<full path name to hardwarefull.xml>* in "Filename"—for example C:\hardwarefull.xml
   - when you are importing a catalog to replace one that already exists in your database, check the "delete existing data" check box to delete the data from the existing catalog before importing the new version
   - click **OK**.

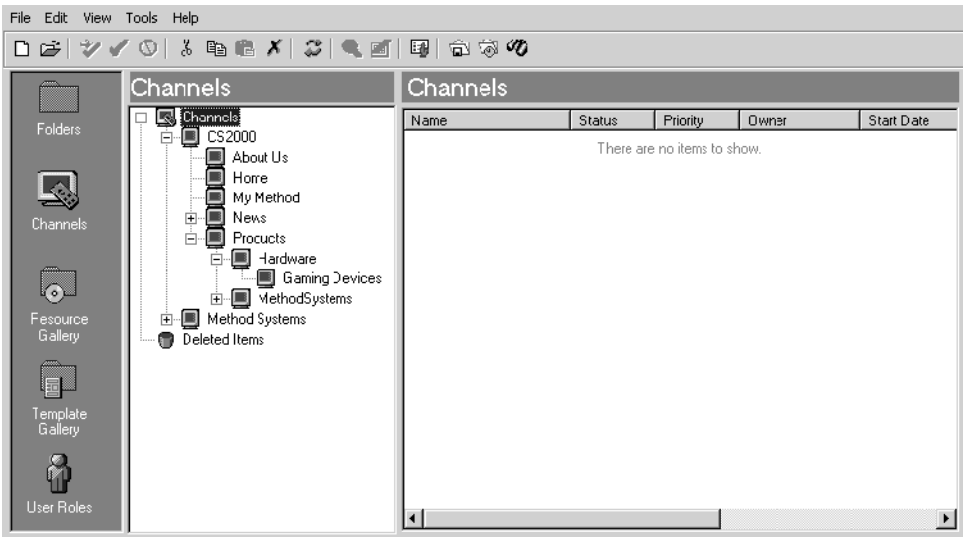
   The status bar displays progress messages.
4. The catalog import may take a few minutes.

Note
If the Hardware catalog name does not appear in the "Catalogs" window, open a different section of the Business Desk and then return to the "Catalogs" window. The name should then appear.

Creating the channel structure

Now you will create two subchannels below **Products**. One channel—**Hardware**—will be at the same level as the **MethodSystems** channel and represents the entire Hardware catalog. Below this, you will create a subchannel—**GamingDevices—**representing a specific section of Hardware product. This will, of course, contain only gaming device products. When completed, the channel structure will look like this:

The new Channel structure



You will then assign the default page templates for use on these channels, create folders, and add a Simple Product page.

It is strongly recommended that the naming and positioning of folders mirrors that of channels for ease of navigation by everyone involved in developing and maintaining the site.

Each channel requires a default template. You have seen that the catalog pages can be separated into relevant sub-channels. By assigning a different template to each sub-channel, an individual look can be achieved for each category.

Creating a new channel

1. Log in to the Site Builder as *administrator*.
2. Click the **Channels** icon in the navigation pane, then expand **CS2000**.
3. Right-click the **Products** channel and click **New Channel**.
4. In the "New Channel" dialog box:
   - type ***Hardware*** in name
   - click the **Rights** tab and click **Select**
   - click **Add Parents Rights**. Click **OK**

Note
It is not necessary to have to have moderators assigned to the channel.

   - click the **Navigation** tab and in the "Navigation Template" pane, check the "Copy from Parent Channel" radio button
   - in the "Select Cover Page URL" pane, check the "MSCMS Default" radio button
   - Click **OK** to close the "New Channel" dialog box.

Creating a new folder

Now you need to create a folder to associate with this new channel. This folder is where pages will be created. You will create it to match the channel structure.

1. In the navigation area click the **Folders** icon.
2. In the "Folders" pane navigate to the "Products" folder and right-click it.
3. Select **New > Folder.**

4. In the "New Folder" dialog box:
   - name your folder **Hardware**, making clear the relationship between it and its corresponding channel
   - add a description if you wish
   - select the **Rights Group** tab and click **Select**
   - click **Add Parents Rights** and click **OK**
   - click the **Publishing** tab and click **browse** beside "Default Posting Channel"
   - in the "Select Channel" window, browse to the "Hardware" channel
   - click the **Hardware** channel and click **OK** to close the "New Folder" dialog box.

Enabling the new channel and setting the defaults

Now you must enable the channel in Site Builder, by linking it to the correct folder.

1. In Site Builder, click the **Channels** icon in the navigation pane.
2. Right-click the **Hardware** channel and select **Properties**.
3. In the "Hardware Properties" dialog box:
   - click the **Web Authoring** tab and check the **Enable Web Author Access on this Channel** check box
   - click **browse** beside **Folder**, and navigate to CS2000 > Products > **Hardware**
   - highlight **Hardware** and click **OK** to select it.



Note
You will ***not*** enable the Template Gallery or the Resource Gallery from here. Because you are working with Content Connector, this must be done from the Business Desk, as you will see when you are mapping the templates.

   - click **OK** to close the "Hardware Properties" dialog box.

Creating "Gaming Devices" Channel and Folder

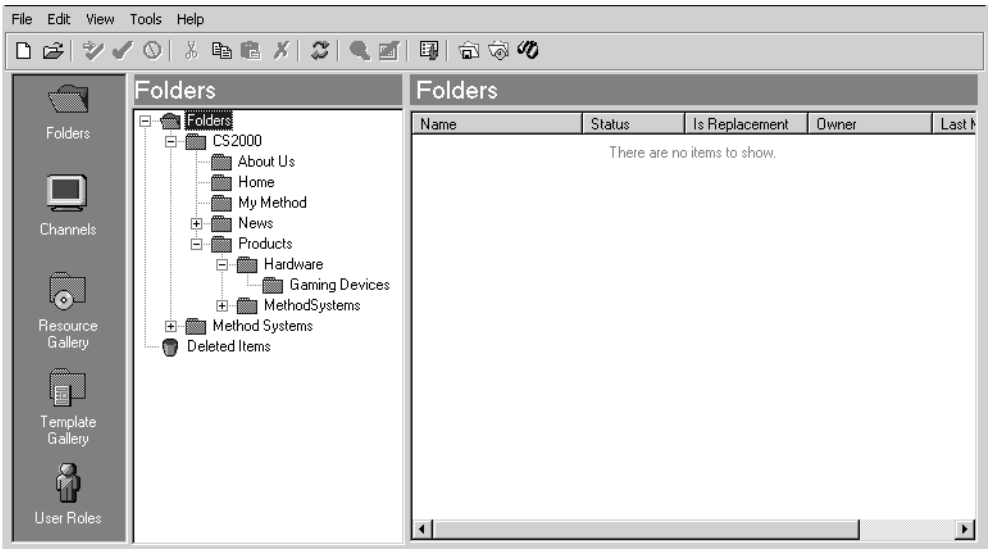
Now you want to create the subchannel that will be exclusively used for Gaming Device products, as discussed earlier.

Follow the steps above to:

- create a channel under the new "Hardware" channel, and call it "Gaming Devices"
- create a folder called "Gaming Devices"
- enable the new channel and set the default folder to "Gaming Devices".

On completion, your folder structure should look like this:

Completed folder structure



Setting up the gaming device templates

You need some new page templates that will then be mapped to appropriate channels. You also need a new page and posting.

Full information on page template creation can be found in:

- *MSCMS 2001 Tutorial*
- *MSCMS 2001 Page Template Designer's guide.*

However, for our purposes, we will simply create templates based upon ones that are already present in the sample site, and make a small change to each. The use of different background colors for the two new Gaming Device templates will clearly indicate which one you are using later on.

We will:

- create a Rich Gaming Product Template
- create a Simple Gaming Product template
- create a new page and posting based on the Simple Gaming Product template

Creating a Rich Gaming Product Template

1. In the Site Builder, click on **Template Gallery** in the navigation pane.
2. Navigate to Templates/CS2000/Authoring/Products.
3. In the "Products" pane, right click on **Rich Product.**
4. click **Copy.**
5. In the menu bar, click **Edit**, then **Paste.**

   A new copy of Rich Product appears. Notice that its status is "Saved". Before approving it, you will make a change to the HTML.
6. Right click it, and rename it Rich Gaming Product.

Editing the new template

1. Right click **Rich Gaming Product.**
2. Click **Edit Template HTML**

   A design palette and HTML editor will open up, displaying the HTML for this template.
3. Locate the following code:

```
<tr valign="top">
          <td>
              <table border="0" cellpadding="0" cellspacing="0">
```

```
                    <tr>
                        <td colspan="5"><% Call CS_RenderTrailForProduct() %></td>
                    </tr>
```

4. Change it to:

```
<tr valign="top">
          <td bgcolor="PaleGreen">
              <table border="0" cellpadding="0" cellspacing="0">
                  <tr>
                      <td colspan="5"><% Call CS_RenderTrailForProduct() %></td>
                  </tr>
```

5. Save the change in your HTML editor and close the Design Palette.
6. In site Builder, highlight your new template and click **Approve** on the toolbar.
7. If you wish, you can preview the template to see the change in color:
   - right click the template
   - click Preview
   - in the template preview window, select view in **WBC Authoring Mode**
   - close the Preview window.

Creating and editing a Simple Gaming Product template

This template is created with the same steps as above. Here is a summary of the steps:

1. Navigate to Templates/CS2000/Site Design/Products/**Simple Product**
2. Copy and paste Simple Product
3. Rename it Simple Gaming Product
4. Edit the new template HTML
5. Change the color of the table to “light blue” by changing this code:

```
<tr valign="top">
          <td bgcolor="LightBlue">
```

6. Save the change in your HTML editor and close the Design Palette.
7. Approve the template and preview the change if you wish.

Creating a new page and posting

In order to prepare the new gaming channel—with a different look—for initial input of products from the catalog, it is necessary to create a new page using the Simple Gaming Product template you just created. You will name it defaultGaming. You will then approve the new default page, which will create a Posting in the gaming channel.

Information on page creation can be found in:

- *MSCMS 2001 Tutorial*
- *MSCMS 2001 Site Administrator's guide.*

Creating a new page

1. In the Site Builder, navigate to the Gaming Devices folder.
2. Right click on the folder and select **New > Page**.

   The Select Template window opens.
3. Navigate to CS2000 > Site Design > **Products** and select the **Simple Gaming Product** template.
4. Click **OK**.

   A new simple page opens up. Notice the blue background.
5. Close the new page,
6. Click Yes to save changes and name the page **defaultGaming**.
7. Click Save.

Creating the posting

Now you will publish the page by creating a posting from it.

1. In Site Builder, right click on **defaultGaming** and select New Posting.

   A new posting window opens.
2. Click OK.
3. Approve your page by clicking on the **Approve** icon on the toolbar, or by right clicking the page and selecting **Approve**.
4. Go to Channels to see the new posting of the page, located in Gaming Devices.



Note
The final step in this process is to map these new channels, templates and postings from the Business Desk.

Mapping

In order for you to be able to access the correct portions of your site, you need to map new channels, templates and Simple Product postings.

Mapping products to a specific channel will give the Business Manager more control over the site. For example, you could restrict access to that channel for authoring, or make the channel hidden except to those who have access rights. This can be done as a step in the creation process.

However, in order to link the Business Desk to the site, you need to do this mapping in the Business Desk itself. Mapping is done in the Category Properties of the Catalog Editor as shown below:

Mapping in the Business Desk



When the “Gaming Devices” mapping is complete, Content Management Server pages created for gaming devices will get created in the “Gaming Devices” folder, using the template created for that channel.

Tip
To avoid typing errors, you may want to cut and paste this path by right clicking on the channel in the Site Builder and copying the path from the “properties” window. The path and file name must be precisely right.

Mapping the Gaming Device channel

The channel path is:

/Channels/CS2000/Products/Hardware/Gaming Devices

1. In the Business Desk, expand “Catalogs” and select **Catalog Editor**.

2. Click the **Hardware** catalog and click **Open Catalog** on the toolbar.
3. Expand "Categories" and click **Gaming Devices** in the "Categories" pane**.**
4. Click **Edit** below this pane. The "Gaming Devices" Catalog Editor opens.
5. Expand "Category Properties".
6. In the "RichProductChannel" field type the full path to the Gaming Devices Channel.

Mapping Simple Product Postings

Now map the Simple Product Posting. Its full path is:
/Channels/CS2000/Products/Hardware/Gaming Devices/defaultGaming.

7. In the "SimpleProductPosting" field type the full path to the Product Detail simple posting.

Mapping Rich Product Templates

The full path to this template is:
/Templates/CS2000/Authoring/Products/Rich Gaming Product.

8. In the "RichProductTemplate" field type the full path to the Gaming Device product template.
9. Click **Save and Back to Catalog Properties** on the toolbar.
10. Finally, update the catalog:
    - in Catalog Editor highlight Hardware
    - click Update Catalog in the toolbar.

Viewing the results

You will create a Rich Product page for a Gaming Device product later. For now, you can check the look of a Simple Gaming Device Product page.

1. Open **Hardware** on the Web Author at **HTTP:// < your server name > /CS2000**.
2. Sign in as *Manager*, password **password**.
3. Click **Switch to edit mode** in the navigation area.
4. Click on **Products** in the navigation area.
5. In the Browse window, click on **Hardware**, then **Gaming Devices**.
6. Open any product page.

   Notice the blue background, indicating that you are using the correct Gaming Device template. All other Simple Product pages have a yellow background.

Enriching your Product pages

A major factor in enticing people to return to your site regularly is to make the content appealing to them. For example, people shopping for a new tent will look for useful information about tents—how to waterproof them, or what differences there are between three and four season tents. Perhaps they might like to look for good campsites in their area.

If they then buy a tent on your site, the value of cross-referencing editorial content with the e-commerce content will have paid off.

The product catalog manager has the role and rights to manage this content. You will log in as *Manager*, to add a new Gaming Device to the existing line of products.

Every product has a simple page that it will use unless a rich page has been designated. The Business Manager can optionally choose not to show simple pages on the web site. However, simple pages are always available in Web Author edit mode.

Product pages have “required” and “optional” properties that are defined using the Business Desk.

Rich Product pages allow you, as the Business Manager, to include links and information as you see fit, to enrich the product page.

Advantages of a Rich Product page:

- it contains placeholders, that offer all the flexibility of Content Management Server page content management
- it allows rich HTML content about the product
- it allows control over graphics
- it creates links to pages containing related material.

If a situation arises where a registered user requests information on the Aspect SL4 product while the enriched page is in production or has been approved but not yet published, the request will revert to the original Simple Product page.

Simple Product page

As we have discussed, every product must have a Simple Product page from which a Rich Product page can be created. The Business Manager decides whether Simple Product pages will be visible on the live site. This decision is usually made at the planning stage and the setup would probably only be done once. Simple Product pages are, however, always visible in edit mode.

The new catalog is currently set up so that Simple Product pages are visible in live mode. This can be changed so that only Rich Product pages are seen on the live site.

You will now view the pages currently visible in live mode. After you have created some Rich Product pages you will learn how to view only Rich Product pages on the live site.

Viewing Product pages visible on the live site

1. Open **Hardware** on the Web Author at **HTTP:// < your server name > /CS2000**.
2. Sign in as *Manager*, password **password**.
3. Click on **Products** in the navigation area.
4. In the Browse window, click on the **Hardware** catalog.

   Notice all the products that can be seen. Each Simple Product page has a tag beside it saying "...Make this a Rich Product". Since this is a new catalog, there are no Rich Product pages yet.
5. Close the browser.

Rich Product page

You can now create several Rich Product pages using the Web Author.

For some pages, use products in the Gaming Device category. These pages will appear in the Gaming Devices folder because you have just mapped that category to do so. For other pages, use products from the Keyboard category. These pages will appear in the Hardware folder since it is in a category that does not have its own subfolder.

To create these pages you will log in as *Author1*. You will then edit and approve some pages from the Business Desk

Creating a Rich Product page from Web Author

So that you can approve and publish this new page immediately, you will create it as an editor.

1. Log in to the Web Author as *Editor1*, password **password**.
2. Navigate to the **Hardware** catalog.
3. Click on Gaming Devices *if you are making a Rich Gaming Product page.*
4. Click **Switch to edit mode**.

   All the links to simple pages have "Make this a Rich Product" displayed beside them.
5. Click on a link to a Simple Product page, or on **Make this a Rich Product** beside that link**.**

   The page contains the basic information about the product. The background will be yellow or blue, depending on the Simple Product you chose.



Note

If your product is a Gaming Device, the single template you created for the Gaming Devices channel opens and you do not need to select from a template gallery.

If your product is a Hardware product, a template gallery opens. Select the appropriate template.

The background of the Rich Product page will be either yellow or green, depending on the category of the product you chose.

6. In the Tools menu, click **Make this a Rich Product**.
7. Add an image to the page:
   - click **Add or Edit Image** in the image placeholder
   - find a Resource Galley with an image you want to use
   - click **Select** beside an image
   - click **Okay**—you will not create a hyperlink at this time.

The image appears in the placeholder.

8. Add some suitable content in the text placeholder—you can cut and paste from a Word document or text file if you wish.
9. When you have finished, click **Save and Exit** in the Tools menu.
10. In the "Create New Page" window, give your page a name which reflects the product—this appears as the heading on your new page.
11. Click **OK**.

    Recall that if you were to set some Page Properties, you would do so by selecting "Page Properties" from the Tools menu—however, you do not need to do so for this procedure.

    Notice that the status of your page is "Waiting for Editor approval"
12. Click **Publish** on the Tools menu.
13. Click **Switch to Live Mode**.
14. Return to the Hardware or Gaming Devices page.

    Notice that the link to your product now has a picture beside it, indicating that it is a Rich Product.
15. Click the link to view your new Rich Product page.

    The background will be yellow or green depending on the product you chose.

Note
When deleting a Rich Product page, delete it from the Business Desk or the Web Author so that its profile is also deleted.

Making Rich Product pages visible on the live site

1. Open **Hardware** on the Web Author at **HTTP:// < your server name > /CS2000**.
2. Sign in as *Manager*, password **password**.
3. Click on **Products** in the navigation area.

   Notice that Simple Product pages are visible in live mode.
4. Minimize the browser.

Change the setting using commerce Server Manager

5. Run Commerce Server Manager from your desktop.
6. Navigate to **Commerce Sites > MethodSystems > Site Resources > Content Connector.**
7. Right-click on **Content Connector** and select **Properties**.
8. Click **RichProductsOnly** and change the setting from **0** to **1**.
9. From Start on your desktop, run **iisreset**.
10. Maximize the browser and refresh the view.

*Switch back to Commerce Server Manager and reset "RichProductsOnly" to **0** and run iisreset again.*

Searching for Products in the Business Desk

There are several search options available to you. You may wish to try them out as you are working in the Business Desk. They are:

- search by product type:
  - Simple Product page
  - Rich Product page
  - any
- search by Properties
- full text search
- browse catalog.

Editing and approving a Rich Product page using the Business Desk

You will now change and approve a page that was created by another user—perhaps an author or another editor.

1. Open the Business Desk if you do not have it open already.
2. Expand "Content" on the Business Desk navigation area and click **Product pages**.
3. From the "Catalog" drop-down list, select **Hardware**.
4. In the "Page Selection" field select "**Rich Products Only**". Click **Find Now**.

   A list of all rich products displays. Since this is a new catalog, this will only contain the pages you created.
5. Select a Rich Product page.
6. Click **Go to the Selected Product page** on the toolbar.
7. A Web Author login window opens.
8. Log in as *editor1*, password **password**.

   The Web Author opens on the Rich Product page you requested.

   You are in Edit Mode.
9. In the Tools menu, click **Page Properties**.
10. In the Page Properties window, click the **Page Profile** tab.
11. Change Product Focus to "Servers"
12. Check the **Special** checkbox.
13. Click **Save Changes**.
14. In the Tools menu, click **Save and Exit**
15. In the Tools menu, click **Approve**.

16. From the Business Desk:
    - click Targeting
    - click Publish PCOs
    - highlight the application in the Publish PCOs pane
    - click **Refresh Cache** in the toolbar.
17. Click **Switch to live mode** to see the changes you made.
18. Close the browser.

Viewing the results

You can now visit the site as a guest.

1. Open a browser.
2. Go to the home page at **http:// < servername > /CS2000**.

   You will see the new product which you just made into a Special.

Module 8

Tutorial wrap up

Wrap up

In this tutorial, we covered the following topics:

Preparing to use the MSCMS Content Connector tutorial

- who should use this tutorial
- overview of topics.

Tutorial setup

- software and setup requirements
- preparing user IDs.

Content Connector

- Content Connector overview
- MSCMS 2001 Architecture
- the different User types
- adding and logging in as a registered User.

Commerce Server

- Commerce Server overview
- introduction to Business Desk components
- targeting an advertising campaign using the Business Desk
- explaining and creating Site Terms
- explaining and creating User Profiles and Profile Properties
- targeting Users with Campaign Expressions
- targeting an advertisement
- viewing the results.

Page profiling

- explaining and creating Page Profiles and their properties
- creating a news page and profile
- editing your news page using the Web Author and the Business Desk.

Personalized content objects

- explaining the components of a PCO
- explaining and creating content targeting
- blending and scoring
- defining, filtering and targeting the context
- creating PCOs
- viewing the results.

Product pages

- importing a catalog
- creating channels and folders for the new catalog
- setting up customized templates
- creating a new page and posting
- mapping to your new channels from the Business Desk
- creating and viewing simple and rich product pages
- editing your work.

Reference materials

To learn more about MSCMS 2001 and the material covered in this tutorial, refer to the following user guides:

- *MSCMS 2001 Setup Guide*
- *MSCMS 2001 Business Desk User Guide*.
- *MSCMS 2001 Page Template Designer's Guide*: provides details about all aspects of creating and publishing page templates using MSCMS 2001.
- *MSCMS 2001 Site Administrator's Guide*: assists site administrators in the technical setup at the customer Web site using MSCMS 2001.
- *MSCMS 2001 Readme file*: includes release notes information.