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# 1 Introduction to personalization

Personalized components - this can be single or multiple components – can be used for active and passive personalization. Active personalization is based on the visitors profile that is determined after a login, while passive personalization determines the behavior of a visitor on the website to determine its profile.

The system uses the session handling of the respective application for personalization. This applies to Java Server Pages or Java, Active Server Pages and the PHP Hypertext Preprocessor.

Depending on the applications technology on the presentation layer you have to define the personalization profiles depending on the selected programming language.

The system typically uses the session handling or cookies for personalization and the storage of properties of a visitors profile. The variables which describe the user profile will be passed from page to page by means of the Hypertext Transfer Protocol (HTTP). When creating a page template the Customer Tracking can be integrated. This allows the editor to set a specific Customer Tracking for a page that evaluates a visitor based on passive personalization and therefore defines the users profile.

A personalized component can have conditions. Only if the specified conditions are satisfied, the component will be included in the page. These conditions are defined in the Customer Profile. An editor, which integrates a custom component in his page, must therefore select a Customer Profile. Only visitors that match the profile gain insight on the personalized content.

The definition and manipulation of session variables and cookies in the Customer Tracking is freely definable. The conditions for the values of the session variables are stored in the Customer Profile and come in use when components will be integrated in pages.

**The following example in PHP explains the personalization based on a potential customer profile:**

The visitor can have the following properties, which could be provided actively after a login:

Variable	Values	Description
\$customer	„private“ „business“	Is it a private or business customer?
\$region	„Asia“ „CEE“ „Europe“ „USA“	Where is the customer from?

Navigates a visitor with the profile `$customer = "private"` and `$region = "Europe"` through the website, these two variables are passed by a session (Customer Tracking). If the user visits a page that holds a personalized component, certain conditions need to be met for the integration of the component in the page (Customer Profile). A component that is only available or interesting for private customers would define the condition `$customer == "private"` in the Customers Profile. If the condition is met the user will be able to see the component. Another component should be displayed only if the following conditions are satisfied in the Customers Profile: `$customer == "private"` and `$region == "CEE"` or `$region == "Asia"`. In this case, the visitor could not see the component, since the region of his profile is set to "Europe". You can use logical operators (AND, OR) in the context of defining these conditions.

**Once again the notation:**

In the first example:  
`$customer == "private"`

In the second example:  
`$customer == "private" AND ($region == "CEE" OR $region == "Asia")`

Note that a "is equal to" is expressed by double `=`.  
Non-numeric values of variables need always be enclosed in quotation marks, eg `$region == "Asia"`. Numerical values are presented without any quotes, for example `$counter >= 1`  
Using numbers for values comparison operators can be applied.

The following tables are intended to give an overview based on PHP:

### Arithmetic Operators

Example	Name	Result
$\$a + \$b$	Addition	Sum of \$a and \$b.
$\$a - \$b$	Subtraction	Subtraction of \$b from \$a.
$\$a * \$b$	Multiplication	Multiplication of \$a times \$b.
$\$a / \$b$	Division	\$a divided by \$b.
$\$a \% \$b$	Modulus	Rest of \$a divided by \$b.

### Comparison Operators

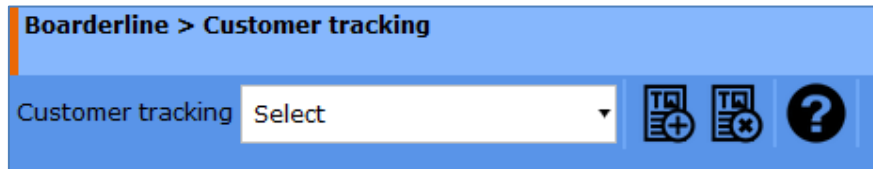
Example	Name	Result
$\$a == \$b$	equal	Returns <b>TRUE</b> , if \$a and \$b are equal.
$\$a === \$b$	identical	Returns <b>TRUE</b> zurück wenn \$a gleich \$b ist und beide vom gleichen Typ sind(funktioniert nur in PHP4)
$\$a != \$b$	unequal	Returns <b>TRUE</b> , if \$a and \$b are not equal.
$\$a < \$b$	less than	Returns <b>TRUE</b> , if \$a is less than \$b.
$\$a > \$b$	greater than	Returns <b>TRUE</b> , if \$a is greater than \$b.
$\$a <= \$b$	less than or equal	Returns <b>TRUE</b> , if \$a is less than \$b.
$\$a >= \$b$	greater than or equal	Returns <b>TRUE</b> , if \$a greater than or equal \$b.

### Logical Operators

Example	Name	Result
$\$a \text{ AND } \$b$	Und	<b>TRUE</b> if \$a and also \$b is <b>TRUE</b> .
$\$a \text{ OR } \$b$	Oder	<b>TRUE</b> if \$a or \$b is <b>TRUE</b> .
$\$a \text{ XOR } \$b$	Entweder Oder	<b>TRUE</b> if \$a or \$b is <b>TRUE</b> , bot not both of them.
$! \$a$	Nicht	<b>TRUE</b> if \$a is not <b>TRUE</b> .

According to the previous example, a Customer Tracking as well as two Customer Profiles should be defined.

Select the corresponding menu item in the Navigator to access the personalization. After the selection, a toolbar will appear in the work place. When you move the mouse pointer over one of the icons, the name of the action or a short explanation will be displayed:



**You can select the following actions for the Customer Tracking:**

- Select and edit an existing Customer Tracking
- Create a new Customer Tracking
- Remove an existing Customer Tracking

**Or for the Customer Profile:**

- Select and edit an existing Customer Profile
- Create a new Customer Profile
- Remove an existing Customer Profile

## 2 Customer tracking

### 2.1 Creating a new customer tracking

Click on the first icon in the toolbar. A text field will appear that will prompt you for a name of the new Customer Tracking. Provide the name (the name must be unique per publication). Then click the "OK" button.

The new Customer Tracking will be created and the Customer Tracking editor will be opened automatically. You can define or declare the corresponding variables in the text area of the editor. The help page can be opened by clicking on the ?-icon. Note that the input of the application-specific tags (<%%> or <? ?>) is not necessary.

**To continue the previous example, we enter the following code:**

The values of the variables are passed by the application after the visitor logs on using a form. We examine whether the variables were passed correctly and read their values from a cookie, or we set default values if no values were set:

```
if (isset ($customer))
{
    $customer = $_COOKIE['customer'];
    if ($customer == „") $customer = "private";
}

if (isset ($region))
{
    $region = $_COOKIE['Region'];
    if ($region == "") $region="Europe";
}
```

Register the variables in the session:

```
session_register ("customer","region");
```

In addition, we can also set a cookie that is stored on the client/browser. Thus, the customer can be detected even at later visits of the site:

```
setcookie ('customer', $customer, time() + 31536000);
setcookie ('region', $region, time() + 31536000);
```

More details about the used PHP functions can be found at:  
<http://www.php.net>

As a reference for JSP/Java, please visit:  
<http://java.sun.com>

As a reference for ASP/Visual Basic Script/C# please visit:  
<http://msdn.microsoft.com>

After the coding the Customer Tracking can be saved.

## 2.2 Remove a customer tracking

Before you use this function, you need to be sure that you no longer need the Customer Tracking. If it is still in use in some pages, it will no longer appear after publishing these pages. The existing publication and its pages however remain unchanged.

To remove a Customer Tracking, click the second icon on the toolbar. After that, a select box appears in the workspace. Here you can select the Customer Tracking to be deleted and consult it again in the preview. To delete the item permanently you need to press the "OK" button.

## 2.3 Edit a customer tracking

To edit an existing Customer Tracking, click on the third icon and select the desired entry. The code appears in the editor and can be edited. Any changes will be applied only after publishing the pages which use the selected Customer Tracking.



## 3 Customer profile

### 3.1 Create a new customer profile

Click on the first icon in the toolbar. A text field will appear that prompts you to enter a name for the new Customer Profile. Provide the name (the name must be unique per publication), then click the "OK" button.

The new Customer Profile will be created and the Customer Profile editor will be opened. You can define the conditions in the text area of the editor. The help page can be opened by clicking on the ?-icon.

**To continue the previous example, we enter the following code:**

We want to define a profile for private customers from Europe and therefore write the following code in the editor:

```
$customer == „private“ AND $region == „Europe“
```

After that the Customer Profile need to be saved.

We create another Customer Profile using a new name for private customers from Asia and define these conditions:

```
$customer == „private“ AND $region == „Asia“
```

After that the Customer Profile need to be saved.

This editor can select the created Customer Profiles when adding components to a page. The selected profile will be used to personalize the content of the page.

### 3.2 Remove a customer profile

Before you use this function, you need to be sure that you no longer need the Customer Profile. Is it still in use in some pages, it would no longer appear after publishing these pages. The existing publication and its pages however remain unchanged.

To remove a Customer Profile, click the second icon on the toolbar. After that, a select box appears in the workspace. Here you can select the Customer Profile to be deleted and consult it again in the preview. To delete the item permanently you need to press the "OK" button.

### 3.3 Edit a customer profile

To edit an existing Customer Profile, click on the third icon and select the desired entry. The code appears in the editor and can be edited. Any changes will be applied only after publishing the pages which use the selected Customer Profile.

## 4 Legal reference / flag

### 4.1 Questions and suggestions

For advanced questions and suggestions, please contact the support.

**hyperCMS Support:**

[www.hypercms.com](http://www.hypercms.com)

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### 4.2 Imprint

Responsible for the content:

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### 4.3 Legal information

The present product information is based on the version of the program, which was available at the time the document was composed.

The maker reserves the rights of modifications and corrections of the program. Errors and misapprehension accepted.

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