

# COREMEDIA CONTENT CLOUD

## Personalization Hub Manual



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# 1. Preface

CoreMedia Content Cloud supports two different methods of personalization, which provide the basis for creating personalized websites. In both cases, Studio allows you to create personalization content that selects content to be displayed.

- Client-side Personalization
- Adaptive Personalization which runs on server-side

You should start with reading the overview section to understand the basic concepts and scenarios underlying Adaptive Personalization and Client-side Personalization. Then, jump to the section that concerns you the most as they are self-contained and don't need to be read in order.

- In [Chapter 2, Overview \[14\]](#) you will get an overview over the aim and features of Adaptive Personalization and Client-side Personalization.
- In [Chapter 3, Adaptive Personalization \[15\]](#) you will learn how to configure Adaptive Personalization and how to develop your own extensions.
- In [Chapter 4, Client-side Personalization \[59\]](#) you will learn, how to install and configure Client-side Personalization.
- In [Chapter 5, Reference \[91\]](#) you will find the supplied context sources, condition types and content types for Adaptive Personalization.

# 1.1 Audience

This manual is intended for all technical users of *CoreMedia Personalization Hub* that is administrators and developers. Administrators should have read the *CoreMedia Operations Basics Manual* to have basic knowledge of the administration of CoreMedia components. Developers should be familiar with CAE development as it is described in the *CoreMedia Content Application Developer Manual* and with the customization of *CoreMedia Studio*. The use of *CoreMedia Personalization Hub* is described in the [Chapter 7, Working with Personalized Content](#) in *Studio User Manual*.






## 1.2 Typographic Conventions

CoreMedia uses different fonts and types in order to label different elements. The following table lists typographic conventions for this documentation:

Element	Typographic format	Example
Source code	Courier new	<code>cm systeminfo start</code>
Command line entries		
Parameter and values		
Class and method names		
Packages and modules		
Menu names and entries	Bold, linked with	Open the menu entry <b>Format Normal</b>
Field names	Italic	Enter in the field <i>Heading</i>
CoreMedia Components		The <i>CoreMedia Component</i>
Applications		Use <i>Chef</i>
Entries	In quotation marks	Enter "On"
(Simultaneously) pressed keys	Bracketed in "<>", linked with "+"	Press the keys <Ctrl>+<A>
Emphasis	Italic	It is <i>not</i> saved
Buttons	Bold, with square brackets	Click on the <b>[OK]</b> button
Code lines in code examples which continue in the next line	\	<code>cm systeminfo \ -u user</code>

Table 1.1. Typographic conventions

In addition, these symbols can mark single paragraphs:

Pictograph	Description
	Tip: This denotes a best practice or a recommendation.
	Warning: Please pay special attention to the text.
	Danger: The violation of these rules causes severe damage.

*Table 1.2. Pictographs*

## 1.3 CoreMedia Services

This section describes the CoreMedia services that support you in running a CoreMedia system successfully. You will find all the URLs that guide you to the right places. For most of the services you need a CoreMedia account. See [Section 1.3.1, "Registration" \[5\]](#) for details on how to register.

### NOTE

CoreMedia User Orientation for CoreMedia Developers and Partners

Find the latest overview of all CoreMedia services and further references at:

<http://documentation.coremedia.com/new-user-orientation>



- [Section 1.3.1, "Registration" \[5\]](#) describes how to register for the usage of the services.
- [Section 1.3.2, "CoreMedia Releases" \[6\]](#) describes where to find the download of the software.
- [Section 1.3.3, "Documentation" \[7\]](#) describes the CoreMedia documentation. This includes an overview of the manuals and the URL where to find the documentation.
- [Section 1.3.4, "CoreMedia Training" \[10\]](#) describes CoreMedia training. This includes the training calendar, the curriculum and certification information.
- [Section 1.3.5, "CoreMedia Support" \[10\]](#) describes the CoreMedia support.

### 1.3.1 Registration

In order to use CoreMedia services you need to register. Please, start your [initial registration via the CoreMedia website](#). Afterwards, contact the CoreMedia Support (see [Section 1.3.5, "CoreMedia Support" \[10\]](#)) by email to request further access depending on your customer, partner or freelancer status so that you can use the CoreMedia services.

## 1.3.2 CoreMedia Releases

### Downloading and Upgrading the Blueprint Workspace

CoreMedia provides its software as a Maven based workspace. You can download the current workspace or older releases via the following URL:

<https://releases.coremedia.com/cmcc-12>

Refer to our [Blueprint Github mirror repository](#) for recommendations to upgrade the workspace either via Git or patch files.

#### NOTE

If you encounter a 404 error then you are probably not logged in at GitHub or do not have sufficient permissions yet. See [Section 1.3.1, "Registration" \[5\]](#) for details about the registration process. If the problems persist, try clearing your browser cache and cookies.



### Maven artifacts

CoreMedia provides parts of its release artifacts via Maven under the following URL:

<https://repository.coremedia.com>

You have to add your CoreMedia credentials to your Maven settings file as described in section [Section 3.1, "Prerequisites"](#) in *Blueprint Developer Manual*.

### npm packages

CoreMedia provides parts of its release artifacts as npm packages under the following URL:

<https://npm.coremedia.io>

Your pnpm client first needs to be logged in to be able to utilize the registry (see [Section 3.1, "Prerequisites"](#) in *Blueprint Developer Manual*).

### License files

You need license files to run the CoreMedia system. Contact the support (see [Section 1.3.5, "CoreMedia Support" \[10\]](#)) to get your licences.

## 1.3.3 Documentation

CoreMedia provides extensive manuals, how-tos and Javadoc as PDF files and as online documentation at the following URL:

<https://documentation.coremedia.com>

The manuals have the following content and use cases:

Manual	Audience	Content
Adaptive Personalization Manual	Developers, architects, administrators	This manual describes the configuration of and development with <i>Adaptive Personalization</i> , the CoreMedia module for personalized websites. You will learn how to configure the GUI used in <i>CoreMedia Studio</i> , how to use predefined contexts and how to develop your own extensions.
Analytics Connectors Manual	Developers, architects, administrators	This manual describes how you can connect your CoreMedia website with external analytic services, such as Google Analytics.
Blueprint Developer Manual	Developers, architects, administrators	This manual gives an overview over the structure and features of <i>CoreMedia Content Cloud</i> . It describes the content type model, the <i>Studio</i> extensions, folder and user rights concept and many more details. It also describes administrative tasks for the features.  It also describes the concepts and usage of the project workspace in which you develop your CoreMedia extensions. You will find a description of the Maven structure, the virtualization concept, learn how to perform a release and many more.
Connector Manuals	Developers, administrators	This manuals gives an overview over the use cases of the eCommerce integration. It describes the deployment of the Commerce Connector and how to connect it with the CoreMedia and eCommerce system.
Content Application Developer Manual	Developers, architects	This manual describes concepts and development of the <i>Content Application Engine [CAE]</i> . You will learn how to write Freemarker templates that access the other CoreMedia modules and use the sophisticated caching mechanisms of the CAE.

Manual	Audience	Content
Content Server Manual	Developers, architects, administrators	This manual describes the concepts and administration of the main CoreMedia component, the <i>Content Server</i> . You will learn about the content type model which lies at the heart of a CoreMedia system, about user and rights management, database configuration, and more.
Deployment Manual	Developers, architects, administrators	This manual describes the concepts and usage of the CoreMedia deployment artifacts. That is the deployment archive and the Docker setup. You will also find an overview of the properties required to configure the deployed system.
Elastic Social Manual	Developers, architects, administrators	This manual describes the concepts and administration of the <i>Elastic Social</i> module and how you can integrate it into your websites.
Frontend Developer Manual	Frontend Developers	This manual describes the concepts and usage of the Frontend Workspace. You will learn about the structure of this workspace, the CoreMedia themes and bricks concept, the CoreMedia Freemarker facade API, how to develop your own themes and how to upload your themes to the CoreMedia system.
Headless Server Developer Manual	Frontend Developers, administrators	This manual describes the concepts and usage of the <i>Headless Server</i> . You will learn how to deploy the Headless Server and how to use its endpoints for your sites.
Importer Manual	Developers, architects	This manual describes the structure of the internal CoreMedia XML format used for storing data, how you set up an <i>Importer</i> application and how you define the transformations that convert your content into CoreMedia content.
Multi-Site Manual	Developers, Multi-Site Administrators, Editors	This manual describes different options to design your site hierarchy with several languages. It also gives guidance to avoid common pitfalls during your work with the multi-site feature.

Manual	Audience	Content
Operations Basics Manual	Developers, administrators	This manual describes some overall concepts such as the communication between the components, how to set up secure connections, how to start application.
Search Manual	Developers, architects, administrators	This manual describes the configuration and customization of the <i>CoreMedia Search Engine</i> and the two feeder applications: the <i>Content Feeder</i> and the <i>CAE Feeder</i> .
Studio Developer Manual	Developers, architects	This manual describes the concepts and extension of <i>CoreMedia Studio</i> . You will learn about the underlying concepts, how to use the development environment and how to customize <i>Studio</i> to your needs.
Studio User Manual	Editors	This manual describes the usage of <i>CoreMedia Studio</i> for editorial and administrative work. It also describes the usage of the <i>Adaptive Personalization</i> and <i>Elastic Social</i> GUI that are integrated into <i>Studio</i> .
Studio Benutzerhandbuch	Editors	The Studio User Manual but in German.
Supported Environments	Developers, architects, administrators	This document lists the third-party environments with which you can use the CoreMedia system, Java versions or operation systems for example.
Unified API Developer Manual	Developers, architects	This manual describes the concepts and usage of the <i>CoreMedia Unified API</i> , which is the recommended API for most applications. This includes access to the content repository, the workflow repository and the user repository.
Utilized Open Source Software & 3rd Party Licenses	Developers, architects, administrators	This manual lists the third-party software used by CoreMedia and lists, when required, the licence texts.
Workflow Manual	Developers, architects, administrators	This manual describes the <i>Workflow Server</i> . This includes the administration of the server, the development of workflows using the XML language and the development of extensions.

Table 1.3. CoreMedia manuals

If you have comments or questions about CoreMedia's manuals, contact the Documentation department:

Email: [documentation@coremedia.com](mailto:documentation@coremedia.com)

## 1.3.4 CoreMedia Training

CoreMedia's training department provides you with the training for your CoreMedia projects either live online, in the CoreMedia training center or at your own location.

You will find information about the CoreMedia training program, the training schedule and the CoreMedia certification program at the following URL:

<http://www.coremedia.com/training>

Contact the training department at the following email address:

Email: [training@coremedia.com](mailto:training@coremedia.com)

## 1.3.5 CoreMedia Support

CoreMedia's support is located in Hamburg and accepts your support requests between 9 am and 6 pm MET. If you have subscribed to 24/7 support, you can always reach the support using the phone number provided to you.

To submit a support ticket, track your submitted tickets or receive access to our forums visit the CoreMedia Online Support at:

<http://support.coremedia.com/>

Do not forget to request further access via email after your initial registration as described in [Section 1.3.1, "Registration" \[5\]](#). The support email address is:

Email: [support@coremedia.com](mailto:support@coremedia.com)

### Create a support request

CoreMedia systems are distributed systems that have a rather complex structure. This includes, for example, databases, hardware, operating systems, drivers, virtual machines, class libraries and customized code in many different combinations. That's why CoreMedia needs detailed information about the environment for a support case. In order to track down your problem, provide the following information:

*Support request*



- Which CoreMedia component(s) did the problem occur with (include the release number)?
- Which database is in use (version, drivers)?
- Which operating system(s) is/are in use?
- Which Java environment is in use?
- Which customizations have been implemented?
- A full description of the problem (as detailed as possible)
- Can the error be reproduced? If yes, give a description please.
- How are the security settings (firewall)?

In addition, log files are the most valuable source of information.

To put it in a nutshell, CoreMedia needs:

*Support checklist*

1. a person in charge (ideally, the CoreMedia system administrator)
2. extensive and sufficient system specifications
3. detailed error description
4. log files for the affected component(s)
5. if required, system files

An essential feature for the CoreMedia system administration is the output log of Java processes and CoreMedia components. They're often the only source of information for error tracking and solving. All protocolling services should run at the highest log level that is possible in the system context. For a fast breakdown, you should be logging at debug level. See [Section 4.7, "Logging"](#) in *Operations Basics* for details.

*Log files*

### Which Log File?

In most cases at least two CoreMedia components are involved in errors: the *Content Server* log files together with the log file from the client. If you know exactly what the problem is, solving the problem becomes much easier.

### Where do I Find the Log Files?

By default, application containers only write logs to the console output but can be accessed from the container runtime using the corresponding command-line client.

For the *docker* command-line client, logs can be accessed using the **docker logs** command. For a detailed instruction of how to use the command, see [docker logs](#). Make sure to enable the timestamps using the `--timestamps` flag.

```
docker logs --timestamps <container>
```

For the *kubectl* command-line client in a Kubernetes environment you can use the **kubectl logs** command to access the logs. For a detailed instruction of how to use the command, see [kubectl logs](#). Make sure to enable the timestamps using the `--timestamps` flag.

```
kubectl logs --timestamps <pod>
```

# 1.4 Changelog

In this chapter you will find a table with all major changes made in this manual.

Section	Version	Description
---------	---------	-------------

*Table 1.4. Changes*

## 2. Overview

CoreMedia Content Cloud supports two different methods of personalization, which provide the basis for creating personalized websites. In both cases, Studio allows you to create personalization content that selects content to be displayed.

- Adaptive Personalization
- Client-side personalization

Adaptive Personalization uses the CAE to deliver personalized content and uses rules defined in the CoreMedia system.

Client-side personalization decides on the user client software (mostly the browser) which content to show. The rules are defined in a third-party system, such as Monetate. [Figure 2.1, "Personalization architecture" \[14\]](#) gives a high-level architectural overview.

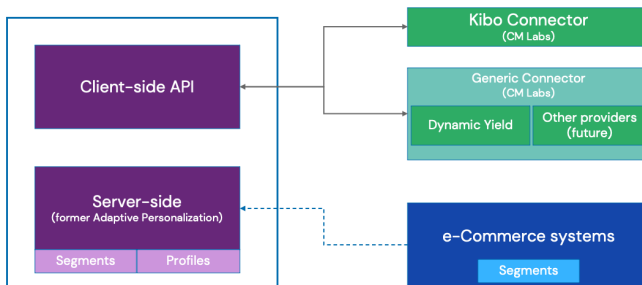


Figure 2.1. Personalization architecture

In this manual, you will find installation, configuration and development information. For the usage of Personalization in Studio refer to [Chapter 7, Working with Personalized Content](#) in *Studio User Manual*,

## 3. Adaptive Personalization

*CoreMedia Adaptive Personalization* provides the basis for creating a personalized web experience on top of the *CoreMedia Content Application Engine*. It offers user interest profile management as well as dynamic content selection - the building blocks for your personalized site, whether you want to implement explicit (manual) personalization, implicit (automatic) personalization, or both.

Personalization is used by leading web companies to increase user engagement by providing a better user experience. Typical examples of website personalization are:

- Showing more relevant ads by taking a user's browsing behavior into account.
- Recommending products on an eCommerce site based on the user's purchase history.
- Automatically listing the most common answers on a support site for the operating system and browser used by the current user.
- Selecting news stories for a user by analyzing the user's reading history.
- Ranking search results for an individual user based on his personal search history.

The underlying idea of all these examples is to be more relevant to the individual user. With personalized content, you can increase the satisfaction and loyalty of your users, which leads to higher user retention and number of visits.

# 3.1 Adaptive Personalization Overview

This section gives you an overview of Adaptive Personalization.

## 3.1.1 Example Scenario

*CoreMedia Adaptive Personalization* provides everything you need to implement rule-based personalization for your website out of the box. But what does this mean, exactly? Here's a simple example:

Assume you're the editor of a news site and there's a single main teaser region on your entry page. You know that placing a relevant teaser in this region is critical as it drives a high percentage of clicks, and more clicks mean more revenue. By inspecting the reports of your analytics system, you've noticed that in the morning, most visitors read *World News*, while during lunch break and in the evenings, interests are more diverse. In particular, you see some visitors focusing on *Lifestyle*, others on *Economy*, and still others on *Sports*. You decide to optimize your entry page by placing a *Personalized Content* in the main teaser region. This content item is configured to show the most important (as defined by the editorial team) article in *World News* each morning until 10am. At 10am, it switches to another *Personalized Content* that selects the most important teaser from *Lifestyle*, *Economy*, or *Sports* depending on the interests of the current user. If *CoreMedia Adaptive Personalization* is installed in your site, you can do all of this without the need to do any programming or to redeploy the system.

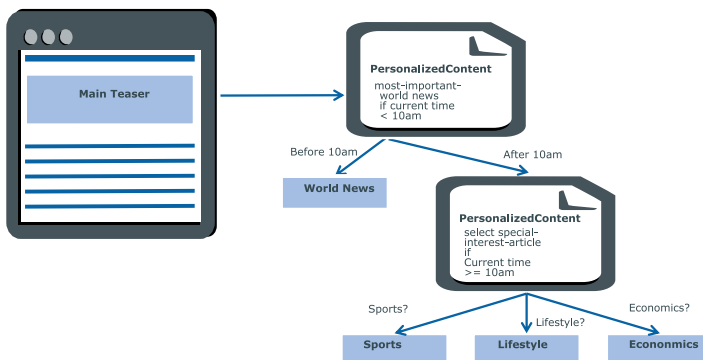


Figure 3.1. Example Page with Main Teaser

Have a quick look at the components of *CoreMedia Adaptive Personalization* that would be used to implement a system that supports this scenario. Detailed descriptions of the components can be found in the corresponding chapters within this manual.

All context data for a request, containing the current time of day, is stored within the *CAE* in a `ContextCollection`. If you tag your pages with keywords, as is typically the case if you use an ad server, you can use a `ScoringContext` in combination with the `KeywordInterceptor` to track the most often seen keywords for each user (if he read a lot of articles tagged with 'Sports', 'Sports' will have a large score in the context).

*Personalized Content* contains a list of rules of the form *select content X if the contexts satisfy conditions Y*. Given a `ContextCollection`, it renders the first content for which the conditions are satisfied. So in the scenario above, the main teaser would contain the rules *select most-important-world-news if current time < 10am* and *select special-interest-article if current time >= 10am*. The content *most-important-world-news* could use a search to determine the most current, highly rated editorial article from *World News*, while *special-interest-article* would be another *Personalized Content* selecting articles based on the users' keyword scores, for example *select most-important-sports-news if score of 'Sports' > 0.8*. These *Selection Rules* are defined from within *CoreMedia Studio* using a specialized editor component and are deployed to the *CAEs* via content item publication, so there's no need for any code changes.

### 3.1.2 Architectural Overview

*CoreMedia Adaptive Personalization* is a collection of building blocks intended to assist you in leveraging the versatility of the *CAE* to implement dynamic and personalized content delivery. The basic idea is that each request to the site by a visitor is associated with context data and that this data is used to determine what is to be delivered to the visitor.

Contexts represent arbitrary things about the user and his environment, such as the user's current interests, the location from which the user accesses the site, and the device used. A context can also contain general information such as the current date and time or the day of the week.

To determine the content to be delivered, *CoreMedia Adaptive Personalization* provides the implementation of a rule-based approach ("select some specific content if the context data fulfills some requirements") as well as an extension to the search engine integration that allows using context data within search queries.

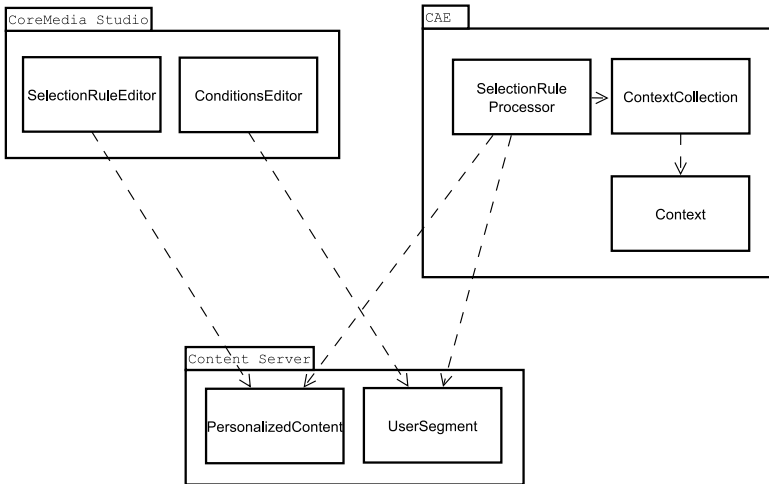


Figure 3.2. Architectural overview

To configure rule-based personalization and define customer segments, *CoreMedia Adaptive Personalization* includes *CoreMedia Studio* components that provide corresponding editing functionality for editors. All configurations are stored within content item properties which are freely configurable - you are not required to use the predefined content types.

Within the CAE, you evaluate rules in a Content Bean implementation using the `SelectionRuleProcessor`. The processor expects to be supplied with a collection of user contexts, which may include all customer segments for which the defined conditions are satisfied by the user.

Not shown in the diagram above is the search engine extension. It provides a query preprocessor that allows you to add macro calls within query strings and evaluate these macros at time of search. For example, if you define a macro `userSegments` that looks up and returns the set of segments the user is a member of and tag your content with segment names which are indexed in field `segments`, you can search for all content items tagged with the segments of the user via the query `segments:userSegments()`.

## 3.1.3 Building Blocks

*CoreMedia Adaptive Personalization* provides the basis for creating a personalized web experience on top of the *CoreMedia Content Application Engine*. This section lists all building blocks with a short description and is intended as an overview for programmers



and technical consultants. See [Section 3.3, “Developing With Adaptive Personalization” \[31\]](#) for a more detailed discussion.

CoreMedia Adaptive Personalization comes with an API that offers five main building blocks:

- Personalized Content
- Customer Segments
- User Contexts
- Test User Contexts
- Behavior tracking

### Personalized Content

Personalized Content is content that uses a list of rules to determine what to show to a visitor. This is similar to content that stores a search query and displays the results of executing the search, but covers different use cases as you've got finer control over the selection process. For example, you can define rules that show different content items.

- ... to users above a certain age AND at specific times of the day.
- ... to users who previously bought a specific service or product.
- ... to users visiting the website with a specific device.
- ... to users who previously showed interest in content tagged by repeated keywords (such as soccer, baseball, travel, politics etc.) through keyword tracking.

Selection rules are stored in a Markup document property using a specific XML grammar. Rules are parsed and evaluated within the *CAE* and all content selected by rules whose conditions are satisfied is returned.

*Adaptive Personalization* provides a *CoreMedia Studio* plug-in with an easy to use interface for users to define personalization criteria. *Adaptive Personalization* comes with a number of predefined condition types that can be bound to arbitrary context parameters, thus allowing you to adapt the UI to the semantics of your application domain. These condition types are described in detail regarding usage and configuration in [Section 5.1, “Condition Types” \[92\]](#).

### Customer Segments

With personalization you can group the visitors of your website into segments according to a set of logical conditions. For example, if a user context (explained below) is provided, you could create visitor segments such as

- Male users aged between 30 and 40 AND with a yearly available income of US\$45,000.
- Users with an interest in the fashion topic AND with at least five social connections within the site's user base.

- Users which have bought a certain number of products through the website correlating with an interest in a specific content topic.

Customer segments are evaluated by a specialized `ContextSource` (a component that adds a context to the `ContextCollection` associated with a request to the CAE) and added to the current user's context data. Thus, they can be used within conditions in selection rules.

The *CoreMedia Studio* plug-in provides an interface to define segments with conditional expressions. As with Personalized Content, the UI can be adapted to your application's needs.

## User Contexts

*CoreMedia Adaptive Personalization* allows you to use arbitrary user contexts as sources of information accessible in conditional criteria of Personalized Content and Customer Segments. A context can be an arbitrary Java object, but usually is a map-like entity that stores key-value pairs. A user's request is associated with an arbitrary number of contexts collected in a `ContextCollection`, which typically is injected in all CAE beans that require access to the context data.

User contexts are populated in the CAE, in the `preHandle` phase of request processing. Thus, context data is available to handlers as well as content beans. The context API also allows you to persist information into user contexts at the end of request processing.

## Test User Contexts

*Test User Contexts* are CMS content items containing lists of context properties. A specialized `ContextSource` reads these content items and adds corresponding context objects to the context collection of each request to the CAE. Using *Test User Contexts*, you can simulate a user having specific context properties and thus test the behavior of your personalized site.

## Behavior Tracking

CoreMedia Adaptive Personalization provides a specialized Context class that is intended for tracking and scoring the behavior of individual users on your site. This `ScoringContext` can be informed about (weighted) events, such as visits to keyword-tagged pages or initiated downloads. The collected weights for an event are combined and the event name as well as its weight are made available as context properties to be used in customer segments or selection rules.

## 3.1.4 Data Privacy Considerations

CoreMedia delivers building blocks as part of the *CoreMedia Adaptive Personalization* add-on module and the respective Blueprint Extensions that enable you to build personalized experiences. CoreMedia provides tooling to facilitate compliance with legal privacy regulations including requests for information, change and deletion of personal data - however establishing compliance remains the responsibility of the customer implementing and operating the product. Depending on whether or where technically you choose to persist personal data of your end users, you may need to seek and document consent from your users and/or establish other legal grounds for use of personal data based on your applicable legal regulations. Any recommendations provided by CoreMedia are not to be established as legal advice or consultation, please contact your legal counsel.

## 3.2 Adaptive Personalization Configuration and Operation

This section describes how you configure personalization in CoreMedia Adaptive Personalization.

### 3.2.1 Defining Property Editors

This chapter describes how you configure *CoreMedia Adaptive Personalization* features in the underlying platforms.

- [Section 3.2.1, “Defining Property Editors” \[22\]](#) describes how you can integrate the delivered property editors into *CoreMedia Studio* content forms.
- [Section 3.2.2, “Configuring Caching For Rules and Condition Evaluation” \[25\]](#) describes how to cache rules and conditions.

*CoreMedia Adaptive Personalization* includes two property editors for editing personalization specific content properties in *CoreMedia Studio*:

- `SelectionRulesField` is an editor to be used to define content selection rules
- `ConditionsField` is an editor to be used to define customer segment conditions

`SelectionRulesField` and `ConditionsField` can be used for a content property of type XML using schema `coremedia-selectionrules-1.0`. This schema is defined in `cap-personalization-schema-bundle.jar` and can be imported into a content type declaration file by adding the following code near the top of the file:

```
<XmlSchema Name="coremedia-selectionrules-1.0"
  SchemaLocation="classpath:xml/coremedia-selectionrules-1.0.xsd"
  Language="http://www.w3.org/2001/XMLSchema"/>
```

You configure a property editor for a specific content property as explained in the *CoreMedia Studio Manual*.

The *CoreMedia Blueprint* development workspace provides a Studio form using these condition fields to edit personalized content items.

## Setting up the Property Editors

*CoreMedia Adaptive Personalization* offers different types of conditions that are listed in [Section 5.1, "Condition Types" \[92\]](#). Therefore, you can adapt the property editors for selection rules and segment conditions to the types of properties your application is using. For example, if your context contains a property `dateOfBirth` that holds the current visitor's date of birth, the property editors should use a `DateCondition` instead of a `StringCondition` for conditions using the property.

You configure the editors in the `ext-xml` files defining the property editors for your content types.

### SelectionRulesField

`SelectionRulesField` supports the attributes `propertyName` and `allowedContentType`.

- `propertyName` is required and denotes the name of the content property to be associated with the field. This attribute is common to all property editors in *CoreMedia Studio*.
- `allowedContentType` is optional and denotes the name of the type of content that can be selected via rules defined using this property editor.

For example, if `allowedContentType="CMTeasable"` is used, only content items of type `CMTeasable` or of any subtype can be added to the rules created via this editor. Thus, you won't be able to create a rule that selects a `CMChannel`.

The child element `conditionItems` defines the condition types the `SelectionRulesField` will support. The following table lists the allowed attributes in conditions.

Property Name	Description
<code>conditionName</code>	The text the user sees in the combo box used to select the type of a condition. It is not further processed by the rule editor and thus can be an arbitrary string. <i>Required</i>
<code>propertyPrefix</code>	The prefix denotes the context name of the property and does not include the separating '.'. For example, to denote all properties in the 'foo' context, such as 'foo.bar' and 'foo.zork', supply 'foo' as the <code>propertyPrefix</code> value. <code>ConditionTypes</code> support either <code>propertyPrefix</code> or <code>propertyName</code> , but not both.
<code>propertyName</code>	The name of the property the condition is associated with. The rule editor compares the name of the property used in a condition with this string to identify the UI element it should use for rendering the condition. <code>ConditionTypes</code> support either <code>propertyPrefix</code> or <code>propertyName</code> , but not both.

Property Name	Description
<code>isDefault</code>	If set to "true", the condition type is used as the selected condition type if a new condition is added to a rule via the UI. Make sure that there's only a single default item because otherwise you cannot be sure which one will be selected. Default is 'false'.

Table 3.1. All properties

Example with `propertyName` attribute:

```
<perso:dateCondition conditionName="Date of Birth"
  propertyName="personal.dateofbirth"/>
```

This element makes the `SelectionRulesField` use a `DateCondition` if a condition is defined on the `personal.dateofbirth` property.

Example with `propertyPrefix` attribute:

```
<perso:keywordCondition conditionName='Explicit Interest'
  propertyPrefix='explicit' isDefault='true'/>
```

This element makes the `SelectionRulesField` use a `KeywordCondition` for all properties starting with the prefix "explicit" followed by ".", for example, "explicit.science".

The order of elements in `conditionItems` is relevant for item selection. The `SelectionRulesField` searches the list top to bottom to find the `Condition` for a given property name. It uses the first item whose `propertyName` or `propertyPrefix` matches.

## ConditionsField

The `ConditionsField` property editor is similar to the `SelectionRulesEditor` in that it allows you to define a list of customer segment conditions using the same components and configuration, except for the `SegmentCondition`.

## Using the `AddConditionItemsPlugin` to add conditions to the property editors

The `SelectionRuleField` as well as the `ConditionsField` support the `AddConditionItemsPlugin` to allow the configuration of condition items via plugin rules. Plugin rules are a mechanism provided by *CoreMedia Studio* to allow *Studio* plugins to modify common UI components.

For example, you might want to keep the configuration of condition items specific to your CRM system in the same project as your CAE/CRM integration. To this end, create a *CoreMedia Studio* plugin containing plugin rules that configure the condition items

using the `AddConditionItemsPlugin` and introduce it as a Maven dependency to your *CoreMedia Studio* web application (for details, see the *CoreMedia Studio Developer Manual*).

Module `p13n-studio` of the *CoreMedia Blueprint* development workspace shows how to configure selection rules based on Elastic Social contexts.

## 3.2.2 Configuring Caching For Rules and Condition Evaluation

Selection rules as well as segment conditions are stored in textual form in content properties. To be evaluated in the *CAE*, they have to be parsed and transformed into an executable form. This transformation is expensive and thus should only be performed if necessary, that is, if the corresponding content properties were modified. Therefore, you should use CoreMedia data views and the CoreMedia cache for caching.

`SelectionRulesProcessor` as well as `ConditionsProcessor` can be cached. In your content beans, use a property getter that returns the appropriate processor for your content item and create a data view with association type 'static' for this getter. In the methods that use the processor, access it via the getter. This guarantees that parsing is only done if necessary.

If you use the `SegmentSource`, you do not need to care about caching segment conditions, as this is done by the source itself. You'll find an example data view declaration for the type `CMSelectionRules` in the *CoreMedia Content Cloud p13n* extension. For further information on how data views work, refer to the *Content Applications Developer Manual*.

## 3.2.3 Configuring The Customer Persona Form

You can change the used context properties and/or the appearance of the context property editors of the *Customer Persona Form* by reconfiguring the `CMUserProfile` content type.

If you add context properties to the content you do not need to adapt the content type definition for the *Content Server* because all context properties are stored in one, already defined plain text blob property.

Underneath a `PersonaGroupContainer` there are special property fields which are responsible for handling the forwarded property. You can write your own property fields for custom properties.

There are already the most common property fields available:

- `PersonaNumberPropertyField` - accepts just digits, '-' and '.'
- `PersonaStringPropertyField` - accepts all kind of characters
- `PersonaTimePropertyField` - accepts time in the specified time format; you can choose time from the combo box as well
- `PersonaDatePropertyField` - accepts a date in the specified date format; you can pick the date from the date picker as well
- `PersonaDateTimeProperty` - combined time and date property fields. You need to fill both values.

To write your own property fields have a look at [Section 3.3.2.4, "Working With Test Contexts" \[39\]](#).

### 3.2.3.1 Configure the displayed User Segments

By default, all user segments available in the eCommerce system are displayed for selection. Under some circumstances it may be desirable to restrict the shown user segments, for instance for studio performance reasons or for better clarity for the editor. For this reason there is the possibility to provide a predefined list with user segments to display. This list can be configured in the site-specific *LiveContext* settings content item. To define the list, open the *LiveContext* settings content item and create a new *String List* named `configuredSegmentIds` below the *commerce* node. Fill this list with the IDs of the desired user segments. The IDs have the following structure `[vendor]://catalog/segment/[externalId]`

## 3.2.4 Configuring The PersonaSelector

The `PersonaSelector` is a component of *CoreMedia Adaptive Personalization* that is shown in the Preview Toolbar of *CoreMedia Studio*. As depicted in [Figure 3.3, "The PersonaSelector in CoreMedia Studio" \[27\]](#), you can unfold it by pressing the corresponding button in the Preview's Toolbar (1.). It contains *Customer Personas* that represent typical visitors of your website. When selecting a Customer Persona its artificial context properties are read from the CMS and the Preview is rendered accordingly. For example, a *Customer Persona* could explicitly simulate a specific date to test a Personalized Content displaying special offers on Christmas Eve.

In addition to simply selecting a *Customer Persona*, the `PersonaSelector` allows you the following:

- navigate to the location of the *Customer Personas*' backing content item in the Content Management Server (2.) and



- open the *Customer Persona Info Window* with detailed information about the context properties of a specific *Customer Persona* [3.].

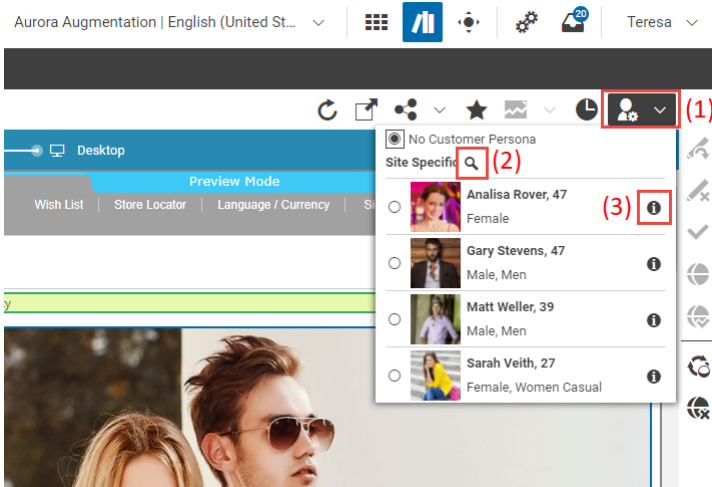


Figure 3.3. The PersonaSelector in CoreMedia Studio

The initial view of the *Customer Persona Info Window* displays the basic context properties as shown in Figure 3.4, “The Customer Persona Info Window in CoreMedia Studio” [28]. You can display a grouped list of all contained properties by switching to the “Details” tab [1.]. To permanently modify a context property press the “Edit” button [2.], which opens the Customer Persona’s backing CMS content item in a new content tab. You can also activate a *Customer Persona* from the *Customer Persona Info Window* by clicking the “Activate Customer Persona” button [3.]. If you want to know how to customize localized context properties of the *Customer Persona Info Window*, have a look at Section 3.2.5, “Localizing the Customer Persona Info Window” [29].

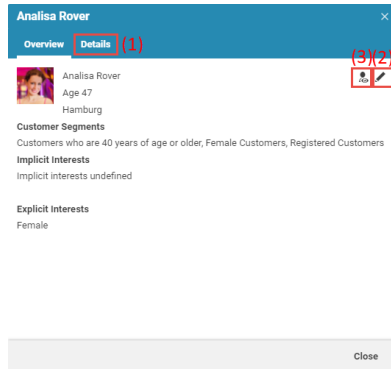


Figure 3.4. The Customer Persona Info Window in CoreMedia Studio

By default, the `PersonaSelector` offers a list of all *Customer Personas* - which are contents of type `CMUserProfile` - that are located in the `/System/personalization/profiles` folder (which is different in *CoreMedia Blueprint*, see further below). Furthermore, it offers a method that can be used to adapt the paths from which *Customer Personas* are retrieved:

- `public function addPath(repositoryPath:String, groupHeaderLabel:String)`
- `public function clearPaths()`

The `groupHeaderLabel` argument of the `addPath` method defines a label that is used to group the *Customer Personas* within the `PersonaSelector` that are retrieved from the same path.

### Example

If you do not want to retrieve *Customer Personas* from the default path, but from the paths `/context` and `/experimental` where all *Customer Personas* from the latter location should be suffixed with "experimental" you would do the following in a plugin:

```
...
public function init(component:Component):void {
    const selector:PersonaSelector = component as PersonaSelector;
    if (!selector) {
        throw Error("plugin is only applicable to components of
            type PersonaSelector");
    }
    selector.clearPaths();
    selector.addPath('/contexts');
    selector.addPath('/experimental', 'experimental');
```

```
}
...
```

*CoreMedia Adaptive Personalization* contains ready-made plugins for use with the `PersonaSelector`:

ptype	Description
<code>disablefortypes</code>	Disables the selector if one among a set of preconfigured content types is being previewed.
<code>addpath</code>	Adds a path to the list of path used by the selector.
<code>addsitespecificpath</code>	Adds a site specific path containing a placeholder to the selector.

Table 3.2. Plugins for `PersonaSelector`

You add plugins to a component via the plugin rules of your project module (see the "Understanding Studio Plugins" section in the *CoreMedia Studio Developer Manual* for details). *CoreMedia Blueprint* provides a ready to use example of the `PersonaSelector` with the side independent default path `/Settings/Options/Personalization/Profiles` and the site specific default path `Options/Personalization/Profiles`.

## 3.2.5 Localizing the Customer Persona Info Window

The data shown in the *Customer Persona Info Window* can be localized, so that the right language version is shown in *CoreMedia Studio*. You can localize the following items:

- context names
- property keys
- property values

The *Customer Persona Info Window* searches for the localized form of an element by looking for global resource bundle properties of the form (where `name` is the name of a context, `key` is a property key and `value` is a property value):

- `p13n_context_<name>` for the name of a context
- `p13n_context_<name>_<key>` for the name of a property key within a context

- `p13n_context_<name>_<key>_<value>` for a property value within a context

Any non-word characters (everything except alphanumeric characters and '\_') are removed before the look-up key is constructed, that is, the localization property for the context "a sample context" would be `p13n_context_asamplecontext`.

Property values representing time stamps are not looked up in a localization file, but automatically transformed into a date representations matching the selected locale.

If the *Customer Persona Info Window* cannot find a matching localization property, the original value is used. Refer to the CoreMedia Studio Developer manual on how to set up resource bundles in CoreMedia Studio.

## 3.2.6 Monitoring Components With JMX

Key components of *CoreMedia Adaptive Personalization* expose management functionality via the following JMX MBeans:

- `ContextCollectorManager`
- `SelectionRuleProcessorManager`

You can find a detailed list of all available JMX properties in the corresponding API documentation of the classes.

### ContextCollectorManager

This class provides statistics about the performance of the `ContextCollector` and each registered `ContextSource`. By default, only performance tracking of the `ContextCollector` is enabled. If you want to enable tracking of the sources, use the `perSourcePerformanceEnabled` flag in your JMX console.

You can use the `ContextCollectorManager` bean to activate and deactivate the `ContextCollector`. This might be useful if you have an unexpected spike in high traffic and you want to disable *Adaptive Personalization*. Use the `ContextCollectorEnable` flag for this task.

### SelectionRuleProcessorManager

This class provides statistics about the performance of all `SelectionRuleProcessor` instances used in a *CAE*.

## 3.3 Developing With Adaptive Personalization

*CoreMedia Adaptive Personalization* is a set of building blocks by nature. As such, there is a lot of room for customizations and custom implementation. Each of the following sections explains how to use and combine the available building blocks and features.

### 3.3.1 Architectural Overview

*CoreMedia Adaptive Personalization* is a collection of building blocks intended to assist you in leveraging the versatility of the CAE to implement dynamic and personalized content delivery. The basic idea is that each request to the site by a visitor is associated with context data and that this data is used to determine what is to be delivered to the visitor. Contexts might represent arbitrary things about the user and his environment, such as the user's current interests, the location from which the user accesses the site, and the device used.

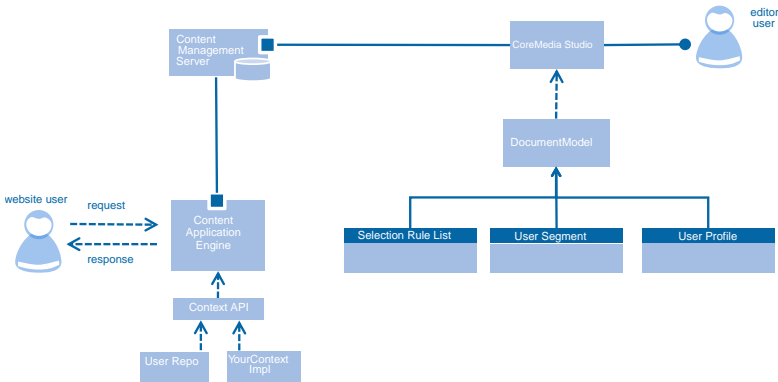


Figure 3.5. Adaptive Personalization overview

*CoreMedia Adaptive Personalization* runs partly within the CAE delivery component to evaluate the selection and choice of content based on your settings. *CoreMedia Adaptive Personalization* also depends on content types in the CoreMedia content repository to persist certain settings and personalization rules, representing the personalized content you want to place on your site. These content types can be edited conveniently through CoreMedia's web based editor by using the *Adaptive Personalization Editor Plugin*. Using the *CoreMedia Adaptive Personalization* content types in your publication workflow, you

can place personalized content just like you would place any other content, using the same editing metaphors and workflows as with any other CoreMedia content.

Both components are integrated into *CoreMedia Blueprint* by default. *CoreMedia Blueprint* already has suitable content types in place. When using a custom content type model, it will be necessary to model suitable content types for *Adaptive Personalization* and configure their usage according to documentation.

Dedicated personalization content items in the content repository are used to manage personalization of a site editorially. The type *Personalized Content* represents personalized content by storing a Markup property with a set of selection rules used to decide what content to render when a request is processed in the CAE. The type *Customer Segment* allows you to define segments of website users based on conditional rules. Using the same selection rule logic as the type *Personalized Content*, this type stores the rules as a String property. *Customer Segments* can then in term be used within a matching condition type in *Personalized Content* content items. The type *Test User Context* can be used by editors within *CoreMedia Studio* to switch user contexts within the preview pane to test and preview the effects of personalization settings before publishing any content items to a live website. These content items are edited, placed and published from within *CoreMedia Studio* like any other content item - except the test user contexts which have no effect or use when published. During delivery of those content items, *CoreMedia Adaptive Personalization* components running within the CAE will interpret and evaluate the contents of those content items in order to render matching, personalized content based on the user's request and the user context.

The CAE has access to a pool of context sources addressed through the Context API, which is also described in detail in this manual. Out of the box, *CoreMedia Adaptive Personalization* supports storing user context information in cookies. For each request, the CAE can determine the specific context using the contexts available through the Context API implement context sources. The information stored in those contexts can be used to define selection rules in *Personalized Content* and *User Segment* content items.

The evaluation of dynamic, request specific selection rules per request is costly in terms of computation. Because of this, *CoreMedia Adaptive Personalization* facilitates the caching features already in place in the CAE and computes a cacheable, precomputed representation of a set of selection rules, using both CAE data views and cache keys where appropriate. This minimizes the impact of personalization on CAE performance.

## Adaptive Personalization in the CAE

Within the CAE a high level point of view request processing looks like in figure.

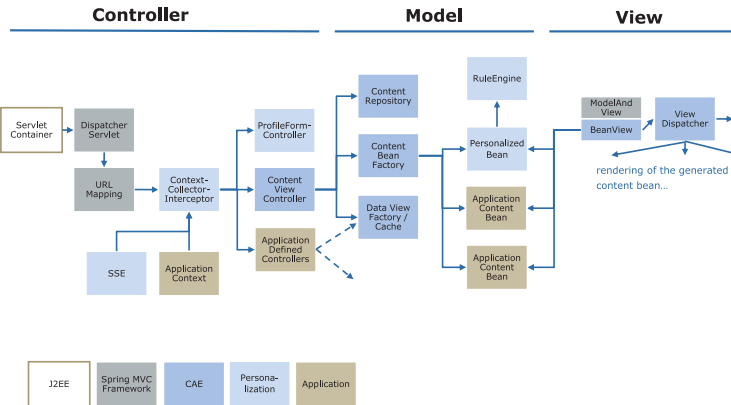


Figure 3.6. Request processing in the CAE

*CoreMedia Adaptive Personalization* integrates into the CAE using the standard Spring facilities and API. Within the *CoreMedia Blueprint* development workspace, *Adaptive Personalization* is already integrated in the CAE setup. Refer to the installation documentation for details about how to manipulate the Spring configuration of *CoreMedia Adaptive Personalization*.

Within the CAE, *Adaptive Personalization* performs two basic functions:

- collecting information from all available contexts for the current request
- evaluating content selection rules as they are used within Personalized Content and Customer Segments

Context information must be collected before processing a request and can be persisted after having processed the request. This can be achieved through Spring Web MVC interceptors or servlet filters. Evaluation of content selection rules may be performed while processing a request, for example, using content bean logic.

## How contexts, properties, conditions and personas work together

In *CoreMedia Adaptive Personalization* the information about a website users context is stored in a so called `ContextCollection` that can be best thought of as a request scope map holding the request's context objects. All context sources that are

configured via the Spring application context are called to retrieve and store their context information for the given Request into the request - and therefore usually user-specific - *ContextCollection*. A common scenario is to instantiate a *ContextCollection* when a request hits the *CoreMedia Content Application Engine* (CAE) with enabled *CoreMedia Adaptive Personalization*. Alternatively, a *ContextCollection* can be implemented using thread local storage, so that it is effectively a singleton bean (as the *DefaultContextCollection*).

A context is identified by a name ("keywords", "personal" or "system", for example) and can store arbitrary data. Usually (at least the default contexts that are shipped with the product) the context sources implement the *PropertyProvider* interface which requires that a context stores Map-like information in key/value pairs. Therefore, the properties of a given context are identified by the context name and property names with corresponding values, for example a numeric value, a string value, a date value.

### Example

```
<contextname>.<propertyname>=<value>
```

The `<contextname>.<propertyname>` pattern is also used in personalization selection rules to identify the context information that will be used in a rule.

### Examples

```
select <content> if <contextname>.<propertyname> \
  <operator> <value>
select content:1234 if keyword.sports > 0.5
```

In the *Selection Rules* editor, which is part of the *CoreMedia Studio* plug-in, you can use different UI components to define different conditions in personalization rules. Which UI component is used, can be configured by a manually mapping from context property names to component types. This is, for example, done in *CMSelectionRulesForm.mxml* and *CMSegmentForm.mxml* of the *CoreMedia Blueprint* development workspace.

When the *CAE* evaluates a personalization rule for a given request, the *Selection RulesProcessor* uses the already known `<contextname>.<property name>` pattern to check whether the values in the current *ContextCollection* match the rules or not. For more details on the selection rule execution please refer to [Section 3.3.3, "Working With Selection Rule Lists" \[43\]](#).

Due to the map-style nature of the context data, it is very easy to create test data for editorial usage. That is exactly how the persona contexts work in the personalization UI (the *PersonaSelector*).

Instead of actually instantiating a *ContextSource* with an identifier "keyword" and the property "sports" and value 70% you can simply write "keyword.sports=0.7" into the persona context. This information is then used in the *CAE* as context information and the real "keyword" *ContextSource* is ignored.



When the *CAE* evaluates a personalization rule, an executable representation of the rule string is created or retrieved from the cache and supplied with the active user's `ContextCollection`. This representation uses the `<contextname>.<propertyname>` pattern encoded in the individual conditions to retrieve the corresponding property values from the `ContextCollection` and applies the specified comparison operator from the personalization rule.

## 3.3.2 Working With the User's Context

Personalizing the user's experience relies on data about the user. Within the system, this data is represented as so called context objects (simple POJOs) stored in a `ContextCollection`. The `ContextCollection` is made available to all components requiring access to context objects.

In a personalized web application, the `ContextCollection` is filled with all objects relevant for processing the request prior to actually processing the request. Relevant context data may be located in disparate sources (for example, internal CRM systems and external social community sites), thus a simple way to collect and combine this data is required. This is the responsibility of the `ContextCollector`. The `ContextCollector` can be invoked by either a Spring Web MVC handler interceptor that is installed in all handler chains requiring context data, or a servlet filter. For this purpose, the implementations `PersonalizationHandlerInterceptor` and `PersonalizationServletFilter` are provided. In the following, it is assumed that the `ContextCollector` is set up as a handler interceptor, if not stated otherwise.

### The request flow

The sequence diagram below shows an example of how context objects are retrieved and provided for further manipulation and decision making. In general, for every request all context objects for the active user are loaded. These objects can be used, for example, to select content to be rendered or keep track of the pages the user visits. After request processing is finished, changed context objects are written back to their source. The `ContextCollection` is then cleared.

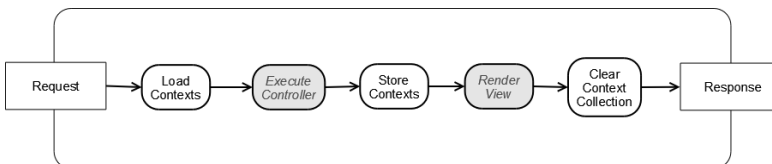


Figure 3.7. *ContextObject* usage

### Loading Contexts

For each request, the `ContextCollector` asks each of its `ContextSources` to load its context objects and place them into the `ContextCollection` of the active user.

Each `ContextSource` retrieves part of the user's context objects. For example, the `CookieSource` checks if a specific cookie is available in the current request. If it is, the value of the cookie is decoded into a context object and put into the `ContextCollection` collection. If not, a new and empty context is created.

### Using Contexts

Contexts objects can be read and modified throughout request processing. For example, the contexts can be used to determine which content to show to the user or to capture user behavior (see the [Section 3.3.5, "Working With Scoring" \[49\]](#)).

### Storing Contexts

After request processing, each `ContextSource` gets the chance to persist the contexts objects it is responsible for.

### Supplied ContextSources

*CoreMedia Adaptive Personalization* comes with a set of `ContextSources` ready to be used in your project. See [Section 5.3, "Supplied Context Sources" \[95\]](#) for a table of all delivered sources.

A `ContextSource` typically requires a context name and a `ContextFactory` or `ContextCoDec` instance to be appropriately configured. The name is used as the key under which the context object is stored in the `ContextCollection`. Make sure these names are unique to prevent replacing context objects added by other sources. The `ContextFactory` or `ContextCoDec` is used by the source to create new context instances and serialize as well as deserialize a context.

## 3.3.2.1 Configuring the Context Collector

The `ContextCollector` is responsible for collecting context data from `ContextSources`. It can be invoked through a Spring MVC interceptor or a servlet filter both of which must be installed in all handler chains that require user context data.

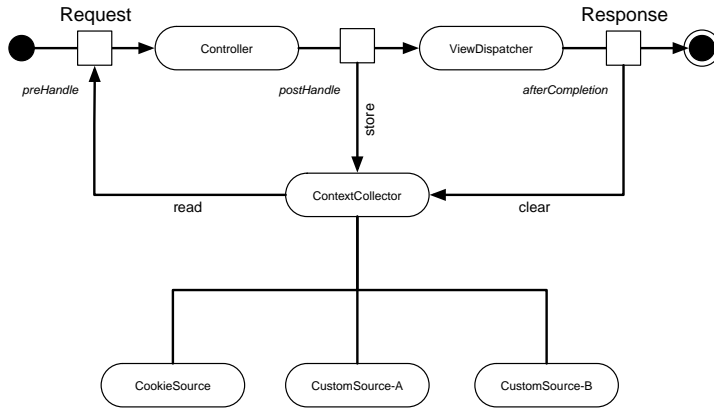


Figure 3.8. ContextCollector position

The `ContextCollector` manages a list of `ContextSources` to fill before processing the request. Sources are processed in the order implied by the respective list and the request and session lifecycle are mapped as follows to the `ContextSource` methods: `preHandle` and `postHandle` can be invoked by a servlet filter or by the corresponding lifecycle methods of a Spring `HandlerInterceptor`, `preSession` and `postSession` relate to `sessionCreated` and `sessionDestroyed` of an `HttpSessionListener`.

In addition to the lists of context sources, you have got to provide a `LicenseHelper` bean, configured with a connection to the content server, as well as the `ContextCollection` bean to be filled by the collector.

### 3.3.2.2 Implementing ContextSources

Implementing your own `ContextSource` is straightforward. It is quite similar to the implementation of a Spring `HandlerInterceptor` in that the interface declares several methods called in a request's lifecycle. What you do within those methods is entirely up to you, but keep in mind that they are executed for each request, so

- make them fast and
- make them robust.

You are free to throw any kind of exception within a `ContextSource` implementation - the `ContextCollector` represents an exception firewall that will log the exception and continue with the next source.

You will notice that almost all methods in the `ContextSource` interface expect a `ContextCollection` argument. This argument represents the collection used for the current request in the state at the time of the call. Hence, if source A's `preHandle` method is executed before source B's, A will not see any objects added later by B. Keep this in mind if you think about the order of your sources.

There are a couple of conventions you should follow to create a proper `ContextSource`:

- If you want your `ContextSource` to be independent of the type of context object it manages (if your source is only concerned with storing and not modifying contexts in any way, for example), support the `ContextFactory` or `ContextCoDec` interfaces. Most context objects implement these interfaces and thus can readily be used by any source that supports them.
- If your source serializes and persists context objects, check for the `DirtyFlagMaintainer` interface on a context object before storing it. If the interface is implemented and the dirty flag is not set, you do not need to store the context because it has not changed since it was last read. Make sure that you reset the dirty flag if you save the context.

Finally, if you do not need to execute logic in all request phases, you might want to derive your source from `AbstractContextSource`, which provides empty implementations of all `ContextSource` methods.

### 3.3.2.3 Implementing Context

Context objects are arbitrary POJOs, so you can define and implement them in the way most suitable for your application.

If you want to reuse some of the functionality provided by *CoreMedia Adaptive Personalization*, a specific `ContextSource` for example, you need to implement the required interfaces. In particular, most `ContextSource` implementations require a `ContextFactory` or a `ContextCoDec` implementation for your context, which provide the knowledge of how to create, serialize, and deserialize an instance of your context. Most of them also use the `DirtyFlagMaintainer` interface, writing a context object back into their respective stores only if the context's dirty flag is set.

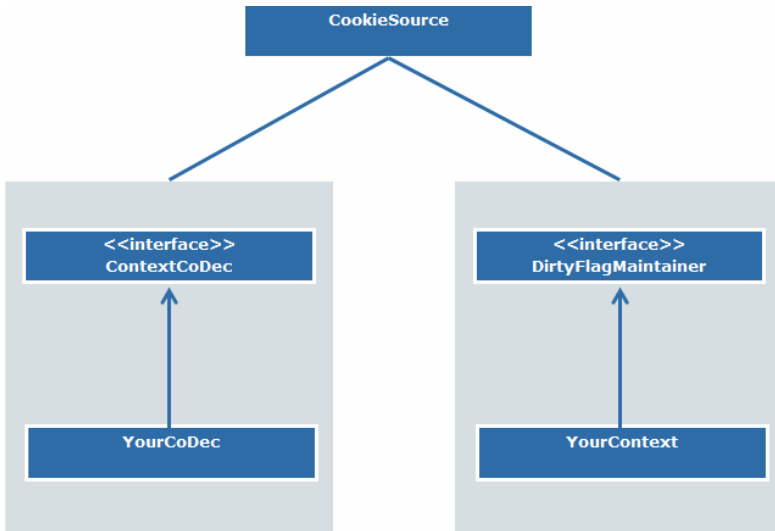


Figure 3.9. A ContextSource implementing typical interfaces

If your context objects contains properties that should be available in selection rules, simply implement the `PropertyProvider` interface.

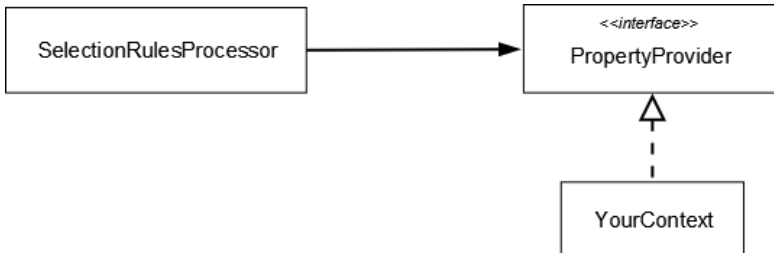


Figure 3.10. PropertyProvider Interface

### 3.3.2.4 Working With Test Contexts

Test contexts allow you to test your personalized web pages by viewing them with different user-context data in a preview CAE. You create a test context as a content of type `CMUserProfile` in *CoreMedia Studio*. Within the CAE, test contexts are created by an instance of `TestContextSource`.

By convention, test contexts are located in the `/System/personalization/profiles` folder of the CoreMedia repository. A content item with name 'DEFAULT' in this folder will be used as the preselected test context for each newly created tab in *CoreMedia Studio*.

The default settings of a `TestContextSource` assume that they are of content type `CMUserProfile` and contain a blob property with MIME type `text/plain` containing the context-property definitions using the syntax of a Java property file. These properties are parsed into one or more context objects that implement the `PropertyProvider` interface.

### Setting Up a TestContextSource Instance

The `TestContextSource` requires an instance of `CapConnection` to be able to retrieve the test contexts from *CoreMedia CMS*. In addition, the name of the expected content type can be set. By default, it is assumed that test contexts are defined in content items of type `CMUserProfile`.

Typically, you may want to set up a separate `ContextCollector` instance based on test contexts. To this end, add the `TestContextSource` instance to that `ContextCollector` bean and switch the collector instances before processing a request. The `PreviewPersonalizationHandlerInterceptor` switches context collectors dependent on a request parameter indicating that test context sources are to be used. See [Section 3.3.2, "Working With the User's Context" \[35\]](#) for details on how the `ContextCollector` works.

### Adapting a TestContextSource to Project-Specific Requirements

A `TestContextSource` retrieves a test-context content item from the CMS and applies `TestContextExtractors` to the content. The responsibility of a `TestContextExtractor` is to create test contexts from the values of content properties and add them to the supplied `ContextCollection` instance. By default, `TestContextSource` applies the `PropertiesTestContextExtractor`, which creates test contexts given a plaintext blob containing Java-style property declarations.

```
public interface TestContextExtractor {
    void extractTestContextsFromContent(final Content content,
                                       final ContextCollection contextCollection);
}
```

You can set the extractors to be applied using the `ContextExtractors` property of the source. This allows you to use new properties or properties with differently structured values to define your test contexts without reimplementing the functionality of `TestContextSource`. For example, to use another property in your test-context content item, follow the following steps:

1. Add the property to the content type definition of `CMUserProfile`.
2. Implement a new `TestContextExtractor` that knows how to create test contexts from the value of your new property.
3. Set the list of extractors to be used by the `TestContextSource` in your CAE to contain the default `PropertiesTestContextExtractor` as well as your own extractor.

You can also change the name of the test-context content type by setting the `TestContextDocType` property of `TestContextSource`.

## Customizing the Customer Persona Form

In order to customize the rendering of a `CMUserProfile` via the Customer Persona Form component, you need to understand the underlying basic architecture: The UI component consists of property containers (`PersonaGroupContainer`, for example) that hold one or more property fields (`PersonaStringProperty`, for example). You can configure each of the existing implementations or add your own. To change the appearance of property fields and containers have a look at [Section 3.2.3, "Configuring The Customer Persona Form" \[25\]](#).

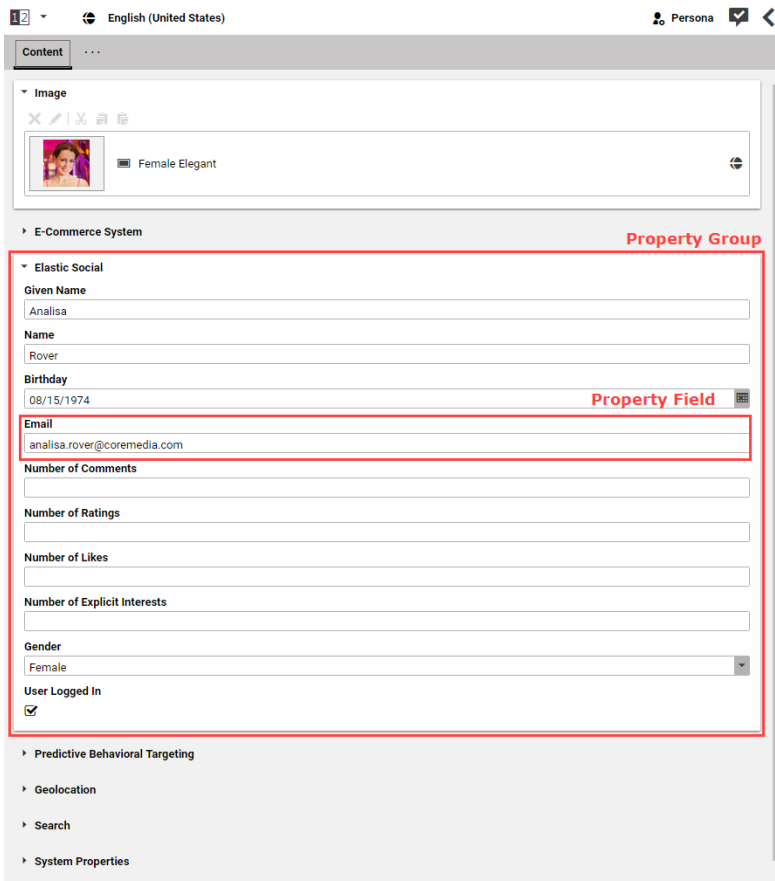


Figure 3.11. Property container and field

## Adding your own property field

You can define your own property field in addition to the already existing ones, such as the `PersonaNumberPropertyField`. Your new field needs to contain three major parts:

- It needs to get the context data
- It needs to access the `propertyContext` and `propertyName`
- It needs to bind the entered data to the context property



## Get the context data

The user context data is actually a text blob which is interpreted as a properties object. The blob information is stored in a `ValueExpression` accessed via the `bindTo` property of the content item's backing `config` object (see the *Studio Developer Manual* for details). This `ValueExpression` is "forwarded" to the child components of the `CMUserProfile` content. Each child component can access and listen to changes of its given (sub)property. Furthermore, each child component needs to implement the forwarding mechanism as well. You do this by adding a default attribute to your component which is responsible for telling every item to get the corresponding `ValueExpression`.

## Access `propertyContext` and `propertyName`

If you write your own property field, you need to specify the name and the context of the property you want to add. Therefore, you need to configure two attributes to accept the forwarded `propertyContext` and `propertyName`. This could be done by adding the following snippet underneath your imports:

```
<fx:Declarations>
<!--
  The context of the Bean-property to bind in this field.
-->
<fx:String id="propertyContext"/>

<!--
  The property of the Bean to bind in this field.
-->
<fx:String id="propertyName"/>
</fx:Declarations>
```

## Bind your field to the property

By configuring these attributes, you are able to access your property by setting these values to your `propertyBinding` inside your property field. Examples are given in the `p13n-studio` module of the CoreMedia Blueprint development workspace.

# 3.3.3 Working With Selection Rule Lists

Content Selection Rules allow an editor to define a set of rules that determine which content items to show based on the active user's context. For example, the entry page of a site could take the user's local time into account when selecting a welcome message. To this end, rules that determine what to show under certain conditions are stored in a content property which is evaluated in the *CAE* at time of delivery.

A selection rule is of the general form:

```
select <some content> if <some conditions>
```

Here `<some content>` specifies the content to be selected if `<some conditions>` evaluate to true. The content is specified by its unique id using the syntax

`content:<id>`, while conditions are specified using `<context property name> <operator> <value>`.

### <context property name>

The `<context property name>` can have two different forms:

- It can consist of the name of the context object, followed by a dot ['.'] and followed by the name of the context property you want to test in the condition.

Example:

```
select content:23 if count.foo > 12
```

- It can consist of the name of the context object, followed by some more information in brackets ['[]']. Using this notation, the information can simply consist of the context property name, or of a content ID using the syntax `content:<id>`, or an arbitrary string in double quotes. The property name is handled as in the form above.

Example:

```
select content:23 if count[foo] > 12
select content:23 if count[content:12] > 12
select content:23 if count["some complex key"] > 12
```

### <operator>

`<operator>` is one of the supported comparison operators. These are:

Operator	Description
=	Equals
<	Less than
<=	Less than or equal
>	Greater than
>=	Greater than or equal
!=	Not equal

Operator	Description
#	Contains as substring. Only used for string literals

Table 3.3. Supported operators

**<value>**

**<value>** is the literal value to compare the property value to. Supported types are:

Type	Description
Boolean	true or false
Float	Examples: 2.34, 0.543e-12
Integer	Examples: 42, 1093
Date	A date in ISO8601 format (yyyy-mm-ddThh:mm:ss) 2010-12-15T17:08:52, for instance
Time	Time of day in the format hh:mm:ss, 23:01:00, for example
String	A string literal enclosed in double quotes. Java escape sequences are supported. Examples: "foo", "frob\\b\bnitz"
ContentId	A representation of a content ID, following the syntax <code>content : &lt;id&gt;</code> . For example, <code>content : 4712</code> . Only equal and not equal operators are supported.

Table 3.4. Supported values

The Evaluation of a condition is performed as follows:

1. Determine the type of the value used in the condition.
2. Retrieve the value of the context property.
3. If the type of the context property value can be compared to the type of the condition value, perform the comparison.
4. Otherwise, evaluate to false.

If the context does not contain the property specified in the condition, the behavior depends on the type of the comparison value:

Type	Behavior
Boolean	Assume property is <code>false</code>
Float	Assume property is 0
Integer	Assume property is 0
Date	Evaluate to <code>false</code>
Time	Evaluate to <code>false</code>
String	Evaluate to <code>false</code>
ContentId	Evaluate to <code>false</code>

Table 3.5. Behavior when the context does not contain the specified property

Conditions can be combined using "and" and "or" in their familiar semantics. Furthermore, negation (not) and parentheses are supported. Thus, the following is a valid condition:

```
behavior.good = true and not
  (datetime.date > 2010-12-25T00:00:00 or vcard.name = "Santa")
```

Rules are separated via a newline character or a semicolon, for example

```
select content:23 if count.foo > 12; select content:42 if count.foo < 5
```

## The SelectionRuleProcessor

Rules are evaluated by an instance of `SelectionRuleProcessor`. Its constructor expects a string containing the rules which are transformed into a representation that can be evaluated very efficiently. The `process*` method apply the rules to the supplied `ContextCollection` and return a list of all content items selected in order of their corresponding rules.

The `SelectionRuleProcessor` can only access context objects of type `PropertyProvider`, so make sure that all properties you are using in your rules are accessible via such an object. All context classes supplied with *CoreMedia Adaptive Personalization* implement the `PropertyProvider` interface.

`SelectionRuleProcessor` instances can and should be cached, because the process of transforming a string of rules into an internal representation is expensive and not user or context dependent. The recommended pattern is to add a property getter to your content beans that returns a `SelectionRuleProcessor` instance representing the rules stored in the associated content item, then define a data view on the getter with association type `static`. See the *Content Applications Developer Manual* for a detailed description of data views.

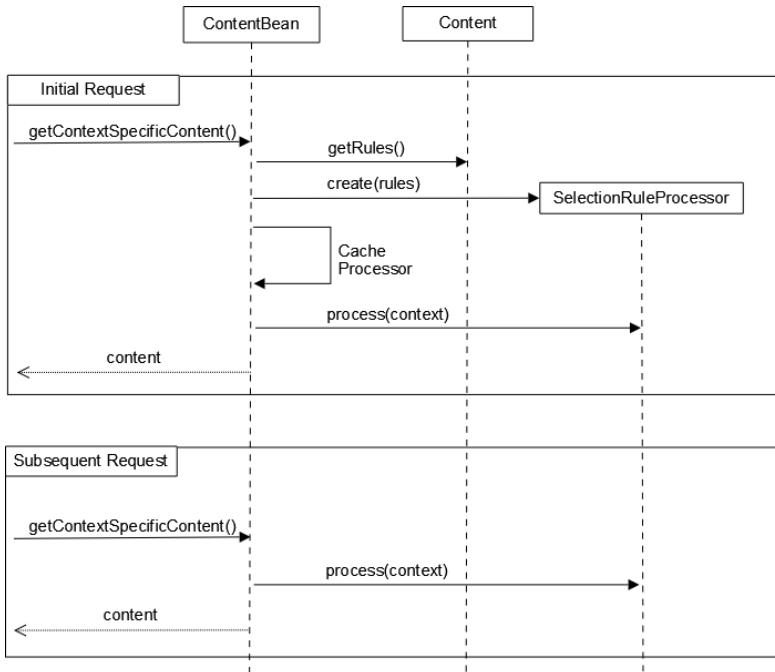


Figure 3.12. Caching `SelectionRuleProcessor` instances

## Saving Rules as an XML Property

Selection Rules created via *CoreMedia Studio* are saved in XML format using the grammar `coremedia-selectionrules-1.0`. In this representation, references to content objects (including customer segment definitions) are encoded as `xlink` attributes allowing the *CoreMedia Content Server* to check whether the referenced content is available on the live servers before publishing the rules.

To convert rules in XML format into the plain text format expected by the `SelectionRuleProcessor`, use the helper class `XMLCoDec`.

## 3.3.4 Working With Customer Segments

Customer segments represent groups of website visitors. Users belong to a segment if they satisfy the conditions associated with the respective segment, for example if a user is a premium user and at most 35 years old.

Segment conditions are stored in a property of a content type that represents segments in your application. In *CoreMedia Blueprint*, this content type is called `CMSegment`. These conditions are used by the `SegmentSource` to determine membership in a segment.

*CoreMedia Adaptive Personalization* offers a *CoreMedia Studio* field editor for segment conditions called `ConditionsField`.

### Configuring the SegmentSource

`SegmentSource` is a `ContextSource` implementation that evaluates segment conditions to determine the current user's membership in a segment. The source evaluates the conditions in its `preHandle` method for each request. The conditions are applied to the contents of the `ContextCollection` at the time of invocation of `preHandle`, thus the `SegmentSource` must be placed behind all other sources that provide context information used in the segment conditions.

Membership in a segment is indicated by a property of the segment's simplified content ID (`content:<id>`) of the content item representing the segment. So a segment represented by content 42 will be mapped to the property `'content:42'`. This property is set to the Boolean value `'true'` if the user is a member of the segment; segments a user does not belong to are either not represented in the context or are assigned a value of `'false'`.

The `SegmentSource` requires a reference to the `Cache` used for storing preprocessed segment conditions and to the `ContentRepository` to retrieve segment content items. Further, as with all sources, you've got to provide the name of the context to be used to store the segment properties.

Optionally, you may configure in which folder of the repository the source looks for segment content items, the content type used to represent segments, and the name of the property of the content type that contains the segment conditions.

Property Name	Re- quired	Default	Description
cache	Yes		Reference to the CoreMedia Cache to be used to store preprocessed segment conditions.

Property Name	Re- quired	Default	Description
<code>contentRepository</code>	Yes		Reference to the content repository containing the segment content items.
<code>contextName</code>	Yes		Name to be used for the context containing the segment properties.
<code>pathToSegments</code>	No	<code>/System/personalization/segments</code>	Repository folder in which to look for segment content items.
<code>segmentDocType</code>	No	<code>CMSegment</code>	Name of the content type used to represent customer segments.
<code>conditionPropertyName</code>	No	<code>condition</code>	Property of the segment content type that contains the segment conditions.

Table 3.6. Properties of `SegmentSource`

## Configuring the property editor used for segment conditions

`ConditionsField` is a property editor for conditions. This editor is configured similar to the `SelectionRuleField` by supplying the list of supported condition types and their mapping to user profile properties.

## Configuring the `SelectionRulesField` to offer conditions on customer segments

To enable conditions on customer segments in the `SelectionRulesField` property editor, configure the `SegmentCondition` component. Make sure its `propertyPrefix` attribute matches the name of the context object used for storing segments in the *CAE*.

## 3.3.5 Working With Scoring

Scoring is a simple means to abstract an individual user's behavior on a website. In general, the idea is to assign scores to certain observable events and to combine these scores with the user's current scores whenever the events are observed.



**NOTE**

Please note that profiling user behavior as well as taking automated decisions based on this profiling may be restricted by applicable privacy law and may require specific user consent to be obtained and may depend on how you implement the Adaptive Personalization module for your project.

**Example**

Assume the pages on a website are tagged with keywords and you want to keep track of how often the user visits pages tagged with a specific keyword. In this scenario, a visit on a page is an observable event, and the scores are the counters associated with each keyword. Whenever the user visits a page, the scores of all associated keywords are incremented by 1.

*CoreMedia Adaptive Personalization* supports scoring via the `ScoringContext`. It manages a set of scores and uses a `ScoringStrategy` to update scores if events are observed.

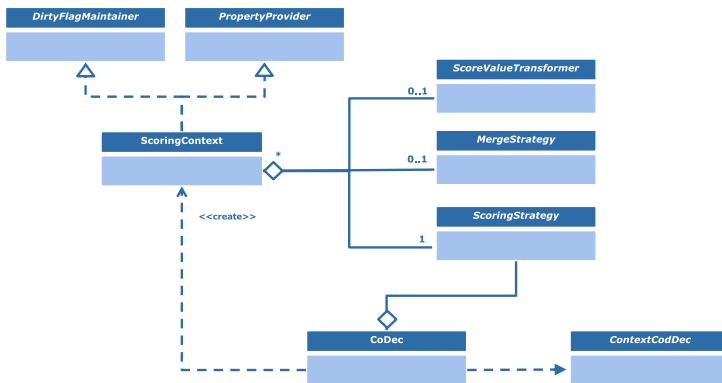


Figure 3.13. Scoring classes

*CoreMedia Adaptive Personalization* comes with a set of predefined scoring strategies:

- `CountScoring` This strategy simply counts the occurrence of events. That is, for each supplied event, the corresponding score is incremented. This strategy can be used to implement the keyword scenario described above.



- `PercentageFromMaxScoring` This strategy weights each score by its percentage of the maximum score value. For each event, a score of the corresponding key is maintained and incremented by 1 whenever the event is observed.
- `PercentageFromTotalScoring` This strategy weights each score by its percentage of the sum of all scores. For each event, a score of the corresponding key is maintained and incremented by 1 whenever the event is observed.

Going back to the keyword example, assume that page A is tagged with keywords 'foo' and 'bar', and page B is tagged with 'bar'. Further, assume that a new user visits page A once and page B twice. Here is the table of scores that result from applying the different strategies:

Strategy	foo	bar
CountScoring	1	3
PercentageFromMaxScoring	1/3	3/3
PercentageFromTotalScoring	1/4	3/4

Table 3.7. Example results

In addition to the application specific scores, two general scores are maintained by all three strategies:

- `__max__` contains the maximum score of all scores maintained by the context
- `__total__` contains the current total of all scores maintained by the context

The scoring strategies are interchangeable, that is, if you start with one you can reconfigure your system later to use a different one without losing any data.

## Configuring a ContextSource to use the ScoringContext

`ScoringContext` provides its own `ContextCoDec` implementation in the static inner class `ScoringContext$CoDec`. The codec can be used in any source that accepts a `ContextCoDec` or a `ContextFactory`. Because the `ScoringContext` requires a `ScoringStrategy`, you must inject the strategy you want to use for all decoded and created contexts into the codec.

Here is an example of how to configure a `CookieSource` to use a `ScoringContext` with the `PercentageFromTotalScoring` strategy:

```
<bean id="scoringCookie"
class="com.coremedia.personalization.context.collector.CookieSource"
type="singleton">
  <property name="contextCoDec">
    <bean class="com.coremedia.personalization.scoring.
```

```

        ScoringContext$CoDec">
    <property name="strategy">
        <bean class="com.coremedia.personalization.scoring.
            PercentageFromTotalScoring"/>
    </property>
</bean>
</property>
<property name="contextName" value="scoringContext"/>
</bean>

```

## Writing your own ScoringStrategy

Writing your own scoring strategy is as simple as implementing the `ScoringStrategy` interface. Keep in mind that your implementation must be thread-safe because it is typically shared by several `ScoringContext` instances. Ideally, you simply do not use any modifiable state that is shared among threads.

In typical scenarios, processing events is far more frequent than reading scores. Thus, it's sensible to perform costly updates lazily only when scores are requested. To this end, your strategy may implement the `ScoreValueTransformer` interface. If a strategy implements this interface, the `ScoreValueTransformer#transform` method is called by the `ScoreContext#getScore` method and its result returned as the score. The supplied strategies `PercentageFromMaxScoring` and `PercentageFromTotalScoring` use this to perform the normalization of values only at the time of access.

The third interface that is relevant to scoring is `MergeStrategy`: A `ScoringStrategy` that allows merging of two sets of scores should implement this interface. Merging of scores is useful if you want to combine data from different context. A typical scenario is as follows: A user logs into your site and his scoring context is persisted in a database. Later, the user returns to the site and browses without logging in, thus new scores are collected. Then, with the user logging in, the formerly persisted data becomes available and can now be merged with the scores collected while the user was anonymous.

If your `ScoringStrategy` implements the `MergeStrategy` interface, a `ScoringContext` using your strategy will be able to perform the `mergeWith` operation.

## Using a ScoringContext to track Keyword Clicks

*CoreMedia Adaptive Personalization* provides the `KeywordInterceptor` for the common use case in which you want to count the keywords associated with the pages a user clicks on. The `KeywordInterceptor` intercepts a `CAE` request after the controller but before the view is rendered and attempts to extract keywords from the 'self' bean in the model that is to be supplied to the view dispatcher. These keywords

are sent as events to the configured `ScoringContext`. See the respective Javadoc for details.

### 3.3.6 Working With Search Queries

You can use queries to the *CoreMedia Search Engine* to dynamically compile parts of your website's pages. Nevertheless, using this method, you do not have context information for your queries. To solve this problem, search functions provided by *CoreMedia Adaptive Personalization* come in handy. They enable you to include context-specific data into your queries, thus providing you with another means to adapt your site to the visitor.

#### Example

You use folders in the CMS repository, that represent a specific customer segment. That is, each folder contains content that will be shown to a user who is member of the respective segment. Now, you compile a page about sports products and want to show content depending on the user's segment. Let's say, Skateboard products for the young urban segment and Golf products for the successful prime-age manager segment. Now, you can use a search query similar to `sports userSegment()`. Where `userSegment()` is a search function that is evaluated at query time and presumably adds the required folder constraint to the query. That is, if the user is in the segment mapped to the folder of id 23, the string actually sent to the search engine would be `sports folderid:23` (assuming `folderid` is the field, IDs of folders get fed to).

*CoreMedia Adaptive Personalization* comes with some generally useful functions in the `com.coremedia.personalization.search` package. Nevertheless, since search functions are very project specific, you will use these delivered functions as a starting point for your own functions.

- In [Section 3.3.6.1, "Evaluation Of Search Functions" \[53\]](#) you will learn how search functions are evaluated.
- In [Section 3.3.6.2, "Implementing Search Functions" \[54\]](#) you will learn how to write your own search functions.

#### 3.3.6.1 Evaluation Of Search Functions

Typically, you access your *Search Engine* from within a content bean implementation. Within the bean, you will do the following things:

1. Read the query string from a property of the associated Content object

2. Use a *Search Engine* connection to send the query to the *Search Engine*
3. Retrieve the result object
4. Iterate over the results to map them to content beans which can then be provided to the template for rendering.

If your query string contains calls to search functions, you can't just provide the string to the *Search Engine* because the *Search Engine* doesn't know what to do with the functions. So, you first got to evaluate the functions and replace their calls by their respective results, thus creating a syntactically correct query string that can be send to the engine. Evaluation and replacement of search function calls is performed by the `SearchFunctionPreprocessor`.

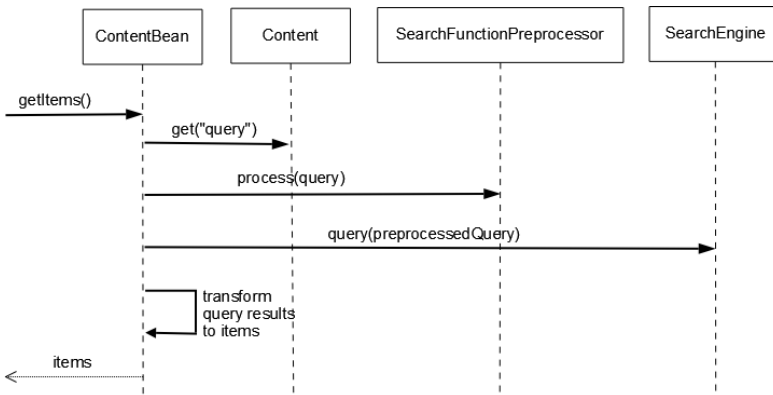


Figure 3.14. Evaluating a Search Function

### 3.3.6.2 Implementing Search Functions

The `SearchFunctionPreprocessor` maintains a map of search function names and implementations. The registered name of a function is used to call it from within the query string and, if a call is encountered in the query, it's replaced by the result of the executed implementation.

A search function implementation is an instance of a Java class that implements the `SearchFunction` interface. This interface contains a single method only, `evaluate`. The preprocessor supplies the `ContextCollection` associated with the current request and all function arguments supplied in the function call to this method.

What's happening inside of the evaluate method is entirely up to you. The only constraint is that the resulting string should be a syntactically valid (sub)query to your *Search Engine*.

Search function arguments are in the form `<parameter name>:<value>` and are supplied to a function in an instance of class `SearchFunctionArguments`. The latter provides a number of convenience methods to access arguments and convert their values to appropriate types.

If you implement your own search functions, make sure they are thread safe because the `SearchFunctionPreprocessor` is usually declared as a singleton Spring bean. This means that several request threads may access the preprocessor and the registered search functions in parallel.

### Example

The search function `SolrGeneralProperty`, which is provided as part of *CoreMedia Adaptive Personalization*, provides access to a general context property from within a query in Solr syntax. If it is registered with the `SearchFunctionPreprocessor` under the name "contextProperty", preprocessing the query `recommendations contextProperty(property:personal.name, field:user)` calls the `evaluate` method of the registered instance of `SolrGeneralProperty` supplying the current `ContextCollection` and function arguments `property:personal.name` and `field:user`.

`SolrGeneralProperty` looks up the context object named "personal" in the `ContextCollection` and retrieves the value of its property name, which is assumed to be "bob". Then, it concatenates the field argument with the retrieved name to the valid Solr search query "user:bob" and returns this string.

The preprocessor replaces the function call by the returned string, resulting in the query "recommendations user:bob".

### Exception Handling

The `SearchFunctionPreprocessor` wraps any exception that is thrown while evaluating a search function's `evaluate` method in a runtime exception of type `SearchFunctionEvaluationException`. In addition to the exception cause, the `SearchFunctionEvaluationException` is supplied with the name under which the executing search function is registered.

Implementations of `SearchFunction` are encouraged to use one of the `Argument*Exception` classes if there is any problem with the arguments supplied in `SearchFunctionArguments`. These exception classes are known to the *CoreMedia Studio* integration provided as part of *CoreMedia Blueprint* and are used to provide improved feedback to *CoreMedia Studio* users in case they make any mistakes using search functions.

## Spring Configuration

The `SearchFunctionPreprocessor` is intended to be configured as a Spring bean. It is thread safe so using the default Spring singleton scope is fine.

Here is an example configuration that registers three search functions with the processor:

```
<bean class="com.coremedia.personalization.search. \
    SearchFunctionPreprocessor">
  <property name="functions">
    <map>
      <entry key="userKeywords">
        <bean class="com.coremedia.personalization. \
            search.solr.SolrScoredKeys">
          <property name="defaultLimit" value="5"/>
          <property name="defaultThreshold" value="0"/>
          <property name="defaultContextName" value="keyword"/>
          <property name="defaultField" value="keywords"/>
        </bean>
      </entry>
      <entry key="userSegments">
        <bean class="com.coremedia.personalization. \
            search.solr.SolrSegments"/>
      </entry>
      <entry key="contextProperty">
        <bean class="com.coremedia.personalization.search. \
            solr.SolrGeneralProperty"/>
      </entry>
    </map>
  </property>
</bean>
```

### 3.3.6.3 Adding Help Texts

In order to support the users of your search functions, you can add a help text to *Core-Media Studio*. This text might describe, for example, how to call the function, what the function does and what arguments are required.

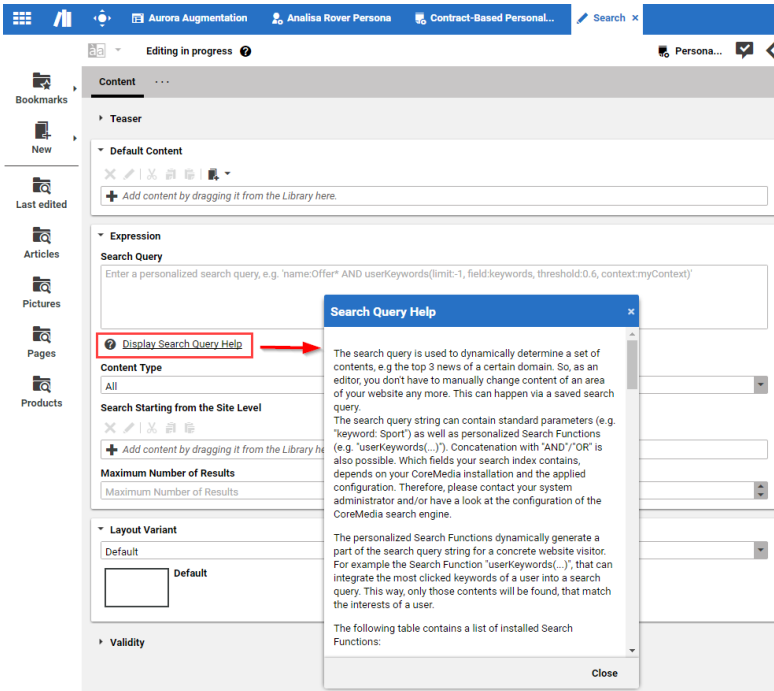


Figure 3.15. Example of a help text

To add a help text, *CoreMedia Adaptive Personalization* provides the `SearchQueryHelper` component in `cap-personalization-ui`. The help text is written as an HTML file. Proceed as follows:

Write your help text and store the file as `SearchFunctionsHelp.html` in the directory `sencha/resources/p13n-search-query-help/` of your web application.

Add the `SearchQueryHelper` with the tag `<perso:SearchQueryHelper>` to the content form where it should be shown.

### 3.3.7 Localizing the Studio Plugin

The Studio plugin of *CoreMedia Adaptive Personalization* enhances *CoreMedia Studio* with several UI components. You can adapt any labels shown by these components. To do so, override the respective properties in the global *CoreMedia Studio Resource Bundle* either programmatically or by using a property file.

All changes that are done programmatically have to be applied in the `init` method of the class `PersonalizationEditorPlugin` that is located in the `p13n-studio` module of the CoreMedia Blueprint development workspace.



## 4. Client-side Personalization

Client-side Personalization decides on the user client software (mostly the browser) which content to show. The rules are defined in a personalization system, such as *CoreMedia Engagement Cloud*.

Client-side Personalization consists of a core extension (`p13n-core`) and multiple adapter extensions. While the `p13n-core` is mandatory, the adapter is chosen for the personalization system which is integrated. This mentioned, the following extensions currently exist:

- The `p13n-core` extension which offers the basis functionality used by the adapter extensions. This extension must always be installed.
- The `p13n-adapter-cmec` extension which connects with *CoreMedia Engagement Cloud*.
- The `p13n-adapter-monetate` extension which connects with Monetate.
- The `p13n-adapter-generic` extension which connects with Evergage and Dynamic Yield.

You must always install `p13n-core` as the base extension required by the other ones.

Based on the capability of the provider the following use cases are supported:

- Optimization and Testing: Run experiences with split traffic allocation (A/B/n tests) and targeting
- Personalization: Run experiences with machine learning and targeting
- Segmentation: Use targeting capabilities of the provider to serve custom content experiences to different user segments

For all these use cases, content editors in *CoreMedia Studio* can easily create and manage content and connect them to the provider for optimized and personalized delivery.

### `p13n-core` Extension

The CoreMedia `p13n-core` extension provides the base functionality for integrating third party web personalization, optimization, and testing providers with CoreMedia.

### `p13n-adapter-cmec` Extension

*CoreMedia Engagement Cloud* is the CoreMedia provider of personalization, targeting and optimization solutions for websites.

The `p13n-adapter-cmec` extension for *CoreMedia Blueprint* enables you to use a technology directly from the CoreMedia ecosystem.

### `p13n-adapter-monetate` Extension

Monetate is a well known provider of personalization, targeting and optimization solutions for websites.

The `p13n-adapter-monetate` extension for *CoreMedia Blueprint* enables you to use Monetate's technology to personalize, target and test content in an easy way to build a whole new customer experience.

### `p13n-adapter-generic` Extension

The `p13n-adapter-generic` adapter is a generic means to connect third party web personalization, optimization and targeting solutions that don't provide dedicated client APIs to query metadata state.

The current implementation has been tested with the following systems:

- Dynamic Yield
- Evergage

## Architecture

For all supported personalization providers, a client-side integration approach is used:

The provider's JavaScript tag is rendered into the head of the generated HTML output. The script tag loads and calls additional JavaScript code which evaluates the current request and determines the actions to run on this page, for example which variant to show from what experience. When actions related to CoreMedia experiences are run, custom CoreMedia JavaScript callbacks are triggered, loading personalized content items from the CAE via AJAX, replacing default content items on the page. Using this approach offers two main benefits:

In addition to CMS content actions, all capabilities of the provider can be used for use cases that are currently not supported by CoreMedia. The generated CoreMedia pages are not dependent on the personalization actions and can be cached.

## Content Placement and Rendering Restrictions

Client-side Personalization bases on a few assumptions that affect the way you can place content and render content:

- Experiences and segments target single teasable items only - not collections. This means it is not possible to replace an item with a collection of items and vice versa.
- A baseline item must always exist, therefore, it is not possible to add content to the variants/segments while the baseline remains empty. Moreover, for all variants/segments a content item must be defined, which means it is not possible to add a baseline content item and leave some or all the variant/segment content empty.
- The design of segments follows the idea that a user is part of only one segment. There is no ruleset to combine different segments to target content.
- Different experiences/segmentation documents cannot target the same baseline slot.

# 4.1 Installing Client-Side Personalization

Using CoreMedia Client-side Personalization requires the installation of at least two extensions (see [Section 4.1.5, "Project Extensions"](#) in *Blueprint Developer Manual* for more details about extensions):

- The `p13n-core` extension at <https://github.com/coremedia-contributions/p13n-core>.
- At least, one of the adapters `p13n-adapter-cmec` (<https://github.com/coremedia-contributions/p13n-adapter-cmec>), `p13n-adapter-monetate` (<https://github.com/coremedia-contributions/p13n-adapter-monetate>) or `p13n-adapter-generic` (<https://github.com/coremedia-contributions/p13n-adapter-generic>) to connect with a third-party system.

You will find the extensions in the following repositories:

- <https://github.com/coremedia-contributions/p13n-core>  
The core extensions that must be installed.
- <https://github.com/coremedia-contributions/p13n-adapter-cmec>  
This adapter connects to *CoreMedia Engagement Cloud*.
- <https://github.com/coremedia-contributions/p13n-adapter-monetate>  
This adapter connects to Monetate and provides a direct integration using the Kibo metadata API.
- <https://github.com/coremedia-contributions/p13n-adapter-generic>  
This adapter provides a generic integration base for providers without a client API. Experiences must be mirrored in the CoreMedia system with a special content type. Built-in support is included for Dynamic Yield and Evergage.

You can either add the extension repositories as Git submodules, the recommended approach, or copy them into your Blueprint workspace in the `modules/extensions` folder. Copying the extensions requires more work when upgrading the Blueprint workspace to newer releases. In the following section you will learn how to add them as submodules.

## Adding Extension as Submodule

If you plan to customize the extensions, first create a fork of the repositories and add your forks as submodules. Otherwise, you can simply add the CoreMedia repositories as submodules as shown in the following example.

Add the core and adapter extensions to the Blueprint workspace as Git submodules as follows (this example uses the *CoreMedia Engagement Cloud* adapter). To do this, open a terminal window and run the following commands:

```
cd /<blueprint-root-dir>
mkdir -p modules/extensions
git submodule add https://github.com/coremedia-contributions/pl3n-core.git
modules/extensions/pl3n-core
git submodule add
https://github.com/coremedia-contributions/pl3n-adapter-cmec.git
modules/extensions/pl3n-adapter-cmec
git submodule init
```

### Example 4.1. Adding submodules

After the submodules are added, go to each submodule directory and check-out the branch matching your Blueprint version.

```
cd /<blueprint-root-dir>/modules/extensions/pl3n-core
git checkout -b <branch-name>
cd ../pl3n-adapter-cmec
git checkout <branch-name>
```

### Example 4.2. Checkout branch in submodule

Then commit the changes to the submodules:

```
cd /<blueprint-root-dir>/modules/extensions
git add pl3n-core
git add pl3n-adapter-cmec
git commit -m 'Add personalization submodules'
```

### Example 4.3. Commit changes to submodules

Now, you have to activate the extensions.

## Activating the Extensions

Run the extensions tool (see [Section 4.1.5, "Project Extensions"](#) in *Blueprint Developer Manual* for more details about the extensions tool) in `workspace-configura`

tion/extensions to activate the extensions like this (here, the core and the *CoreMedia Engagement Cloud* extensions are activated):

```
mvn extensions:sync
mvn extensions:sync -Denable=p13n-core,p13n-adapter-cmec
```

### Example 4.4. Activate extensions

Now you are done with the installation and activation of the extensions. In order to work with the extensions, you have to configure them, as described in the next sections.

## Updating the Extensions

If you are upgrading your Blueprint workspace to another major release, an update of the personalization extension may be required. Check the extension's repositories for the available branches and select the branch matching your Blueprint release version or the highest release version lower than your Blueprint version.

Update the extension's submodules by opening a terminal window and running the following commands (the example shows the steps for the *CoreMedia Engagement Cloud* adapter):

```
cd /<blueprint-root-dir>/modules/extensions
cd p13n-core
git fetch
git checkout <branch-name>
cd ..
git add p13n-core

cd p13n-adapter-cmec
git fetch
git checkout <branch-name>
cd ..
git add p13n-adapter-cmec/

git commit -m 'Update personalization submodules to release xxxx.x'
```

### Example 4.5. Updating an extension

## 4.2 Client-Side Personalization Configuration and Operation

This section describes, how you configure Client-side Personalization. Getting Client-side Personalization working contains the following steps:

1. Install the `p13n-core` extension and at least one adapter extension. See [Section 4.1, "Installing Client-Side Personalization" \[62\]](#) for details.
2. Configure the `p13n-core` extension which is the basis for the adapter extensions. See [Section 4.2.1, "Configuring the p13n-core Extension" \[65\]](#) for details.
3. Configure the installed adapter extensions. See [Section 4.2.2.1, "CoreMedia Engagement Cloud - p13n-adapter-cmec Extension" \[67\]](#), [Section 4.2.2.2, "Monetate - p13n-adapter-monetate Extension" \[69\]](#) and [Section 4.2.2.3, "Evergage & Dynamic Yield - p13n-adapter-generic Extension" \[79\]](#) for details.

### 4.2.1 Configuring the p13n-core Extension

The `p13n-core` extension adds, for example, the following features:

- Content types
- API definition
- Studio forms and preview
- Studio backend implementation
- *CAE* core logic

In order to use the `p13n-core` extension you have to extend your frontend theme with a brick

#### 4.2.1.1 Frontend Integration

The frontend theme can be extended with a brick that acts on the callbacks received from the personalization provider. The brick is responsible for loading variant fragments and displaying the baseline content if no variant is triggered. The provider's script tag is independently included in the adapter *CAE* extensions.

Together with a small piece of JavaScript proxy code injected into the HTML head by the *CAE* extension, the brick provides the callback functions called from the third-party

service if a variant or segment is to be displayed and replaces the default content fragment with the variant loaded via AJAX.

The frontend code adds the object `cm_p13n` to the `window` object providing the following methods:

- `pushVariant (variantId:String)`  
Activates the variant with the given ID.
- `pushSegment (segmentName:String)`  
Activates the segment with the given name.
- `exchangeVariant (variantId:String, contentId:String)`  
Replaces a variant when using the preview icon of a variant in the content item tab.
- `completed (providerId)`  
Called when the third-party service is finished and displays the baseline for all fragments where no variant or segment is active.

In addition, an event listener is installed for integration with the Studio preview.

### Adding the brick to the theme

Add the brick `p13n-dynamic-include` as dependency to your theme (`package.json`).

```
pnpm add @coremedia/brick-p13n-dynamic-include
```

## 4.2.1.2 Fragment Caching

Contrary to CoreMedia's Adaptive Personalization which resolves variant selection on the server side, the client-side personalization resolves everything in the client's browser. Thus, the fragments included via AJAX do not require any user specific server side processing and are cacheable for a limited time.

### CAE Caching

To enable the required HTTP caching headers add the following line to the live *CAE's* `application.properties` file and adjust the cache time to your need:

```
cae.cache-control.for-url-pattern[/dynamic/fragment/experience/item/**].max-age=5me
```



## Caching in a commerce-led Scenario

If you are running the client-side personalization in a commerce-led scenario, the cache headers from the *CAE* might not be passed through the eCommerce delivery system. To counter this, add static rules to your CDN, allowing caching and storing of fragments with the path `<prefix>/dynamic/fragment/experience/item/**` on the client's side.

## 4.2.2 Integration adapters

As mentioned multiple adapters are provided by CoreMedia to integrate systems into *CoreMedia Content Cloud*. This section explains the configuration for each system and how the adapter extensions have to be configured to make use of the prefabricated functionality.

### 4.2.2.1 *CoreMedia Engagement Cloud* - p13n-adapter-cmec Extension

The `p13n-adapter-cmec` integrates the *CoreMedia Engagement Cloud* into the *CoreMedia Content Cloud*. The upcoming sections cover the configuration and usage of the integration.

## Configuration in *CoreMedia Studio*

The adapter provides features which need some configuration. The configuration is provided as a *Studio* settings document and the document has to be linked to the site. The settings are site specific because they are connected to a region in *CoreMedia Engagement Cloud*. Multiple sites can be connected to the same region. In those cases the settings document may be created outside of the sites and linked to multiple sites. As usual credentials are strongly recommended to be stored secured. All settings are required to be set.

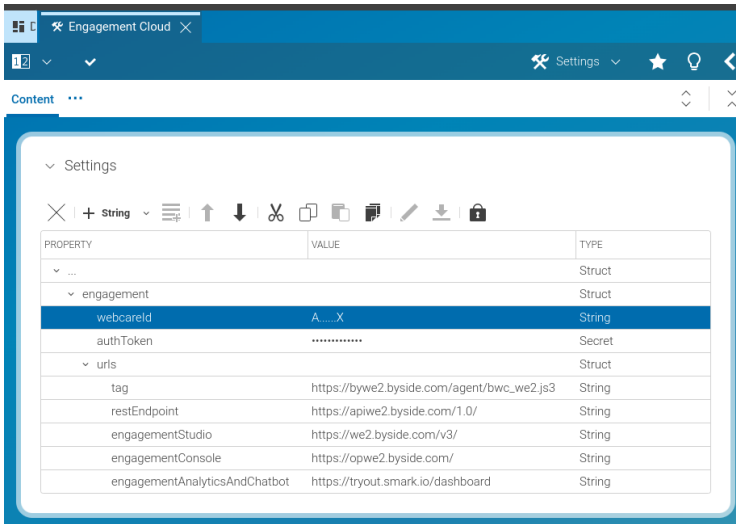


Figure 4.1. CoreMedia Engagement Cloud Settings

Setting	Example	Description
webcareid		The webcare id of the <i>CoreMedia Engagement Cloud</i> account the site is connecting to.
authToken		The authorization token for the webcare id.
urls.tag	https://bywe2.byside.com/agent/bwc_we2.js	The region specific URL of the <i>CoreMedia Engagement Cloud</i> tag.
urls.restEndpoint	https://apiwe2.byside.com/1.0/	The region specific URL of the <i>CoreMedia Engagement Cloud</i> rest endpoint.
urls.engagement-Studio	https://we2.byside.com/v3/	The region specific URL of the <i>CoreMedia Engagement Cloud</i> Studio. Used to provide easy access via the application menu and links to segments as well as profiles.
urls.engagement-Console	https://opwe2.byside.com/	The region specific URL of the <i>CoreMedia Engagement Cloud</i> Console. Used to

Setting	Example	Description
		provide easy access via the application menu.
urls.engage- mentAnalyticsAnd- Chatbot	https://tryout.smark.io/dashboard	The region specific URL of the <i>CoreMedia Engagement Cloud</i> Analytics and Chatbot. Used to provide easy access via the application menu.

Table 4.1. *CoreMedia Engagement Cloud* properties for site connection

## Segmentation

One of the *Client-side Personalization* main functionality is the segmentation. To use the segmentation a document *Segmentation* has to be created and Segments with linked content added. While other adapters are not able to fetch segments from an integrated system the *CoreMedia Engagement Cloud* integration fetches the segments from *CoreMedia Engagement Cloud*. *CoreMedia Engagement Cloud* handles two kinds of segments - Segments and Profiles. The integration consolidates both as *Client-side Personalization* segments. Therefore, segments and profiles from *CoreMedia Engagement Cloud* are selectable in a segmentation document as segments.

### 4.2.2.2 Monetate - p13n-adapter-monetate Extension

The `p13n-adapter-monetate` extension connects the CoreMedia system with the Monetate personalization platform.

Configuring the `p13n-adapter-monetate` extension requires the following steps:

1. Enabling the Monetate connection in Studio (see [Section "Connecting CoreMedia Content Cloud with Monetate" \[70\]](#) for details).
2. Creating experiences for different use cases (see [Section "Creating Experiences in Monetate" \[72\]](#) for details).

## Connecting *CoreMedia Content Cloud* with Monetate

To connect *CoreMedia Content Cloud* with the Monetate system, you have to connect the *CAE* and *Studio Server* with Monetate and configure each site that should use the Monetate connection.

### Configuring the Connection

To connect *CoreMedia Content Cloud* with the Monetate system, proceed as follows:

1. Create an RSA key pair, for example, with `openssl`.
2. Open the Monetate portal and navigate to **Account Settings** → **Sites** → **APIKeys**, and create a new API user.
3. Add the newly generated public key to the API user.
4. Configure the connection in the `monetate-connector.properties` file in `p13n-adapter-monetate-lib/src/main/resources/META-INF`. There, you will find a description of the properties. An example configuration would look as follows:

```
p13n.adapters.monetate.connectors[0].id=coremedia
p13n.adapters.monetate.connectors[0].retailer=coremedia
p13n.adapters.monetate.connectors[0].key-string=MIIBrzBJBgkqhkiG...
p13n.adapters.monetate.connectors[0].api-user=api-0815-connector
p13n.adapters.monetate.connectors[0].tag-uri-template=//se.monetate.net/js/2/{channel}/entry.js
p13n.adapters.monetate.connectors[0].analytics-uri-template=https://marketer.monetate.net/control/{channel}/analytics/{experienceId}/realtime
p13n.adapters.monetate.connectors[0].edit-uri-template=https://marketer.monetate.net/control/{channel}/experience/{experienceId}
p13n.adapters.monetate.connectors[0].filterExpressions[0]=(.*)\\$
p13n.adapters.monetate.connectors[0].filterExpressions[1]=(.*)#
p13n.adapters.monetate.connectors[0].filterMode=exclude
```

*Example 4.6. Example Monetate configuration*

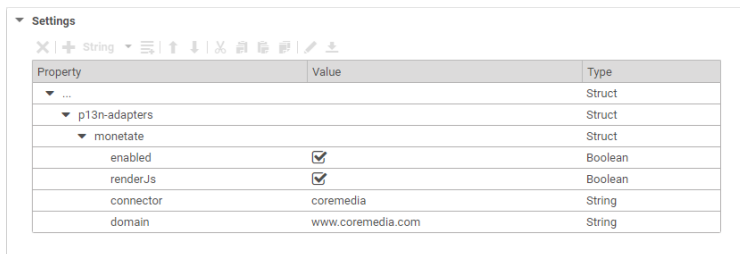
### Excluding Experiences from Studio

In [Section "Creating Experiences in Monetate" \[72\]](#) you will learn how to create experiences in Monetate. However, not all experiences in the Monetate system are applicable for use with a CoreMedia Monetate Experience content item, for example, experiences used for segmentation, the 'Final' experience (see [Section "Creating Experience for Content Masking" \[78\]](#)), which only serves a technical function, and experiences that don't target content (changing layout, for example). These experiences should be hidden from the Studio user and be not selectable in the experience drop-down list.

For this use case, you can apply the properties `monetate.connectors[n].filterMode` and `monetate.connectors[n].filterExpressions[n]` as shown in [section “Configuring the Connection” \[70\]](#)

## Configuring the Site

To connect a site with the Monetate system, you have to create a `Settings` content item and link to it from the root page of the site. In the `Settings` content item set the following properties:



The screenshot shows a configuration interface for a 'Settings' content item. It features a toolbar with various icons and a table of properties. The table has three columns: 'Property', 'Value', and 'Type'. The 'monetate' property is expanded to show its sub-properties: 'enabled' (checked), 'renderJs' (checked), 'connector' (coremedia), and 'domain' (www.coremedia.com).

Property	Value	Type
...		Struct
p13n-adapters		Struct
monetate		Struct
enabled	<input checked="" type="checkbox"/>	Boolean
renderJs	<input checked="" type="checkbox"/>	Boolean
connector	coremedia	String
domain	www.coremedia.com	String

Figure 4.2. Properties for Monetate connection

The properties have the following meaning:

Property	Required	Default	Description
enabled	x		Enables the Monetate integration for this site.
renderJS		true	Instructs the <i>CAE</i> to include the Monetate tag in its head section. Disable in a commerce-led scenario where the shop frontend already includes the Monetate scripts.
connector	x		The ID of the backend connector. See the property <code>p13n.adapters.monetate.connectors[0].id</code> in <a href="#">section “Configuring the Connection” [70]</a> .
domain	x		The domain name. Corresponds to a site in your Monetate account.

Table 4.2. Monetate properties for site connection

## Creating Experiences in Monetate

In order to use Monetate experiences and segments in *CoreMedia Studio*, you need to define experiences that use the CoreMedia JavaScript action.

You can define three types of experiences:

- Experiences for personalization and testing (see [Section “Creating Experiences for Personalization and Testing” \[74\]](#)).
- Experiences for segmentation (see [Section “Creating Experiences for Segmentation” \[76\]](#))
- A technically required experience to minimize visually disturbing effects in the website (see [Section “Creating Experience for Content Masking” \[78\]](#))

### Prerequisites

- Installation of the `p13n-core` extension and the `p13n-adapter-monetate` extension as described in [Section 4.1, “Installing Client-Side Personalization” \[62\]](#)
- Configuration of the `p13n-core` Extension as described in [Section 4.2.1, “Configuring the p13n-core Extension” \[65\]](#).
- Set up of the Monetate integration as described in [Section “Connecting CoreMedia Content Cloud with Monetate” \[70\]](#)

### Setting Up a JavaScript Action

In order to use experiences from Monetate in CoreMedia Sites you first have to create an action in Monetate.

1. Go into the Monetate Action Builder, select **Components** → **Actions** and click **[Create Action]** . The live website opens up and the Monetate overlay is enabled:

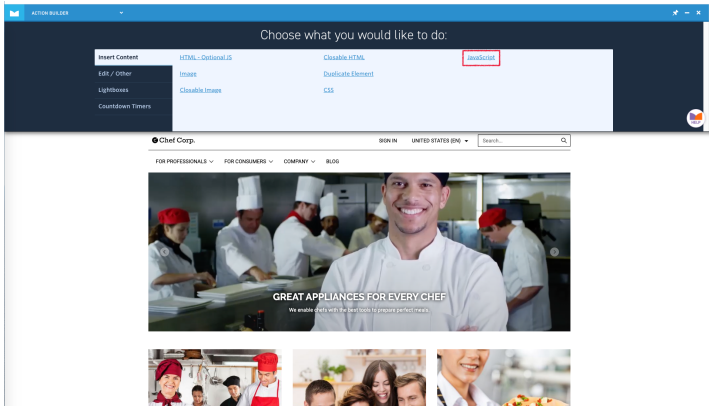


Figure 4.3. Create Action in Monetate

2. Select *JavaScript* and in the following screen set *Only run once?* (1) to *Yes*. Click the arrow (2) to go to the next screen.

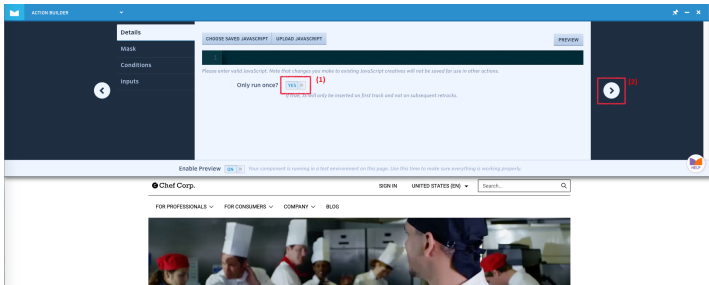


Figure 4.4. Monetate action screen

3. Fill the form fields as shown in the screenshot and click **[Create & Exit]** to create the action and to return to the Monetate portal.

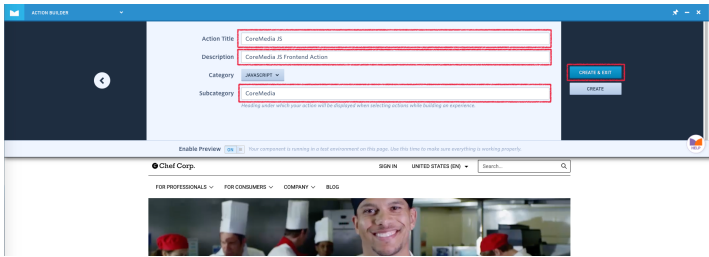


Figure 4.5. Monetate enter data for new action

## Creating Experiences for Personalization and Testing

1. Follow the default steps for creating a Monetate experience. You can select any type of goal (WHY). Apply targeting rules as required (WHO). Then create the variants (WHAT). For each variant add a single action — the CoreMedia JavaScript action created in Section “Setting Up a JavaScript Action” [72].

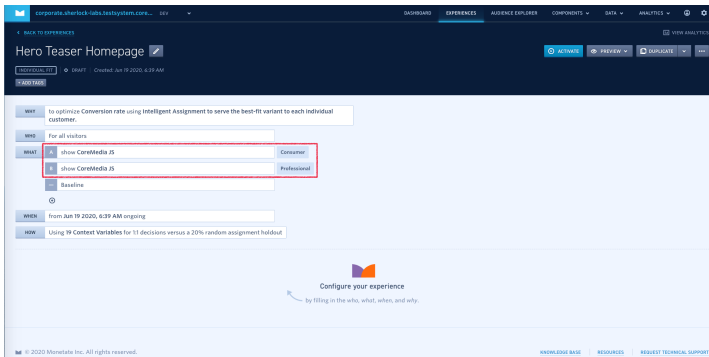


Figure 4.6. Create experience in Monetate

2. Configure each action with the required JavaScript code using one of the following two methods:
  - Look at the URL in your browser. It should look similar to `https://marketer.monetate.net/control/<ACCOUNT>/p/<DOMAIN>/experience/1275940#c1517122:what,a3489594`. Note the number after #c, in this example 1517122. Copy `cm_p13n.pushVariant("<NUMBER>")` to the clipboard where <NUMBER> is replaced by the number above.
  - Change to *CoreMedia Studio*, select your preferred site and open the dashboard. If the dashboard does not contain the experience widget, add it to the dashboard.



Select the newly created experience from the widget's list and open it in a new tab (if the experience is missing, use the reload button to update the list and check the widget's filter settings). In the variants panel each variant has a link button to copy the required JavaScript code the clipboard:

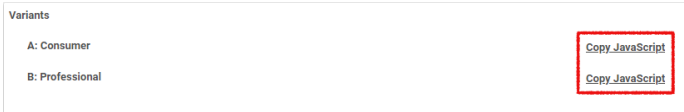


Figure 4.7. Copy JavaScript code from Studio

Click the [Copy JavaScript] button.

Go back to the Monetate portal, select the variant action and paste the copied code into the JavaScript code field.

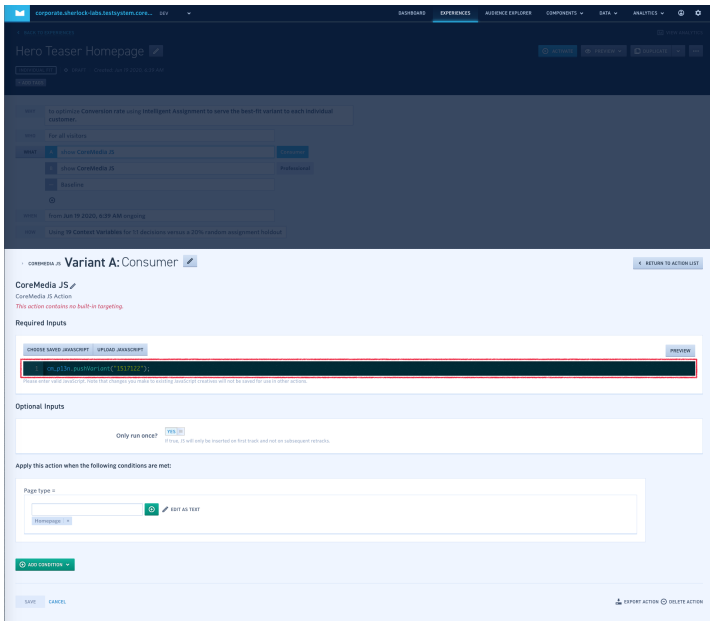


Figure 4.8. Insert JavaScript code into Monetate action

3. If the experience should not be placed on every page, add conditions restricting the action to a single page or set of pages using the [Add Condition] button.

## Creating Experiences for Segmentation

The supported segmentation use case divides the customer base into disjoint sets of segments. For each segment, you want to use, you have to create a `P13NSegment` in *CoreMedia Studio*. You have two ways of applying an experience to a segment:

- Each segment can be used as a direct target rule of an experience.
- The Monetate AI decides about the segment with a single individual fit experience.

For the first case you create an experience for each segment, while for the second case you only create one experience with all segments.

## Create Segments in *CoreMedia Studio*

For the segmentation use case you have to create an `External Segment` content item for each segment you want to use in the `<Site Root>/Options/Personalization/Segments/monetate` folder of the site. For the content name use lower- and upper-case letters, numbers, minus and underscore, no special characters are allowed.

## Direct Target Rule

1. Define an experience with the goal *to serve everyone the same experience*. Apply the required targeting rules and add a single variant with the CoreMedia JavaScript action.

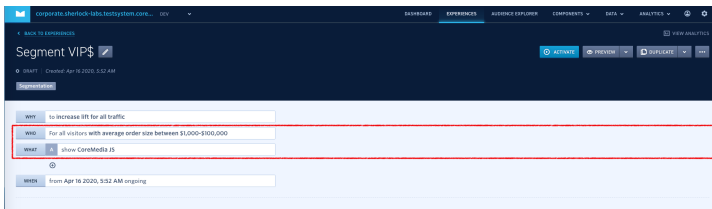


Figure 4.9. Define Monetate experience

2. Select the variant action and paste the following code into the JavaScript code field:

```
cm_p13n.pushSegment("<segment_name>");
```

Replace `<segment_name>` with the name of the corresponding Studio content item, which you have created in section “Create Segments in *CoreMedia Studio*” [76].

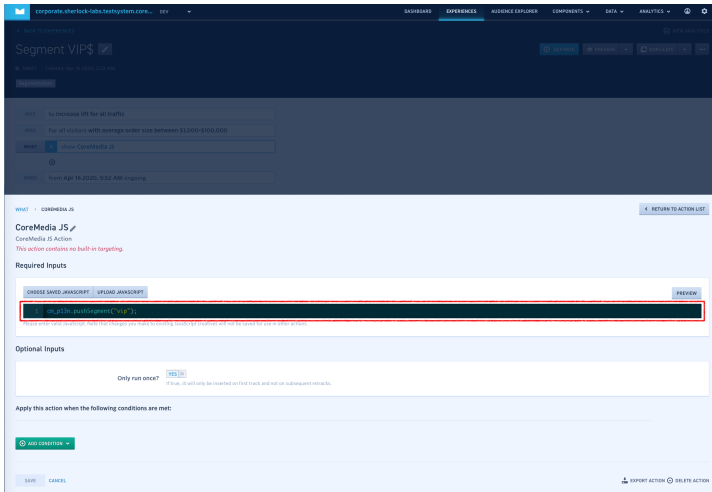


Figure 4.10. Add code to variants

3. Continue with experiences for other segments.

## AI Optimized Content Selection

1. Create a single experience with goal *To optimize my goal with Machine Learning. Individual Fit*. For each segment add a variant.

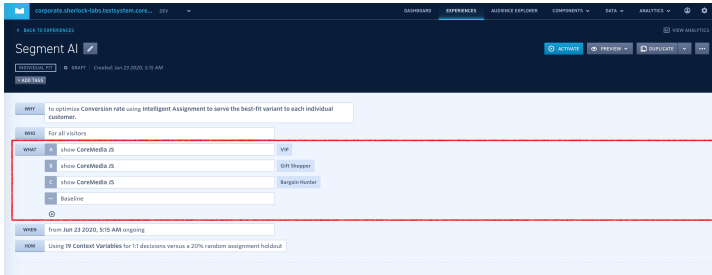


Figure 4.11. Add an experience for AI powered segmentation

For each variant add a single CoreMedia action and paste the following code into the JavaScript code field:

```
cm_p13n.pushSegment("<segment_name>");
```

Replace **<segment\_name>** with the name of the corresponding Studio content item, which you have created in section "Create Segments in *CoreMedia Studio*" [76].

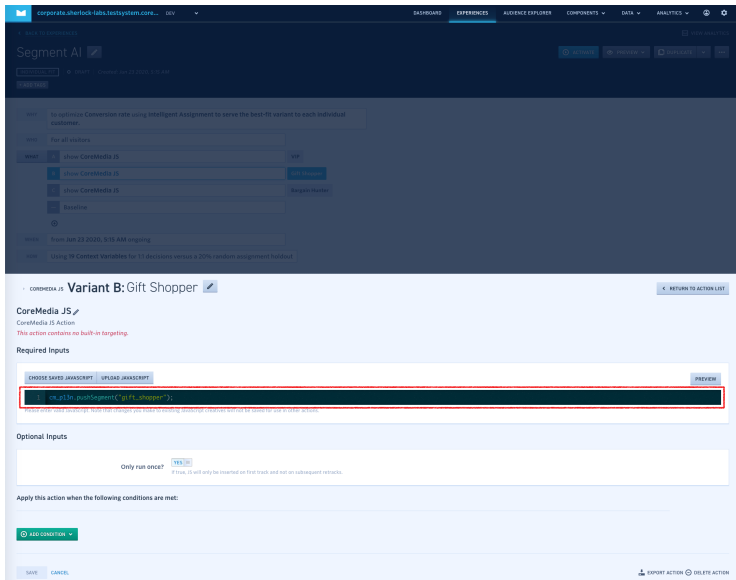


Figure 4.12. Experience for AI powered content selection

## Creating Experience for Content Masking

The CoreMedia JavaScript frontend integration code - triggered by the Monetate Tag - dynamically loads content from the CAE backend via AJAX and injects it into the already displayed page. To minimize visually disturbing effects, such as elements flickering, popping up or moving around, during these page updates it is essential for the CoreMedia code to get notified when Monetate has finished processing all decisions. Hence, a special experience needs to be added, which must always be executed last by placing it at the end of the list of experiences:

1. Create a new experience, for example named *Final*.
2. Select *to serve everyone the same experience* as the goal. Don't add any targeting, let it apply to all visitors.

3. Add the CoreMedia JavaScript action to its single variant and insert the following code: `cm_p13n.completed('monetate');`
4. Save and return to the experience overview.
5. Place the experience at the bottom of the list by giving it the highest priority value.

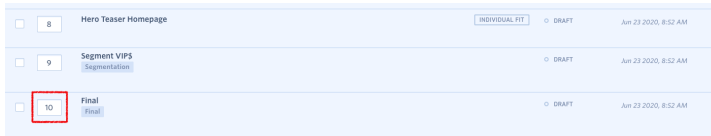


Figure 4.13. Place Final experience

### 4.2.2.3 Evergage & Dynamic Yield - p13n-adapter-generic Extension

The generic adapter allows you to connect with Evergage and Dynamic Yield.

Configuring the `p13n-adapter-generic` requires the following steps:

- Enabling Evergage or Dynamic Yield Connection in Studio (see [Section “Connecting Evergage and Dynamic Yield with Studio” \[79\]](#)).
- Creating CMExperienceDefinition content items in Studio to mirror the experiences defined in Evergage and Dynamic Yield. See [Section “Creating Experience Definitions in Studio” \[81\]](#).
- Creating experiences in Evergage and Dynamic Yield. See [Section “Creating Experiences for Testing or Personalization” \[83\]](#) and [Section “Creating Experiences for Dynamic Yield” \[87\]](#).

## Connecting Evergage and Dynamic Yield with Studio

For both integrations, you have to create a `Settings` content item in your site and link it from the root page of the site. The `Settings` items need to have the following properties:

### Evergage Settings Content Item

The properties need to have the following values:

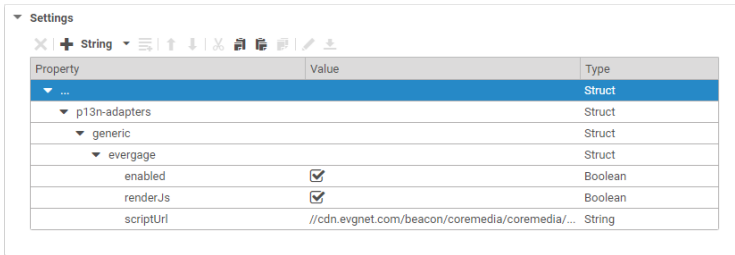


Figure 4.14. Evergage settings item

- enabled** Required. Enables the Evergage integration for this site.
- renderJS** Optional. Instructs the CAE to include the Evergage script link in its head section. Disable in a commerce-led scenario where the shop frontend already includes the script. Defaults to true if missing.
- scriptUrl** Required. The URL of the Evergage script. Can be obtained from the JavaScript integration page in the Evergage portal (**Web** → JavaScript Integration → Synchronous).

## Dynamic Yield Settings Content Item

The properties need to have the following values:

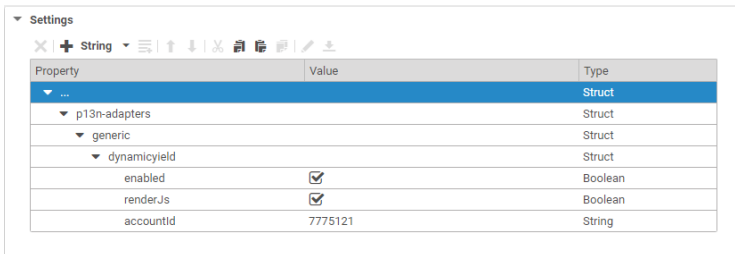


Figure 4.15. Dynamic Yield settings item

- enabled** Required. Enables the Dynamic Yield integration for this site.
- renderJS** Optional. Instructs the CAE to include the Dynamic Yield script in its head section. Disable in a commerce-led scenario where the shop frontend already includes the scripts. Defaults to true if missing.
- scriptUrl** Required. The account ID as displayed on the general settings page in the Dynamic Yield portal.

## Creating Experience Definitions in Studio

In order to integrate personalization providers into Studio you need to mirror the experiences in Studio with special configuration content item of type `CMEExperienceDefinition`.

1. For each site and experience, create `CMEExperienceDefinition` content items in the folder `<Site Root>/Options/Personalization/Experiences/<ProviderID>`. Replace `<ProviderId>` with the key of the provider configuration in the `Settings` content item [see [Section "Connecting Evergage and Dynamic Yield with Studio" \[79\]](#)]. By default, this is "evergage" and "dynamicyield", respectively.

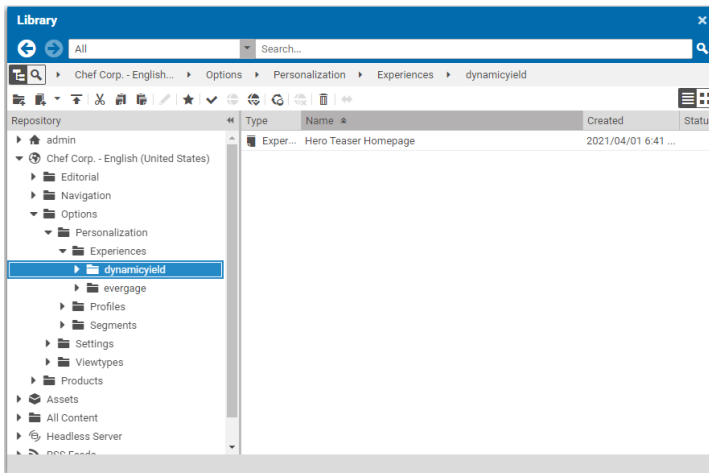


Figure 4.16. Create `CMEExperienceDefinitions` in Studio

The name of the content item is not important, but it is recommended to use the name of the experience, defined in the personalization provider software.

2. In the content item, set a unique name and description and add all variants defined in the third-party system. The concrete name is not important, but it is recommended to use the name of the experience, defined in the personalization provider software.

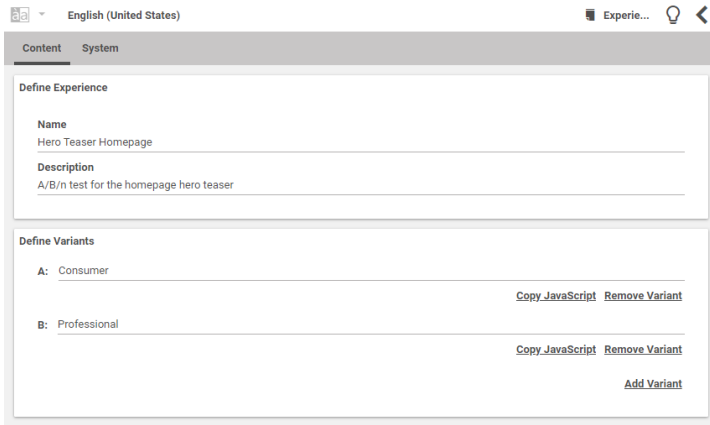


Figure 4.17. Configure experience definition in Studio

Once the definition has been created, it can be selected in experience content items.

## Creating Experiences for Evergage

Evergage uses different naming conventions than the CoreMedia personalization extension and the other supported personalization providers. The following table shows the mapping of Evergage terms to CoreMedia terms:

Evergage	CoreMedia
Campaign	Experience
Experience	Variant

Table 4.3. Evergage naming

### Prerequisites

- Installation of the `p13n-core` extension and the `p13n-adapter-generic` extension as described in Section 4.1, "Installing Client-Side Personalization" [62]
- Configuration of the `p13n-core` Extension as described in Section 4.2.1, "Configuring the `p13n-core` Extension" [65].



- Configuration of the `p13n-adapter-generic` as described in [Section “Connecting Evergage and Dynamic Yield with Studio” \[79\]](#)

## Creating Experiences for Testing or Personalization

1. Create a new web campaign in the Evergage portal. Add the required number of experiences (one for each variation) and switch to the setup menu.
2. Set the global campaign settings like user targeting, goal and metric.
3. Switch to the experiences panel. Set the test mode and traffic allocation, name the experiences, and set each experience to type *Personalize*.

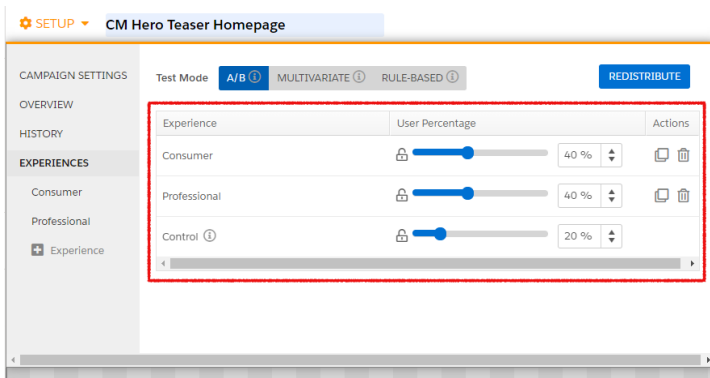


Figure 4.18. Evergage Experiences panel

4. Add the JavaScript snippets to connect the variations to CoreMedia. For this open the mirrored experience definition (see [Section “Creating Experience Definitions in Studio” \[81\]](#)) in *CoreMedia Studio*. For each variation copy the Javascript snippet to the clipboard, change back to the Experience JavaScript tab and paste the JavaScript.

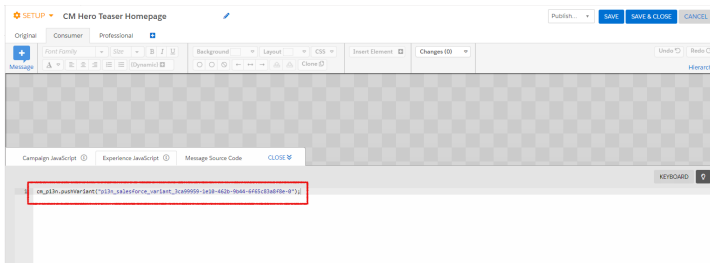


Figure 4.19. Adding JavaScript code to the variants

## Creating Experiences for Segmentation

The segmentation use case allocates the customer base to a set of segments.

### Creating Segments

For the segmentation use case you have to create an `External Segment` content item for each segment you want to use in the `<Site Root>/Options/Personalization/Segments/evergage` folder of the site. For the content name use lower- and upper-case letters, numbers, minus and underscore, no special characters are allowed.

1. Create a new web campaign and add an experience for each segment.
2. Open the setup menu and switch to the experiences panel.
3. Set the test mode to *Rule-Based* and set traffic allocation for *Control* to 0%. Afterwards edit each experience: Set its name and add a targeting rule with the fitting segment.

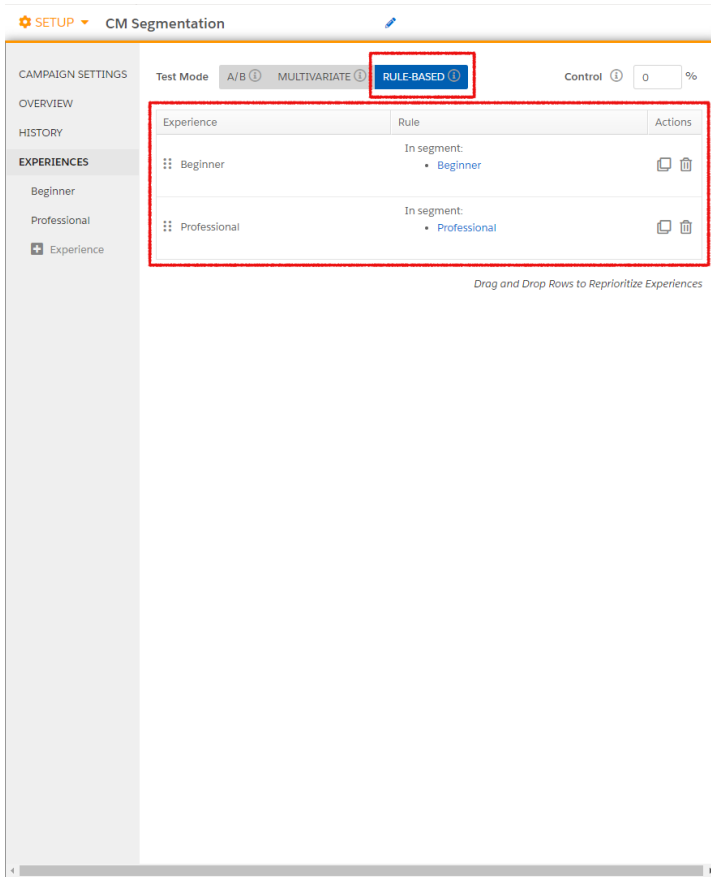


Figure 4.20. Defining Segment experiences in Evergage

4. Add the JavaScript code for connecting the segments to CoreMedia. Add the following code for each experience, substituting the parameter `segment_name` with the name defined in CoreMedia (see Section “Creating Experiences for Segmentation” [84]).

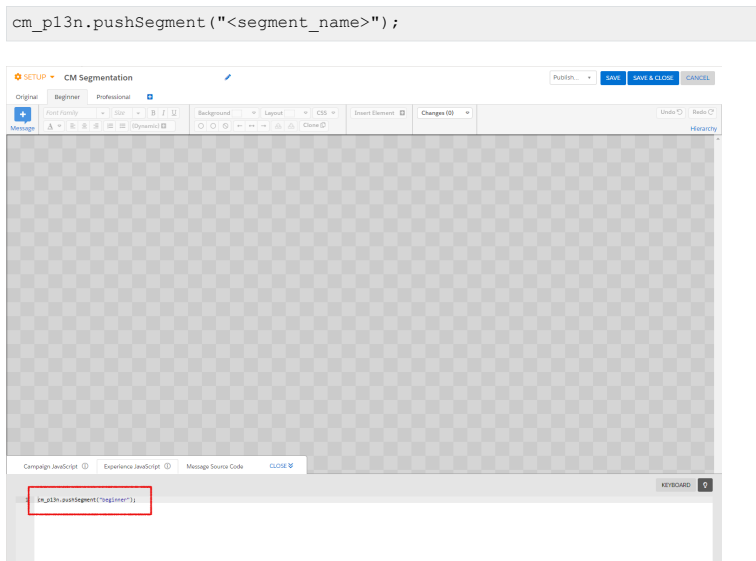


Figure 4.21. Evergage add JavaScript to experience

## Creating Experience for Content Masking

The CoreMedia JavaScript frontend integration code - triggered by the Evergage JavaScript - dynamically loads content via AJAX from the CAE backend and injects it into the already displayed page. To minimize visually disturbing effects, such as elements flickering, popping up or moving around, during these page updates it is essential for the CoreMedia code to get notified when Evergage has finished processing all decisions. Therefore, a special campaign must be added, which must always be executed last by giving it the lowest priority:

1. Create a new campaign, named CM Final.
2. Set its priority to a lower value than all the other CoreMedia campaigns.
3. Set its *Test Mode* to **A/B**.
4. Add a single experience named Final and allocate 100% traffic to it.
5. Set the experience's JavaScript code to: `cm_p13n.completed('evergage');`

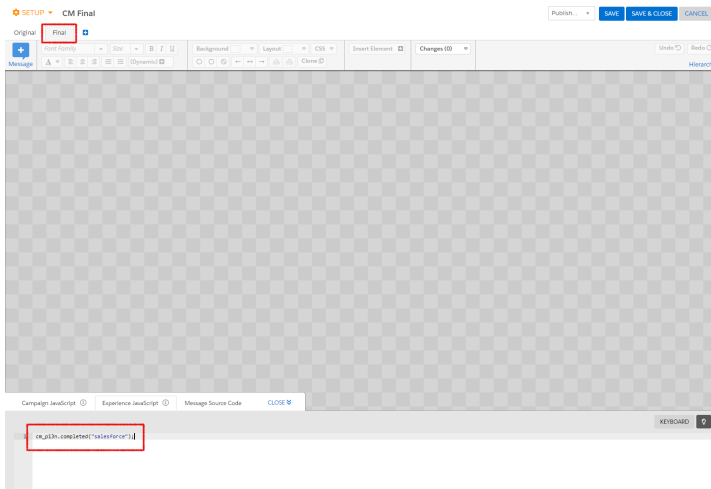


Figure 4.22. Create final experience for Evergage

#### NOTE

Do not set any targeting or other rules, the experience must run on every page load.



## Creating Experiences for Dynamic Yield

### Creating Experiences for Testing or Personalization

1. In the Dynamic Yield portal create a new Custom Code campaign using the following settings:
  - *Trigger*: Page Load
  - *Frequency*: Once per pageview
2. Add a single experience.

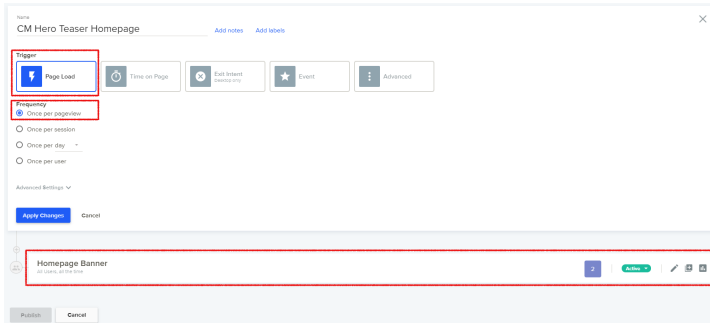


Figure 4.23. Create campaign in Dynamic Yield

3. Open the experience for editing and add the desired targeting. Switch to the *Variations* tab. Choose static or dynamic traffic allocation and select a primary metric. Then add the variations and choose their individual traffic allocation.

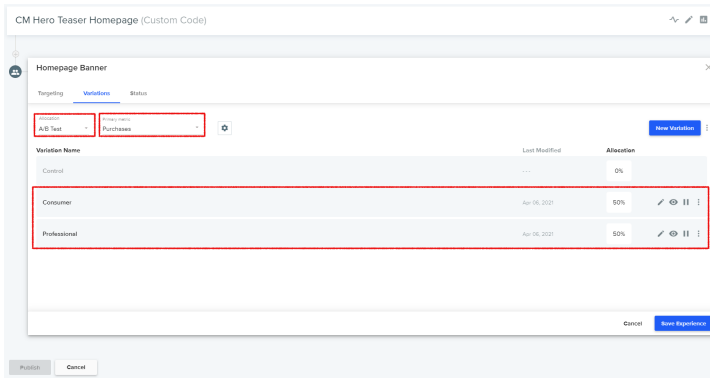


Figure 4.24. Edit Dynamic Yield experience

4. Add the JavaScript code to connect the variations to *CoreMedia Content Cloud*. Open the mirrored experience definitions in *CoreMedia Studio* [see [Section "Creating Experience Definitions in Studio"](#) [81]]. For each variation copy the Javascript snippet to the clipboard, change back to the variation's JavaScript tab and paste the code. Save the variation.

## Creating Experiences for Segmentation

The segmentation use case allocates the customer base to a set of segments.

1. In the Dynamic Yield portal create a new *Custom Code* campaign using the following settings:
  - *Trigger*: Page Load
  - *Frequency*: Once per pageview
2. For each segment add a new experience. If a user can be a member of multiple segments, be sure to prioritize the segments by ordering them accordingly.

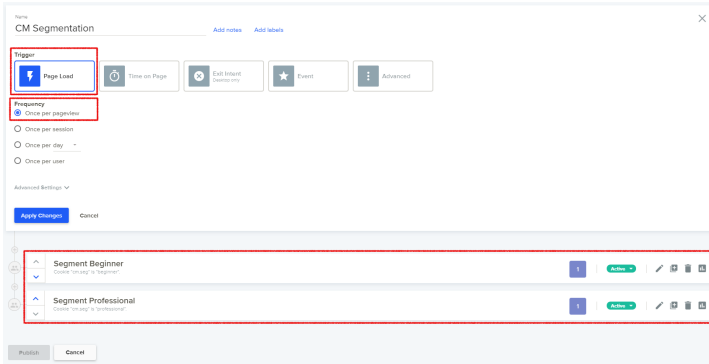


Figure 4.25. Creating campaign for Dynamic Yield segmentation

3. Set up the targeting for each experience and set the traffic *Allocation* to **A/B Test**. Add a single variation with 100% traffic *Allocation*.

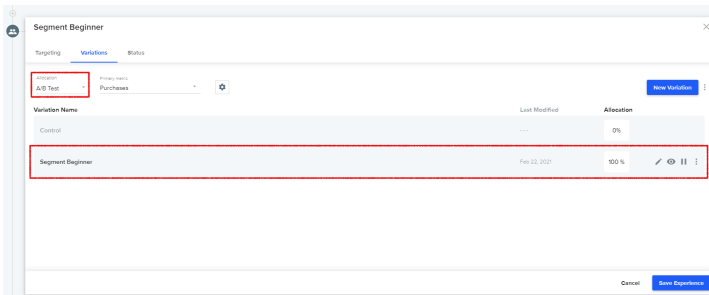


Figure 4.26. Dynamic Yield configure experience for segmentation

4. Add the JavaScript code for connecting the segment to CoreMedia. Add the following code, substituting the parameter *segment\_name* with the name defined in CoreMedia (see Section “Creating Experiences for Segmentation” [84]).

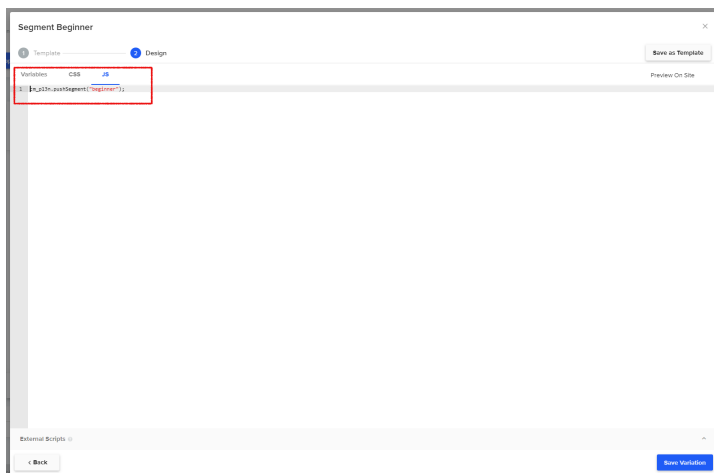


Figure 4.27. Dynamic Yield add JavaScript to segment



## 5. Reference

This chapter lists condition types, content types and supplied context sources for Adaptive Personalization.

# 5.1 Condition Types

The following condition types exist in *CoreMedia Adaptive Personalization*:

Name	Description
SegmentCondition	Used for defining conditions on <b>customer segments</b> . Plugins may use the <code>addPath</code> , <code>removePath</code> and <code>clearPath</code> method to adapt the set of repository paths' that are searched for segment definitions. Supports the <code>addpath</code> plugin provided by <i>CoreMedia Adaptive Personalization</i> .
DateCondition	Used for defining conditions on <b>dates</b> , such as the current date.
StringCondition	Used for defining conditions on <b>string</b> -valued properties.
EnumCondition	Used for defining conditions on properties that can take on a <b>limited set of values</b> .
FloatCondition	Used for defining conditions on <b>float</b> -valued properties.
IntegerCondition	Used for defining conditions on <b>integer</b> -valued properties.
TimeCondition	Used for defining conditions on properties that represent <b>timestamps</b> consisting of hours, minutes, and seconds.
BooleanCondition	Used for defining conditions on <b>Boolean</b> -valued properties.
DateTimeCondition	Used for defining conditions on properties that represent a date and a timestamp, such as March 12, 2011, 15:13:02h
KeywordCondition	Used for defining conditions that test the values of keywords stored as properties. In contrast to the previous conditions, this condition isn't mapped to a property name but a property prefix. The substring following the prefix is assumed to be the keyword.
PercentageKeywordCondition	This corresponds to a <code>KeywordCondition</code> but instead of accepting arbitrary floating point values, it only accepts integers between 0 and 100, which are mapped to a floating point value between 0 and 1. This condition isn't mapped to a property name but a property prefix. The substring following the prefix is assumed to be the keyword.

Name	Description
BooleanPropertiesCondition	<p>A condition that tests whether a Boolean property is set to true. You provide the set of available properties to choose from. This condition is not mapped to a property name but a property prefix. The substring following the prefix is assumed to be the name of the Boolean property.</p> <p>For example, if <code>propertyPrefix="flags"</code> and <code>properties="\{\{\['sports', 'Sport News'\]\}\}"</code>, the UI will show a property <code>Sport News</code>. If selected, the condition <code>flags.sports=true</code> will be added to the respective selection rule.</p>

*Table 5.1. Condition types*

## 5.2 Content Types

*CoreMedia Blueprint* comes with content types suitable for *CoreMedia Adaptive Personalization*

## 5.3 Supplied Context Sources

*CoreMedia Adaptive Personalization* delivers APIs for different context sources (for example, `CookieSource`, `TableSource`) that enable persistence of personal data, however *CoreMedia* only ships example code for the `CookieSource` implementation in the Personalization Blueprint module. If you choose to persist personal data, you may legally be obliged to disclose this fact to your end users and to seek and document permission which may require additional custom code.

Here is a list of context sources delivered with *CoreMedia Adaptive Personalization*. Find the details about their use in the respective API documentation.

Name	Description
<code>CookieSource</code>	This source stores a context object in a cookie. The parameters of the used cookie (such as its max age) can be configured via properties of the source. The source serializes the context into a string and then base-64 encodes this string before writing it to the cookie.
<code>SystemDateTimeSource</code>	This source adds a context object containing several properties related to the system's date and time. The added context implements the <code>PropertyProvider</code> interface.
<code>TableStoreSource</code>	This source stores and retrieves contexts to and from a <code>TableStore</code> implementation. A <code>TableStore</code> can be anything capable of persisting key-value pairs, such as a relational database or a persistent hash map. <code>TableStoreSource</code> also requires a <code>UserIdProvider</code> that is expected to return a unique id for the current user. This id is used to construct the key used to store the context object.
<code>SegmentSource</code>	This source provides a context that indicates the user segments the current user is a member of. See <a href="#">Section 3.3.4, "Working With Customer Segments" [48]</a> for details.
<code>TestContextSource</code>	This source reads test contexts from the CMS repository. See <a href="#">Section 3.3.2.4, "Working With Test Contexts" [39]</a> for details.

Table 5.2. Supplied context sources

# Glossary

Blob	Binary Large Object or short blob, a property type for binary objects, such as graphics.
CaaS	Content as a Service or short caas, a synonym for the CoreMedia Headless Server.
CAE Feeder	Content applications often require search functionality not only for single content items but for content beans. The <i>CAE Feeder</i> makes content beans searchable by sending their data to the <i>Search Engine</i> , which adds it to the index.
Content Application Engine (CAE)	<p>The <i>Content Application Engine (CAE)</i> is a framework for developing content applications with <i>CoreMedia CMS</i>.</p> <p>While it focuses on web applications, the core frameworks remain usable in other environments such as standalone clients, portal containers or web service implementations.</p> <p>The CAE uses the Spring Framework for application setup and web request processing.</p>
Content Bean	A content bean defines a business oriented access layer to the content, that is managed in <i>CoreMedia CMS</i> and third-party systems. Technically, a content bean is a Java object that encapsulates access to any content, either to <i>CoreMedia CMS</i> content items or to any other kind of third-party systems. Various <i>CoreMedia</i> components like the <i>CAE Feeder</i> or the data view cache are built on this layer. For these components the content beans act as a facade that hides the underlying technology.
Content Delivery Environment	<p>The <i>Content Delivery Environment</i> is the environment in which the content is delivered to the end-user.</p> <p>It may contain any of the following modules:</p> <ul style="list-style-type: none"> <li>• <i>CoreMedia Master Live Server</i></li> <li>• <i>CoreMedia Replication Live Server</i></li> <li>• <i>CoreMedia Content Application Engine</i></li> <li>• <i>CoreMedia Search Engine</i></li> <li>• <i>Elastic Social</i></li> <li>• <i>CoreMedia Adaptive Personalization</i></li> </ul>

## Glossary |

Content Feeder	The <i>Content Feeder</i> is a separate web application that feeds content items of the CoreMedia repository into the <i>CoreMedia Search Engine</i> . Editors can use the <i>Search Engine</i> to make a full text search for these fed items.
Content item	In <i>CoreMedia CMS</i> , content is stored as self-defined content items. Content items are specified by their properties or fields. Typical content properties are, for example, title, author, image and text content.
Content Management Environment	<p>The <i>Content Management Environment</i> is the environment for editors. The content is not visible to the end user. It may consist of the following modules:</p> <ul style="list-style-type: none"><li>• <i>CoreMedia Content Management Server</i></li><li>• <i>CoreMedia Workflow Server</i></li><li>• <i>CoreMedia Importer</i></li><li>• <i>CoreMedia Studio</i></li><li>• <i>CoreMedia Search Engine</i></li><li>• <i>CoreMedia Adaptive Personalization</i></li><li>• <i>CoreMedia Preview CAE</i></li></ul>
Content Management Server	Server on which the content is edited. Edited content is published to the Master Live Server.
Content Repository	<i>CoreMedia CMS</i> manages content in the Content Repository. Using the Content Server or the UAPI you can access this content. Physically, the content is stored in a relational database.
Content Server	<p><i>Content Server</i> is the umbrella term for all servers that directly access the CoreMedia repository:</p> <p><i>Content Servers</i> are web applications running in a servlet container.</p> <ul style="list-style-type: none"><li>• <i>Content Management Server</i></li><li>• <i>Master Live Server</i></li><li>• <i>Replication Live Server</i></li></ul>
Content type	A content type describes the properties of a certain type of content. Such properties are for example title, text content, author, ...
Contributions	Contributions are tools or extensions that can be used to improve the work with <i>CoreMedia CMS</i> . They are written by CoreMedia developers - be it clients, partners or CoreMedia employees. CoreMedia contributions are hosted on Github at <a href="https://github.com/coremedia-contributions">https://github.com/coremedia-contributions</a> .
Control Room	<i>Control Room</i> is a <i>Studio</i> plugin, which enables users to manage projects, work with workflows, and collaborate by sharing content with other <i>Studio</i> users.
CORBA [Common Object Request Broker Architecture]	The term <i>CORBA</i> refers to a language- and platform-independent distributed object standard which enables interoperation between heterogenous applications over a network. It was created and is currently controlled by the Object Management Group [OMG], a standards consortium for distributed object-oriented systems.

	<p>CORBA programs communicate using the standard IIOP protocol.</p>
CoreMedia Studio	<p><i>CoreMedia Studio</i> is the working environment for business specialists. Its functionality covers all the stages in a web-based editing process, from content creation and management to preview, test and publication.</p> <p>As a modern web application, <i>CoreMedia Studio</i> is based on the latest standards like Ajax and is therefore as easy to use as a normal desktop application.</p>
Dead Link	<p>A link, whose target does not exist.</p>
Derived Site	<p>A derived site is a site, which receives localizations from its master site. A derived site might itself take the role of a master site for other derived sites.</p>
DTD	<p>A Document Type Definition is a formal context-free grammar for describing the structure of XML entities.</p> <p>The particular DTD of a given Entity can be deduced by looking at the document prolog:</p> <pre>&lt;!DOCTYPE coremedia SYSTEM "http://www.coremedia.com/dtd/coremedia.dtd"</pre> <p>There're two ways to indicate the DTD: Either by Public or by System Identifier. The System Identifier is just that: a URL to the DTD. The Public Identifier is an SGML Legacy Concept.</p>
Elastic Social	<p><i>CoreMedia Elastic Social</i> is a component of <i>CoreMedia CMS</i> that lets users engage with your website. It supports features like comments, rating, likings on your website. <i>Elastic Social</i> is integrated into <i>CoreMedia Studio</i> so editors can moderate user generated content from their common workplace. <i>Elastic Social</i> bases on NoSQL technology and offers nearly unlimited scalability.</p>
EXML	<p>EXML is an XML dialect used in former CoreMedia Studio version for the declarative development of complex Ext JS components. EXML is Jangaroo 2's equivalent to Apache Flex (formerly Adobe Flex) MXML and compiles down to ActionScript. Starting with release 1701 / Jangaroo 4, standard MXML syntax is used instead of EXML.</p>
Folder	<p>A folder is a resource in the CoreMedia system which can contain other resources. Conceptually, a folder corresponds to a directory in a file system.</p>
FTL	<p>FTL (FreeMarker Template Language) is a Java-based template technology for generating dynamic HTML pages.</p>
Headless Server	<p>CoreMedia Headless Server is a CoreMedia component introduced with CoreMedia Content Cloud which allows access to CoreMedia content as JSON through a GraphQL endpoint.</p> <p>The generic API allows customers to use CoreMedia CMS for headless use cases, for example delivery of pure content to Native Mobile Applications, Smart-</p>



	watches/Wearable Devices, Out-of-Home or In-Store Displays or Internet-of-Things use cases.
Home Page	The main entry point for all visitors of a site. Technically it is often referred to as root document and also serves as provider of the default layout for all subpages.
IETF BCP 47	Document series of <i>Best current practice</i> (BCP) defined by the Internet Engineering Task Force (IETF). It includes the definition of IETF language tags, which are an abbreviated language code such as en for English, pt-BR for Brazilian Portuguese, or nan-Hant-TW for Min Nan Chinese as spoken in Taiwan using traditional Han characters.
Importer	Component of the CoreMedia system for importing external content of varying format.
IOR (Interoperable Object Reference)	A CORBA term, <i>Interoperable Object Reference</i> refers to the name with which a CORBA object can be referenced.
Jangaroo	<i>Jangaroo</i> is a JavaScript framework developed by CoreMedia that supports TypeScript (formerly MXML/ActionScript) as an input language which is compiled down to JavaScript compatible with Ext JS. You will find detailed descriptions on the Jangaroo webpage <a href="http://www.jangaroo.net">http://www.jangaroo.net</a> . Jangaroo 4 is the ActionScript/MXML/Maven based version for CMCC 10. Since CMCC 11 [2110], Jangaroo uses TypeScript and is implemented as a <i>Node.js</i> and <i>npm</i> based set of tools.
Java Management Extensions (JMX)	The Java Management Extensions is an API for managing and monitoring applications and services in a Java environment. It is a standard, developed through the Java Community Process as JSR-3. Parts of the specification are already integrated with Java 5. JMX provides a tiered architecture with the instrumentation level, the agent level and the manager level. On the instrumentation level, MBeans are used as managed resources.
Locale	Locale is a combination of country and language. Thus, it refers to translation as well as to localization. Locales used in translation processes are typically represented as IETF BCP 47 language tags.
Master Live Server	The <i>Master Live Server</i> is the heart of the <i>Content Delivery Environment</i> . It receives the published content from the <i>Content Management Server</i> and makes it available to the <i>CAE</i> . If you are using the <i>CoreMedia Multi-Master Management Extension</i> you may use multiple <i>Master Live Server</i> in a CoreMedia system.
Master Site	A master site is a site other localized sites are derived from. A localized site might itself take the role of a master site for other derived sites.
MIME	With Multipurpose Internet Mail Extensions (MIME), the format of multi-part, multi-media emails and of web documents is standardised.
MXML	MXML is an XML dialect used by Apache Flex (formerly Adobe Flex) for the declarative specification of UI components and other objects. Up to CMCC 10 [2107], CoreMedia Studio used the Open Source compiler Jangaroo 4 to translate MXML and ActionScript sources to JavaScript that is compatible with Ext JS 7. Starting

	<p>with CMCC 11 [2110], a new, Node.js and npm based version of Jangaroo is used that supports standard TypeScript syntax instead of MXML/ActionScript, still compiling to Ext JS 7 JavaScript.</p>
Personalisation	<p>On personalised websites, individual users have the possibility of making settings and adjustments which are saved for later visits.</p>
Projects	<p>With projects you can group content and manage and edit it collaboratively, setting due dates and defining to-dos. Projects are created in the Control Room and managed in project tabs.</p>
Property	<p>In relation to CoreMedia, properties have two different meanings:</p> <p>In CoreMedia, content items are described with properties (content fields). There are various types of properties, e.g. strings (such as for the author), Blobs (e.g. for images) and XML for the textual content. Which properties exist for a content item depends on the content type.</p> <p>In connection with the configuration of CoreMedia components, the system behavior of a component is determined by properties.</p>
Replication Live Server	<p>The aim of the <i>Replication Live Server</i> is to distribute load on different servers and to improve the robustness of the <i>Content Delivery Environment</i>. The <i>Replication Live Server</i> is a complete Content Server installation. Its content is an replicated image of the content of a <i>Master Live Server</i>. The <i>Replication Live Server</i> updates its database due to change events from the <i>Master Live Server</i>. You can connect an arbitrary number of <i>Replication Live Servers</i> to the <i>Master Live Server</i>.</p>
Resource	<p>A folder or a content item in the CoreMedia system.</p>
ResourceURI	<p>A ResourceUri uniquely identifies a page which has been or will be created by the <i>Active Delivery Server</i>. The ResourceUri consists of five components: Resource ID, Template ID, Version number, Property names and a number of key/value pairs as additional parameters.</p>
Responsive Design	<p>Responsive design is an approach to design a website that provides an optimal viewing experience on different devices, such as PC, tablet, mobile phone.</p>
Site	<p>A site is a cohesive collection of web pages in a single locale, sometimes referred to as localized site. In <i>CoreMedia CMS</i> a site especially consists of a site folder, a site indicator and a home page for a site.</p> <p>A typical site also has a master site it is derived from.</p>
Site Folder	<p>All contents of a site are bundled in one dedicated folder. The most prominent document in a site folder is the site indicator, which describes details of a site.</p>
Site Indicator	<p>A site indicator is the central configuration object for a site. It is an instance of a special content type, most likely <code>CMSSite</code>.</p>

## Glossary |

Site Manager Group	Members of a site manager group are typically responsible for one localized site. Responsible means that they take care of the contents of that site and that they accept translation tasks for that site.
Template	<p>In CoreMedia, FreeMarker templates used for displaying content are known as Templates.</p> <p>OR</p> <p>In <i>Blueprint</i> a template is a predeveloped content structure for pages. Defined by typically an administrative user a content editor can use this template to quickly create a complete new page including, for example, navigation, predefined layout and even predefined content.</p>
Translation Manager Role	Editors in the translation manager role are in charge of triggering translation workflows for sites.
User Changes web application	The <i>User Changes</i> web application is a <i>Content Repository</i> listener, which collects all content, modified by <i>Studio</i> users. This content can then be managed in the <i>Control Room</i> , as a part of projects and workflows.
Variants	Most of the time used in context of content variants, variants refer to all localized versions within the complete hierarchy of master and their derived sites (including the root master itself).
Version history	A newly created content item receives the version number 1. New versions are created when the content item is checked in; these are numbered in chronological order.
Weak Links	<p>In general <i>CoreMedia CMS</i> always guarantees link consistency. But links can be declared with the <i>weak</i> attribute, so that they are not checked during publication or withdrawal.</p> <p>Caution! Weak links may cause dead links in the live environment.</p>
Workflow	A workflow is the defined series of tasks within an organization to produce a final outcome. Sophisticated applications allow you to define different workflows for different types of jobs. So, for example, in a publishing setting, a document might be automatically routed from writer to editor to proofreader to production. At each stage in the workflow, one individual or group is responsible for a specific task. Once the task is complete, the workflow software ensures that the individuals responsible for the next task are notified and receive the data they need to execute their stage of the process.
Workflow Server	The <i>CoreMedia Workflow Server</i> is part of the Content Management Environment. It comes with predefined workflows for publication and global-search-and-replace but also executes freely definable workflows.
XLIFF	XLIFF is an XML-based format, standardized by OASIS for the exchange of localizable data. An XLIFF file contains not only the text to be translated but also metadata about the text. For example, the source and target language. <i>CoreMedia Studio</i>

allows you to export content items in the XLIFF format and to import the files again after translation.

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