

Afterhours Personalization Training

Overview

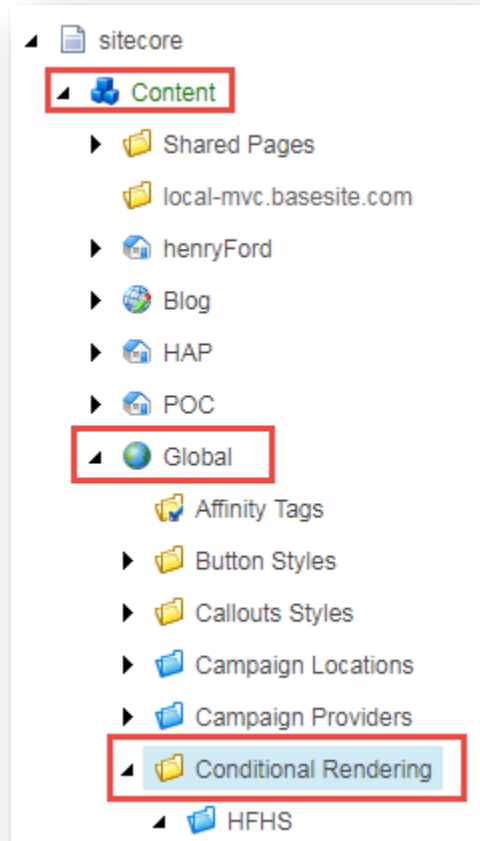
MedTouch created 2 unique custom date and time rules, which enables the HFHS organization to “personalize” components on their pages for campaigns like afterhours care options for patients. Leveraging these rules will allow HFHS to promote walk-in clinics and urgent cares outside of non-business hours, weekends, and holidays to visitors on the website.

Creating Designated Days

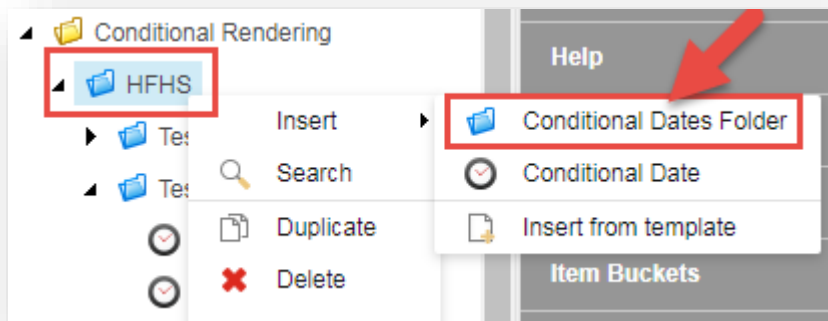
Before beginning, determine the specific calendar days and the timeframes on those days that you would like to set up rules for.

Note – Not ALL days/times for an entire year need to be finalized at once. You can ADD to this at any point throughout the year

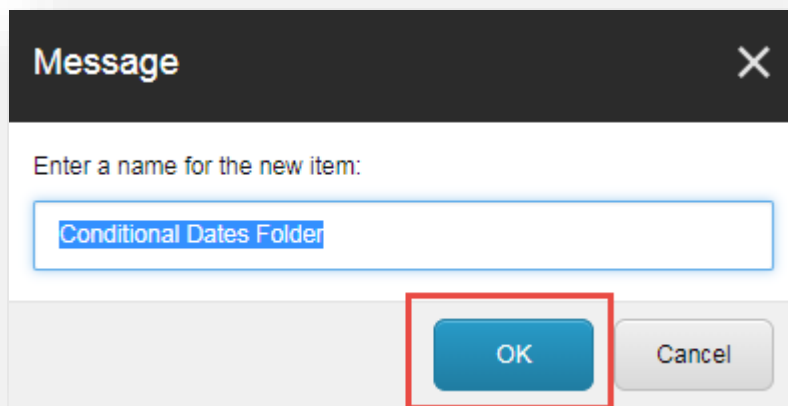
With dates and time in hand, navigate to the Global section of the site and location the **Condition Rendering** folder (sitecore/Content/Global/Conditional Rendering).



Dates will be created in subfolders under HFHS. To begin, right-click on the HFHS item and insert a **Conditional Dates Folder**.

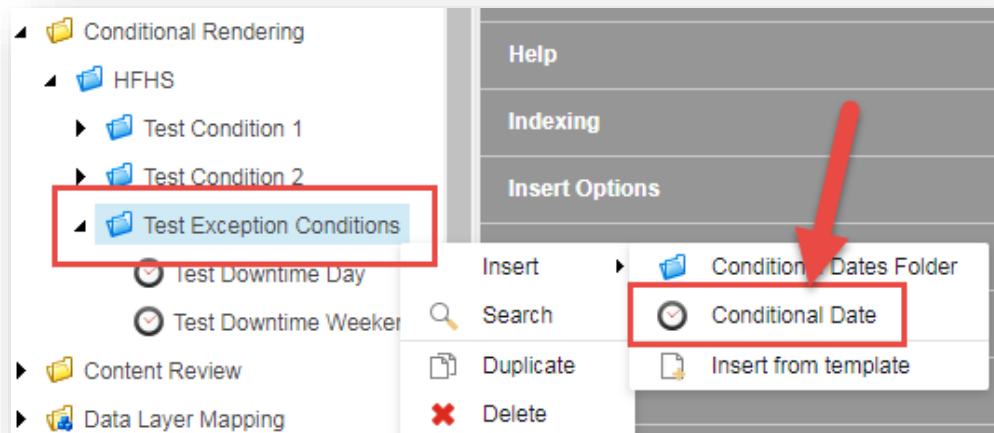


Use a name that is recognizable and unique enough when you need to associate it to a component later on.

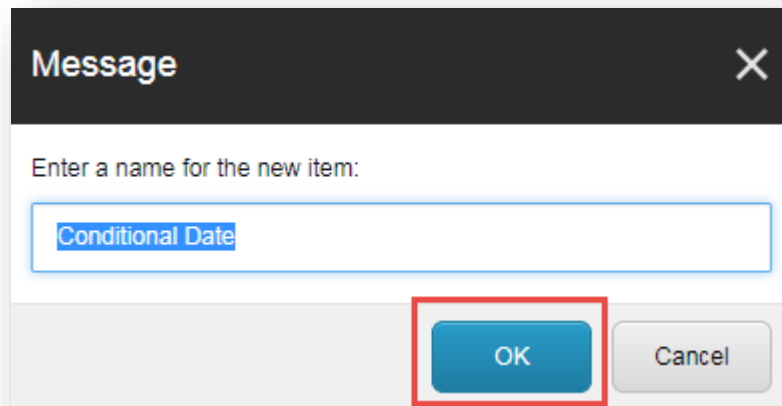


You can begin to create individual dates by right-clicking on your newly created folder to insert a **Conditional Date**.

Note – You can have as many date(s) as you would like in a folder (e.g. 1 date, 20 dates, etc)



Use a unique, recognizable name for the date name.



A **Conditional Date** is comprised of the following

1. **Description (in red)** – Where an optional description can be added in the single-line text field
 - a. By default will pull in the item name but can be changed to anything
2. **Start (in blue)** – Where the Start Date and Time will be indicated using the date and time pickers
 - a. By default will be empty
 - b. Time can be inputted in Eastern Standard Time (no need to convert)
 - c. The start day and time must be BEFORE the end date and time
3. **End (in green)** – Where the End Date and Time will be indicated using the date and time pickers
 - a. By default will be empty
 - b. Time can be inputted in Eastern Standard Time (no need to convert)
 - c. The End date and time must be AFTER the start end and time
 - i. The End date and time can be on the same day
 - ii. The End date and time can span multiple days as needed (see **Sample screenshot**)

The screenshot displays a web form titled "Test Downtime Day 2" with a clock icon. Below the title is a "Quick Info" section. The main section is "Conditional Date Properties". It contains three input fields: "Description:", "Start:", and "End:". The "Description:" field is highlighted with a red border and contains the text "Test Downtime Day 2". The "Start:" field is highlighted with a blue border and contains "Now" and "Clear" buttons, followed by two empty date/time pickers. The "End:" field is highlighted with a green border and contains "Now" and "Clear" buttons, followed by two empty date/time pickers.

Sample:

 **Test Downtime Day 2**

Quick Info

Conditional Date Properties

Description:

Test Downtime Day 2 description field which can be changed

Start:

[Now](#) | [Clear](#)

3/1/2018

▼

8:00 PM

▼

End:

[Now](#) | [Clear](#)

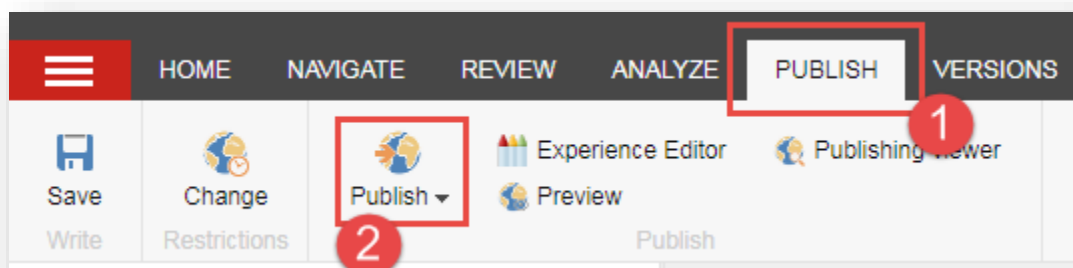
3/2/2018

▼

8:00 AM

▼

Once all the date(s) under the folder have been created, publish your newly created items.



Updating Component

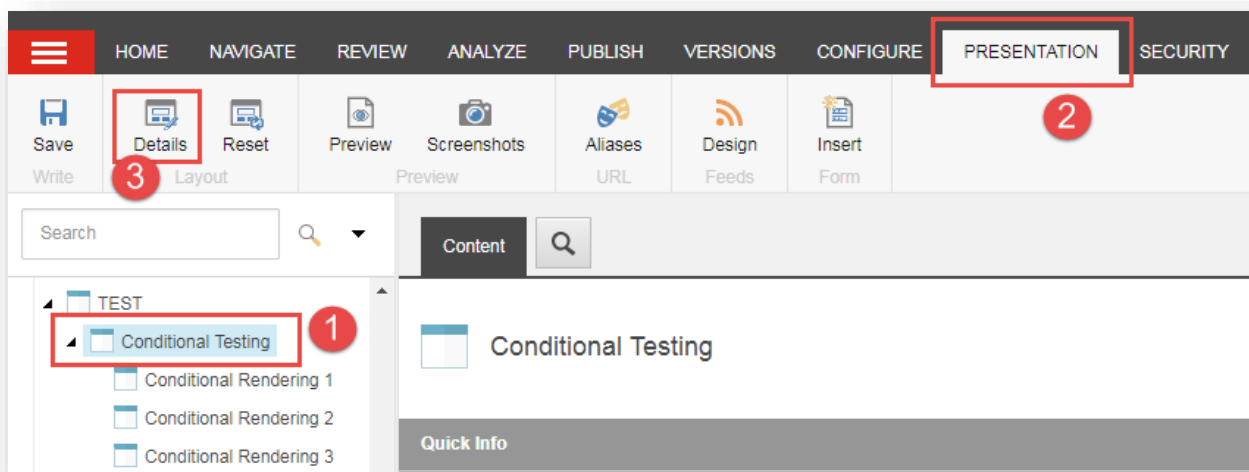
Before beginning:

1. Determine the components you would like to leverage these rules with
 - a. In this example, we will be targeting the Hero Banner control used on the Homepage and HF Landing pages
2. Create the alternative content for your components
 - a. In this example, we will be showing pre-created hero banner content

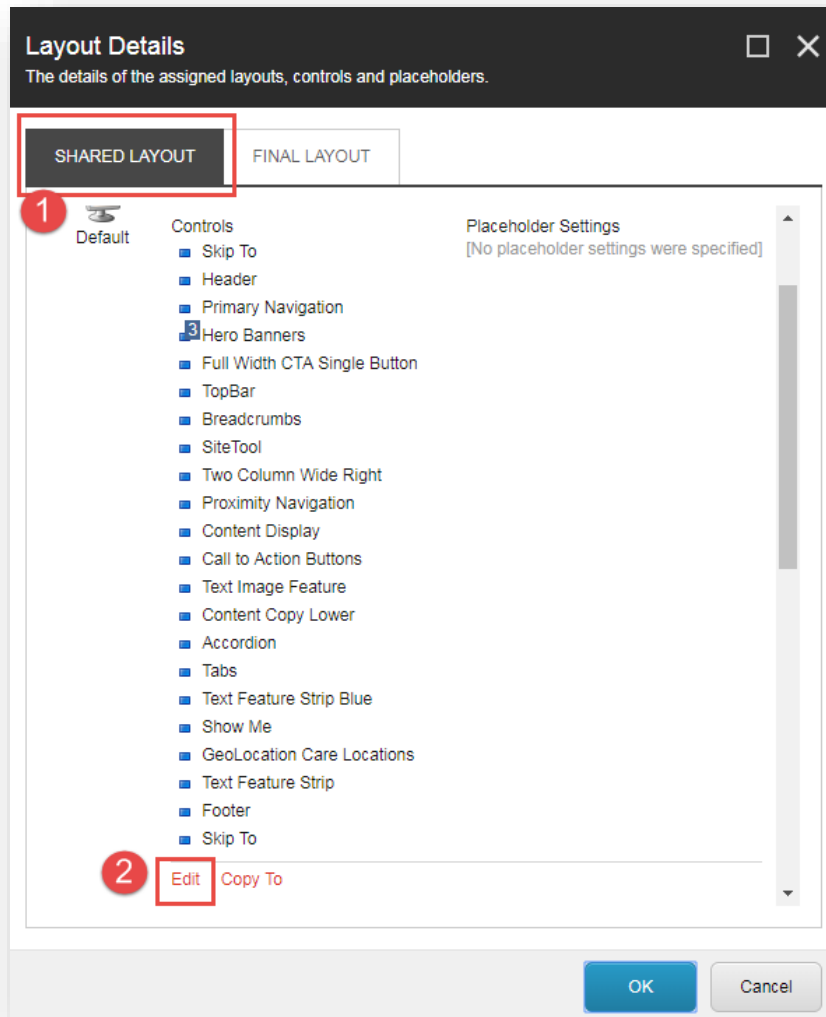
Note – Not all components on the page are ‘personalizable’. If you have any questions about which ones are and which ones are not, reference personalization training documents or reach out to MedTouch to help answer your questions!

To begin:

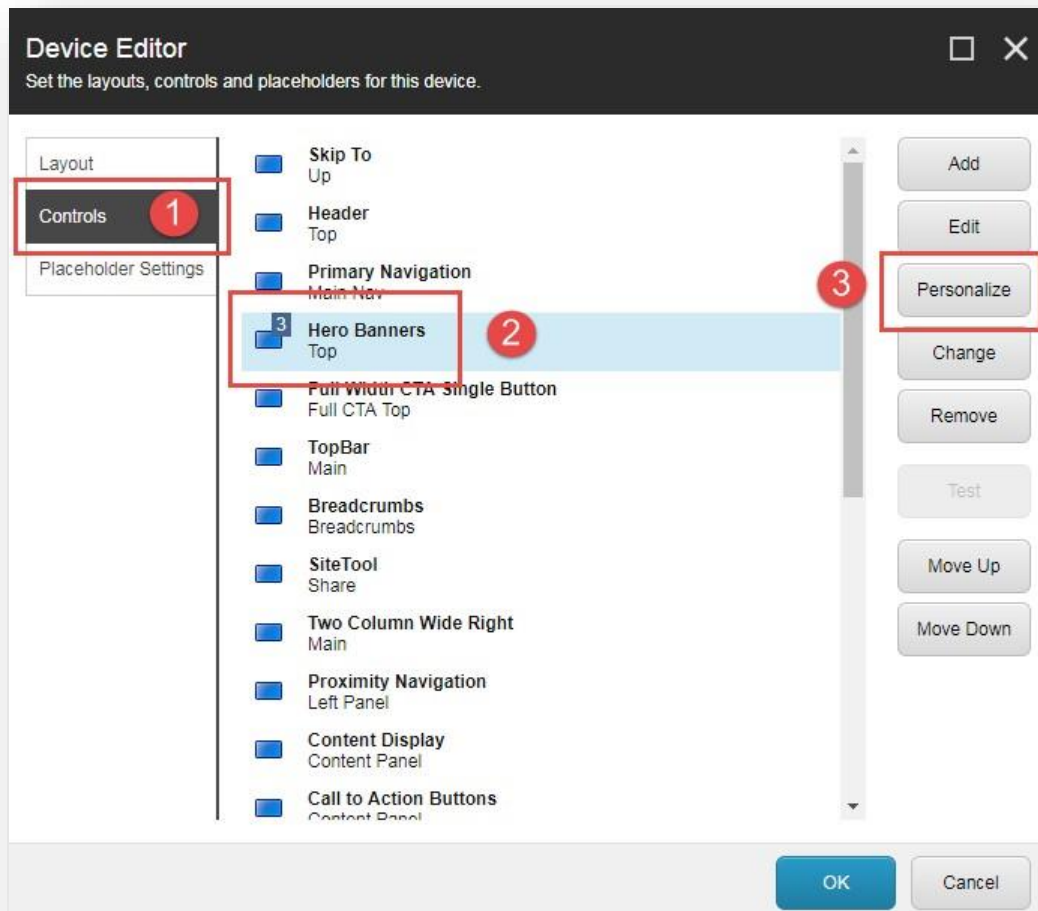
1. Navigate to the desired page
2. Under **Presentation**
3. Click on the **Details** icon



Under **Shared Layouts**, click the **Edit** link at the end of the list of components.

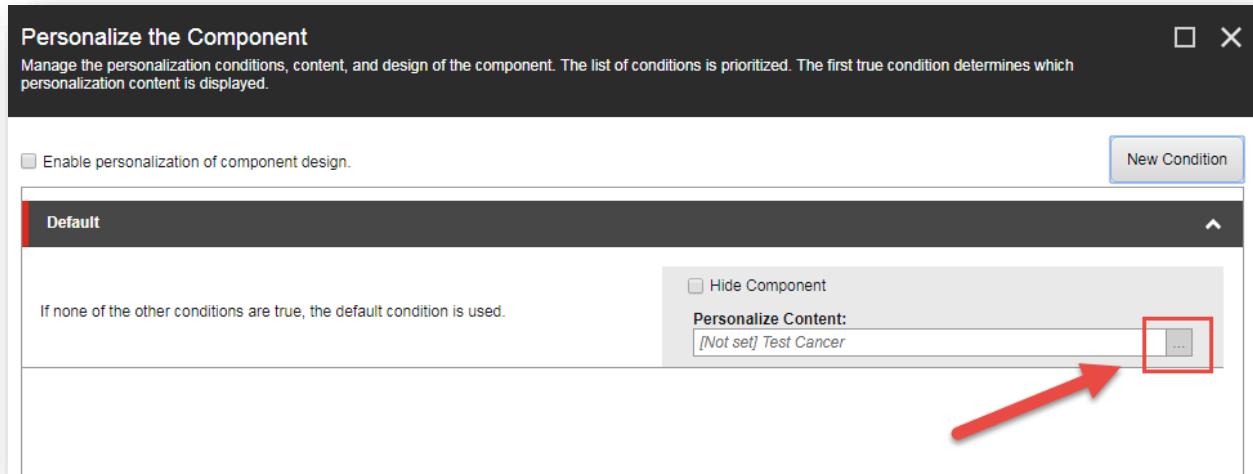


Under **Controls**, highlight the component you would like to personalization (**Hero Banners** are used in this example). Click the **Personalize** button in the right hand side of the dialog.

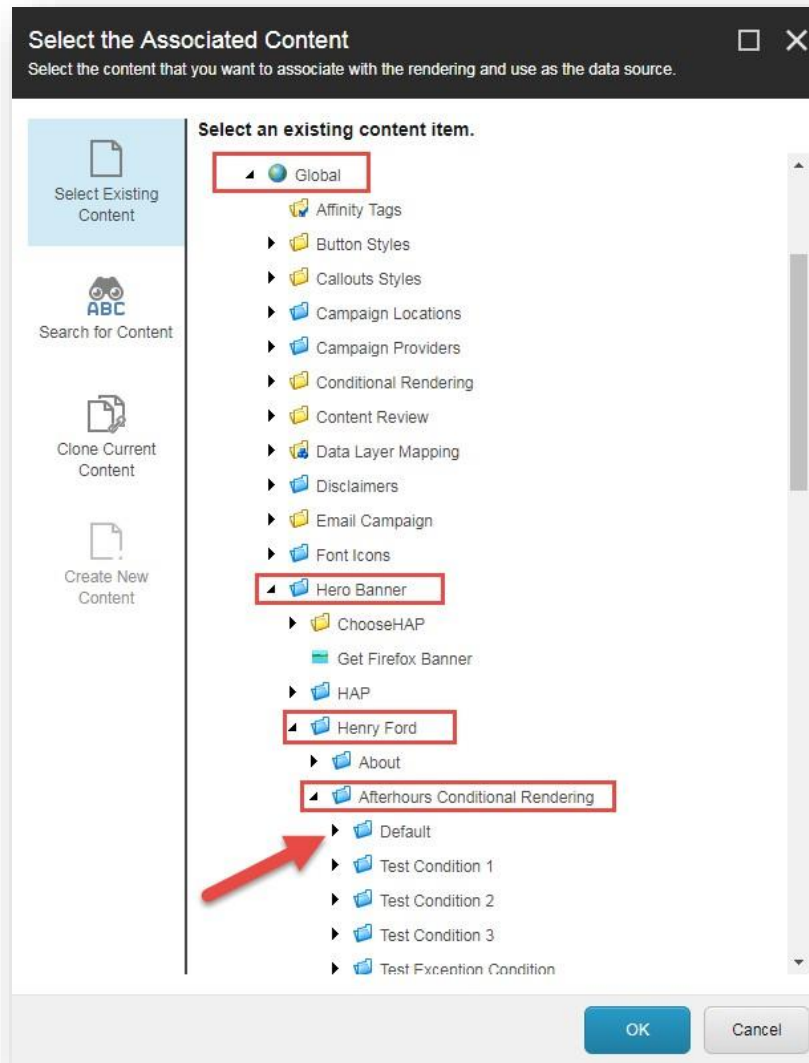


This will open the personalized component dialog where you will indicate your content and create the conditions that will be checked when determining what version of content to render.

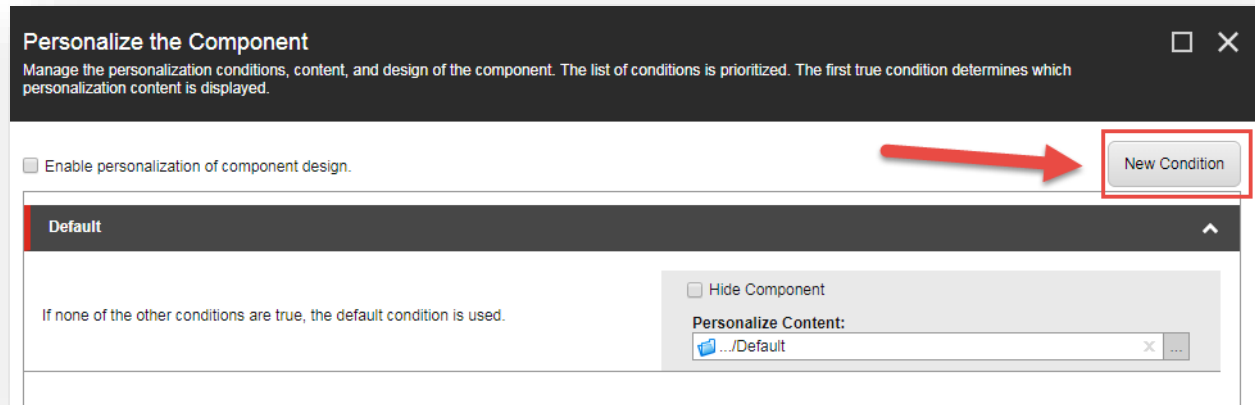
Set the **Default** content first. This content will render if all other conditions/rules indicated are not met. To begin, click on the box shown in the screenshot.



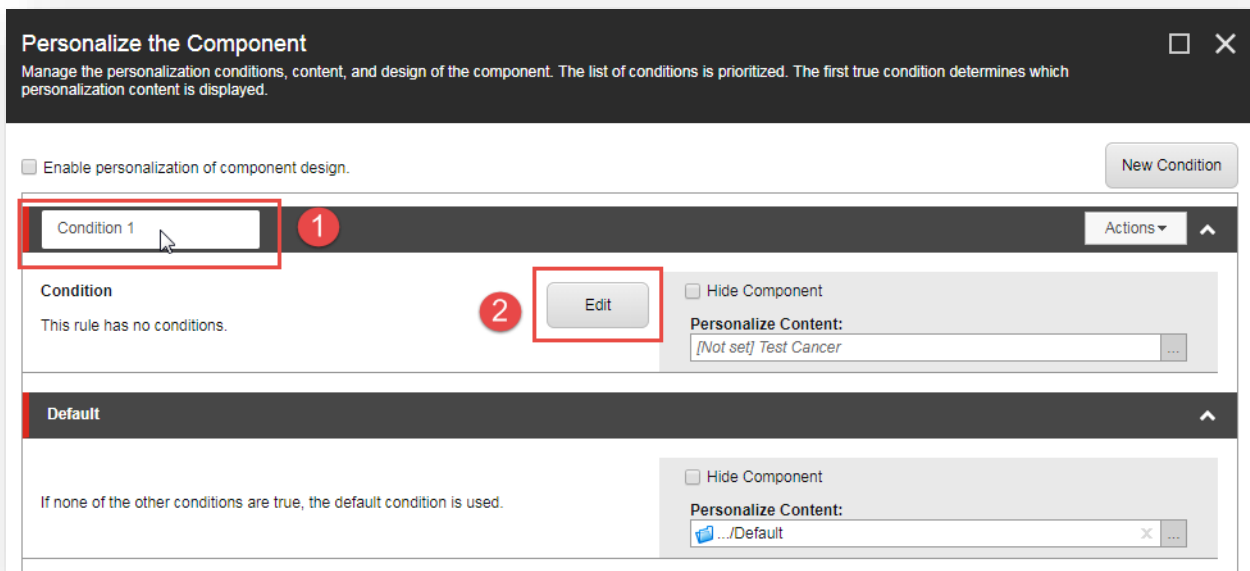
This will open a dialog. Navigate to your designated content. In this example, we will be selecting the from the global hero banners section. Since this is the hero banners control, where multiple hero banners can render, we have to select the folder.



With the default content indicated, create your first condition by clicking the **New Condition** button in the upper right corner.



Name your condition uniquely. Once named, click on the **Edit** button to begin to add rules for this condition.



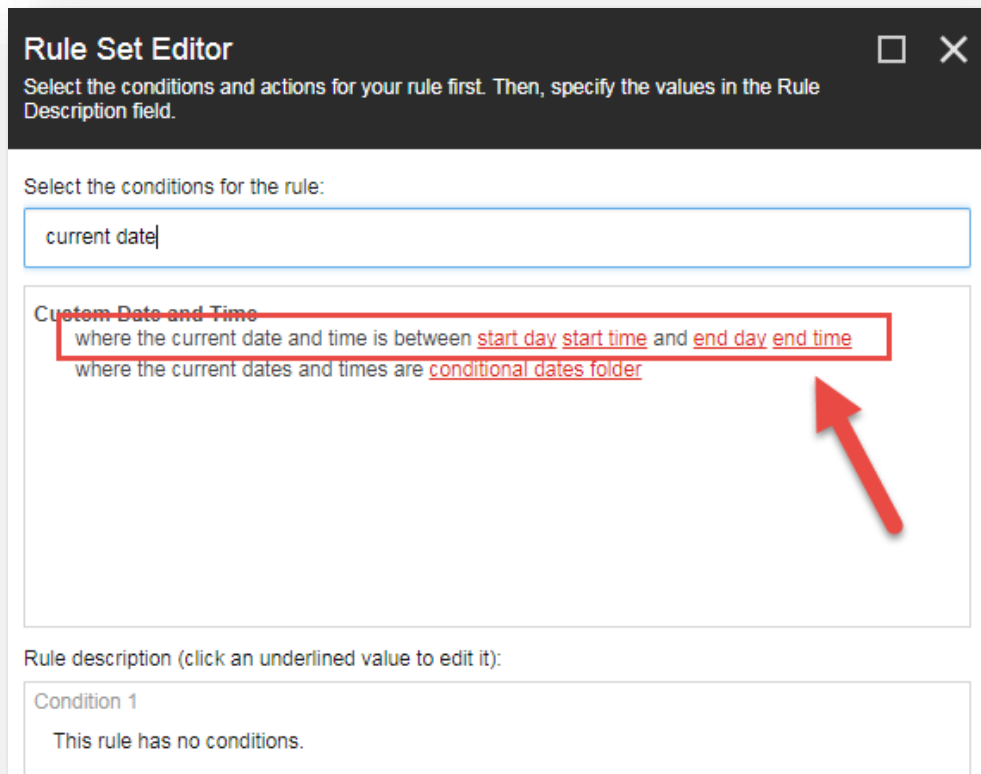
In the Rules Set Editor dialog that opens, find the **Custom Date and Time** type rules.

Rule 1: Where the current date and time is between start day start time and end day end time

- This rule will check if the current date and time is between the start and enddate/times indicated
- You will be able to indicate general days of the week
- Both days and times are required in this rule
 - NOTE: Times entered are based on the SC server time, not local machine time.
- Use **Rule 2** instead if you need to indicate exact calendar date(s)

Rule 2: Where the current dates and times are conditional dates folder

- This rule will be used in conjunction with the specific dates created in global
- You will point to the appropriate conditional dates folder
- This rule will compare the current date and time with the exact dates/times in the folder



Click on the Rule 1 to add to the listing. To being to build Rule 1 out, click on the **Start Day**.

Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

current date

Custom Date and Time

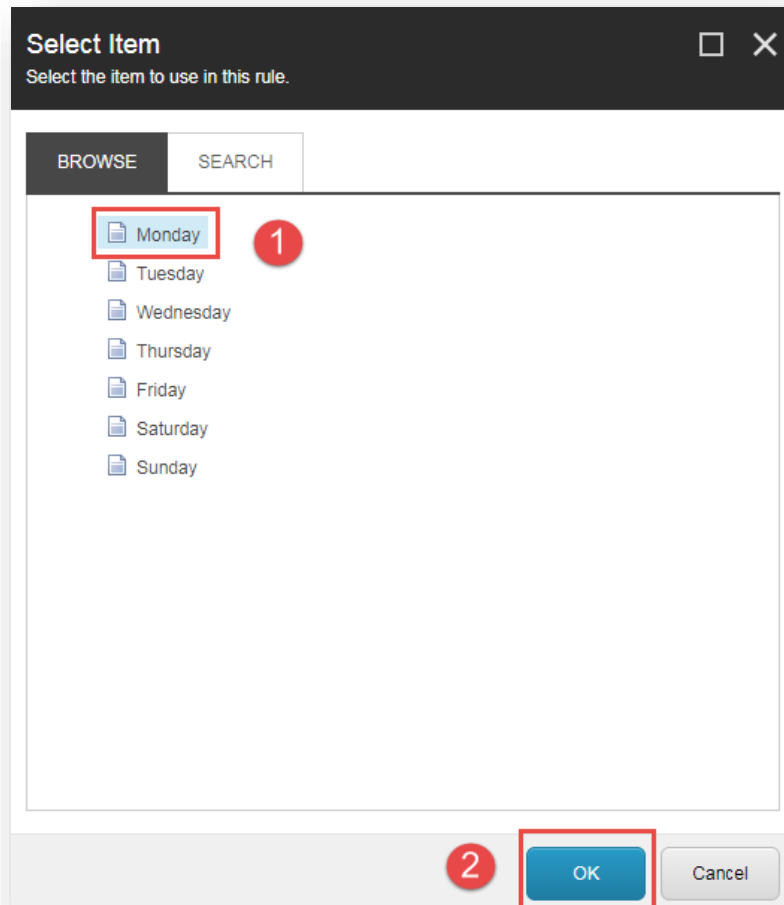
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between start day start time and end day end time

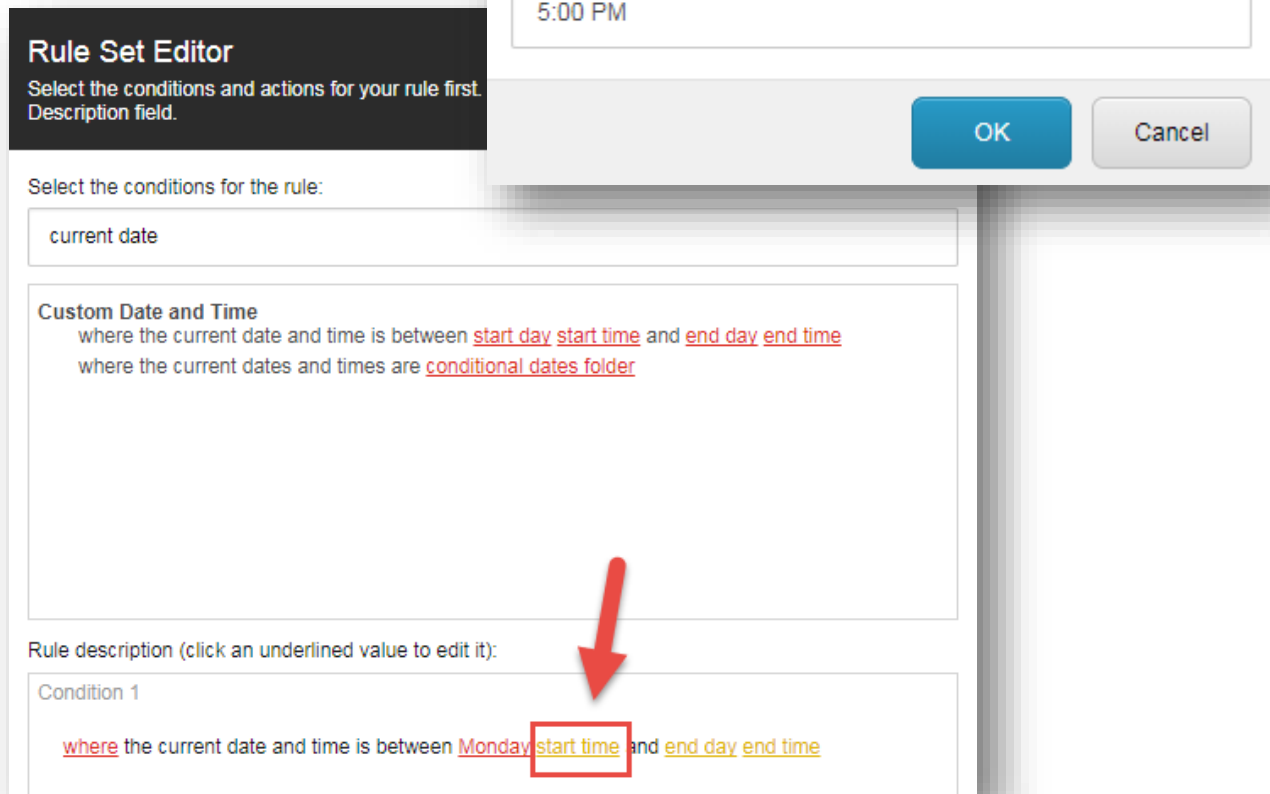
The dialog of days of the week will open. Select the appropriate day.



Clicking **Start Time** will open the dialog where you can enter the start time on the designated day. While the time entry is flexible, we recommend using the following standard time format:

HH:MM AM/PM. Examples:

- 11:00 PM
- 12:00 AM



Rule Set Editor
Select the conditions and actions for your rule first.
Description field.

Select the conditions for the rule:

current date

Custom Date and Time
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

Rule description (click an underlined value to edit it):

Condition 1
where the current date and time is between Monday start time and end day end time

Message [X]

Enter value

5:00 PM

OK Cancel

Note – If incorrect characters are mistakenly used (e.g. entering a semicolon rather than a colon), the control will not render on the page.

Using the same steps, indicate the **End Day** and the **End Time**.

The screenshot shows the 'Rule Set Editor' window. At the top, it says 'Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.' Below this, there's a section 'Select the conditions for the rule:' with a text input field containing 'current date|'. Underneath is a 'Custom Date and Time' section with instructions: 'where the current date and time is between start day start time and end day end time where the current dates and times are conditional dates folder'. The 'Rule description (click an underlined value to edit it):' section shows 'Condition 1' with the text: 'where the current date and time is between Monday 5:00 PM and end day end time'. A red arrow points to the 'end day end time' text, which is highlighted with a red box.

Rule Set Editor □ ×

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

current date|

Custom Date and Time
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and end day end time

Continue adding the additional days of the week as needed.

Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

current date

Custom Date and Time

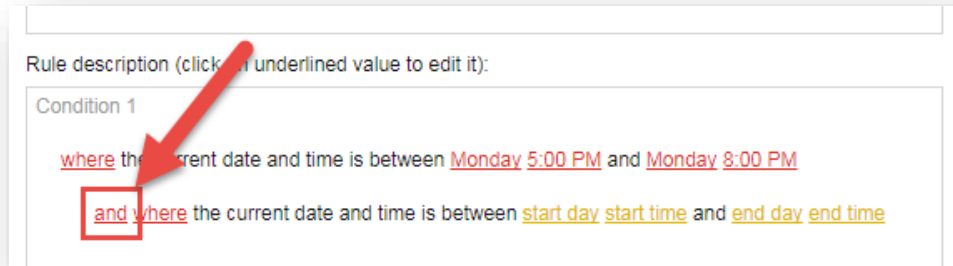
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

To ensure that any of the rules would trigger the condition, click on the **AND** for the newly added rule to change the logic operator to an **OR**.



Rule description (click an underlined value to edit it):

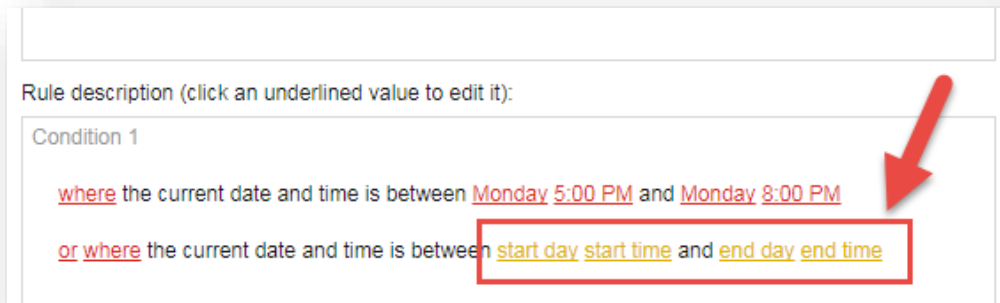
Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

and where the current date and time is between start day start time and end day end time

A red arrow points to the word "and" in the second condition, which is highlighted with a red box.

Indicate the start/end days and times for the newly added rule.



Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

or where the current date and time is between start day start time and end day end time

A red arrow points to the word "or" in the second condition, which is highlighted with a red box.

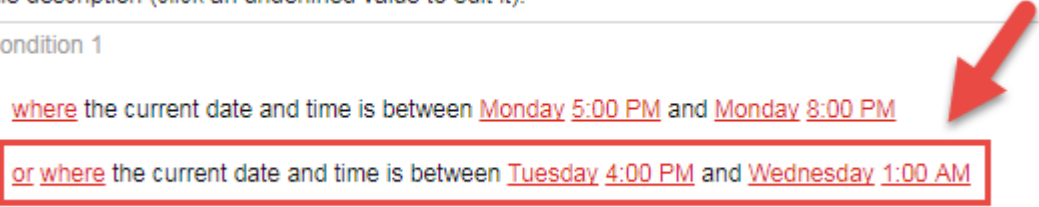
The end date does not need to be on the same day. In this example we have extended the time frame into the next day. As long as the current date and time falls within the timeframe, the rule will trigger and render the indicated content.

Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

or where the current date and time is between Tuesday 4:00 PM and Wednesday 1:00 AM



Rule 2 can also be leveraged within the same condition or in a separate condition if content will differ. Click on the rule to add to the list of condition(s).

Rule Set Editor

×

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

current date

Custom Date and Time

where the current date and time is between start day start time and end day end time

where the current dates and times are conditional dates folder

Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

or where the current date and time is between Tuesday 4:00 PM and Wednesday 1:00 AM

Click on the **Condition Dates Folder**.

Rule description (click an underlined value to edit it):

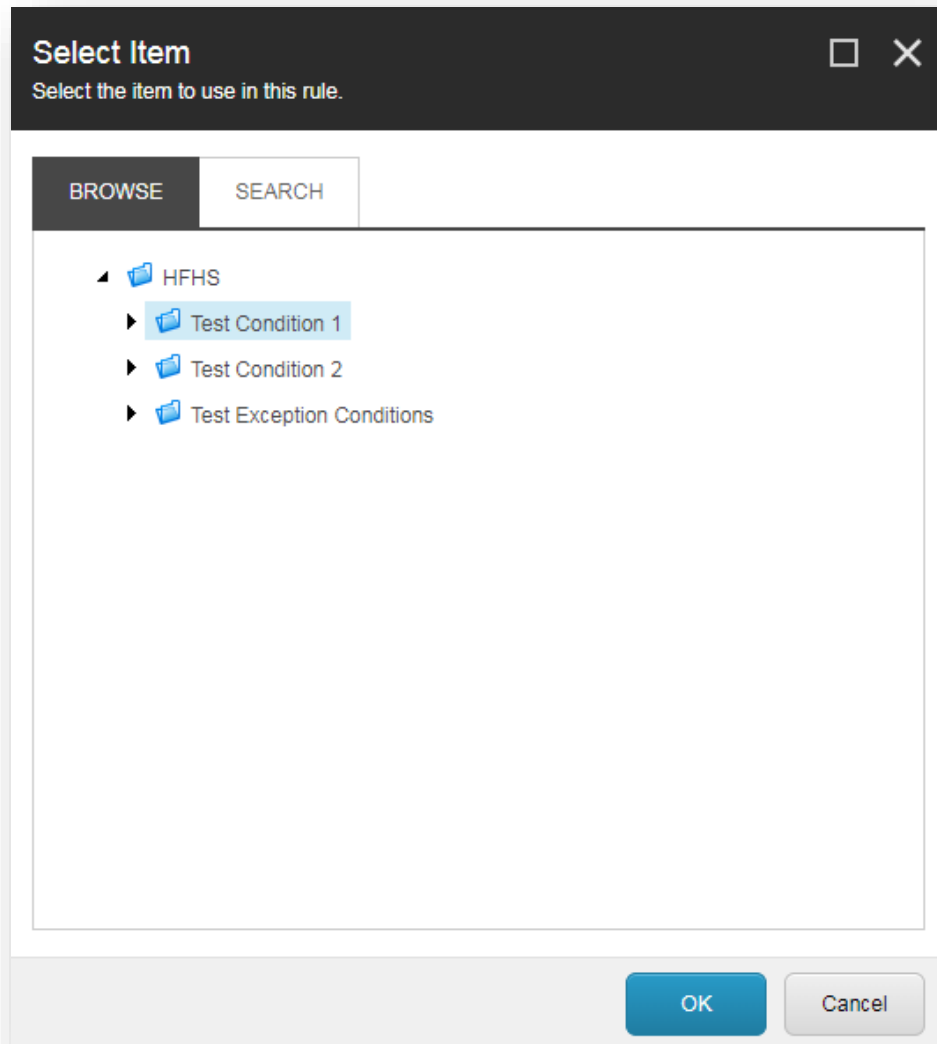
Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM

or where the current date and time is between Tuesday 4:00 PM and Wednesday 1:00 AM

or where the current dates and times are conditional dates folder

Select the conditional dates folder created in global.



Once all rules have been added, click **OK** to save changes.

Rule Set Editor [Close]

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

current date

Custom Date and Time
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

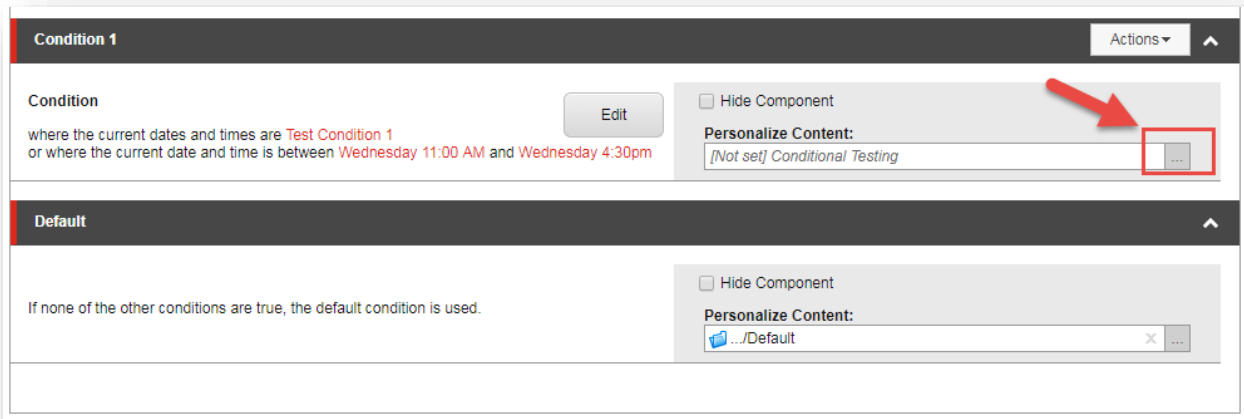
Rule description (click an underlined value to edit it):

Condition 1

where the current date and time is between Monday 5:00 PM and Monday 8:00 PM
or where the current date and time is between Tuesday 4:00 PM and Wednesday 1:00 AM
or where the current dates and times are Test Condition 1

OK Cancel

After indicating the rules, indicate the content that should render if this condition is TRUE.



Condition 1 Actions ▾ ^

Condition Edit

where the current dates and times are **Test Condition 1**
or where the current date and time is between **Wednesday 11:00 AM** and **Wednesday 4:30pm**

☐ Hide Component

Personalize Content:
[Not set] Conditional Testing

Default ^

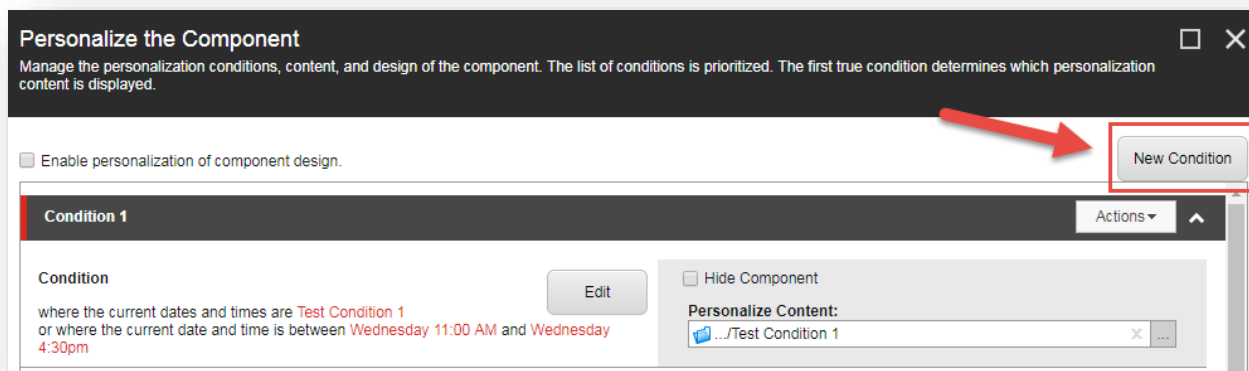
If none of the other conditions are true, the default condition is used.

☐ Hide Component

Personalize Content:
.../Default

Continue adding conditions according to content options as needed.

Note – Any number of conditions can be added if content needs dictate.



Personalize the Component □ ×

Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design.

New Condition

Condition 1 Actions ▾ ^

Condition Edit

where the current dates and times are **Test Condition 1**
or where the current date and time is between **Wednesday 11:00 AM** and **Wednesday 4:30pm**

☐ Hide Component

Personalize Content:
.../Test Condition 1

Once all condition(s) are in place, you can reorder the conditions. The conditions will be checked according to the order listed here.

Personalize the Component

Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design.

New Condition

Condition 2

Condition

Edit

☐ Hide Component

Personalize Content:

.../Test Condition 2

Actions

Delete

Rename

Move up

Move down

Condition

where the current dates and times are **Test Condition 1**
 or where the current date and time is between **Monday 12:00 PM** and **Monday 1:00 PM**
 or where the current date and time is between **Monday 4:00 PM** and **Monday 9:00 PM**
 or where the current date and time is between **Tuesday 5:00 PM** and **Wednesday 1:00 AM**
 or where the current date and time is between **Thursday 5:00 PM** and **Thursday 9:00 PM**
 or where the current date and time is between **Friday 5:00 PM** and **Saturday 12:59 AM**
 or where the current date and time is between **Saturday 8:00 AM** and **Saturday 8:00 PM**
 or where the current date and time is between **Sunday 11:00 AM** and **Sunday 4:00 PM**

Condition 1

Condition

Edit

☐ Hide Component

Personalize Content:

.../Test Condition 1

Actions

Condition

where the current dates and times are **Test Condition 1**
 or where the current date and time is between **Wednesday 11:00 AM** and **Wednesday 4:30pm**

Default

Condition

If none of the other conditions are true, the default condition is used.

☐ Hide Component

Personalize Content:

.../Default

OK

Cancel

Once all conditions and the proper order has been finalized, click **OK** to confirm and save.

Personalize the Component

Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design.

New Condition

Condition 1

Condition

where the current dates and times are **Test Condition 1**

or where the current date and time is between **Wednesday 11:00 AM** and **Wednesday 4:30 PM**

Edit

☐ Hide Component

Personalize Content:

.../Test Condition 1

✕

...

Condition 2

Condition

where the current dates and times are **Test Condition 1**

or where the current date and time is between **Monday 12:00 PM** and **Monday 1:00 PM**

or where the current date and time is between **Monday 4:00 PM** and **Monday 9:00 PM**

or where the current date and time is between **Tuesday 5:00 PM** and **Wednesday 1:00 AM**

or where the current date and time is between **Thursday 5:00 PM** and **Thursday 9:00 PM**

or where the current date and time is between **Friday 5:00 PM** and **Saturday 12:59 AM**

or where the current date and time is between **Saturday 8:00 AM** and **Saturday 8:00 PM**

or where the current date and time is between **Sunday 11:00 AM** and **Sunday 4:00 PM**

Edit

☐ Hide Component

Personalize Content:

.../Test Condition 2

✕

...

Default

If none of the other conditions are true, the default condition is used.

☐ Hide Component

Personalize Content:

.../Default

✕

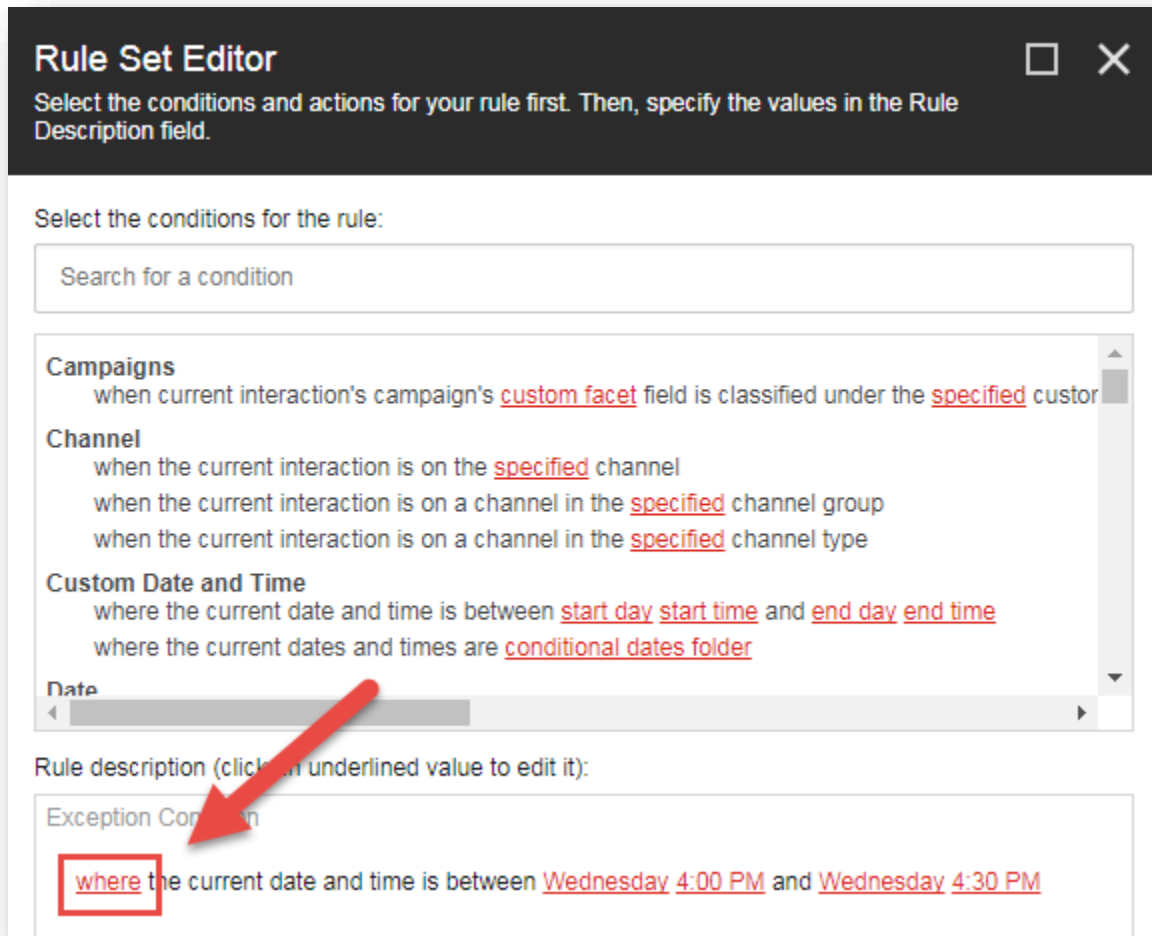
...

OK

Cancel

25

Exceptions – These rules can also be altered to indicate an **exception**. Click on **where** to change to an **except where** rule.



Rule Set Editor

Select the conditions and actions for your rule first. Then, specify the values in the Rule Description field.

Select the conditions for the rule:

Search for a condition

Campaigns
when current interaction's campaign's custom facet field is classified under the specified custom

Channel
when the current interaction is on the specified channel
when the current interaction is on a channel in the specified channel group
when the current interaction is on a channel in the specified channel type

Custom Date and Time
where the current date and time is between start day start time and end day end time
where the current dates and times are conditional dates folder

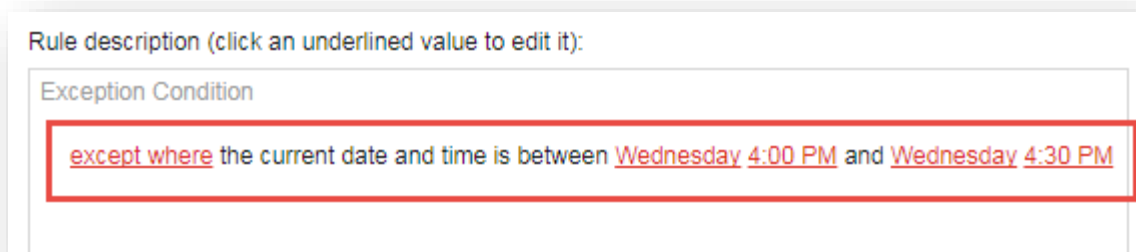
Date

Rule description (click an underlined value to edit it):

Exception Condition

where the current date and time is between Wednesday 4:00 PM and Wednesday 4:30 PM

In the example noted below, if the current date and time is NOT within the timeframe, the rule will be considered TRUE.



Rule description (click an underlined value to edit it):

Exception Condition

except where the current date and time is between Wednesday 4:00 PM and Wednesday 4:30 PM

Leveraging Additional Rules – These 2 rules can be coupled with OTHER rules and other actively running campaigns.

In the example noted below, the GeoIP Address match will first be checked if true.

Personalize the Component

Manage the personalization conditions, content, and design of the component. The list of conditions is prioritized. The first true condition determines which personalization content is displayed.

☐ Enable personalization of component design.

New Condition

IP Address Match

Condition

where the User IP address is equal to 96.237.102.130

Edit

☐ Hide Component

Personalize Content:

.../Test 1

Exception Condition

Condition

except where the current date and time is between Wednesday 4:00 PM and Wednesday 4:30 PM

Edit

☐ Hide Component

Personalize Content:

.../Test Exception Condition

Default

Condition

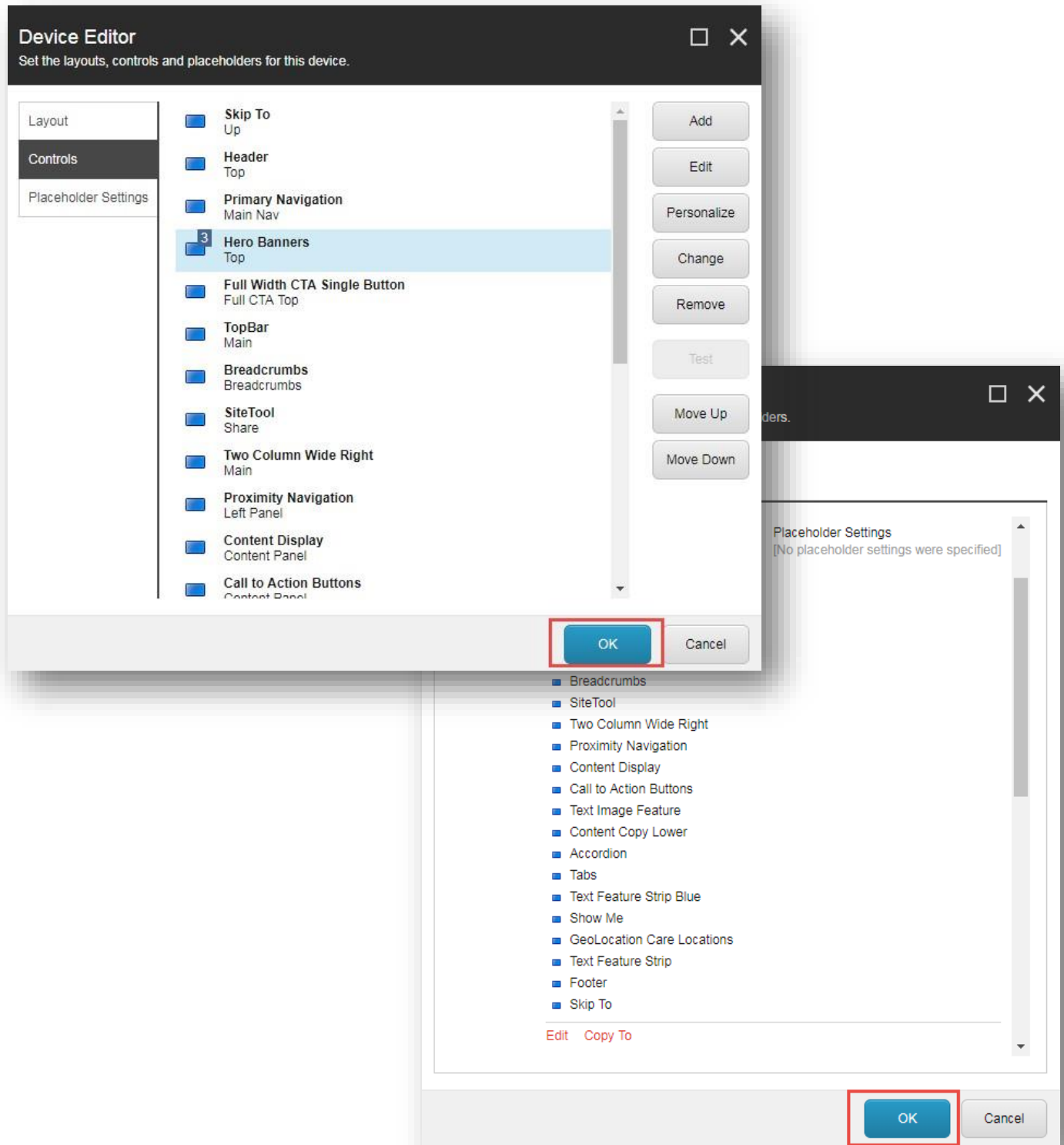
If none of the other conditions are true, the default condition is used.

☐ Hide Component

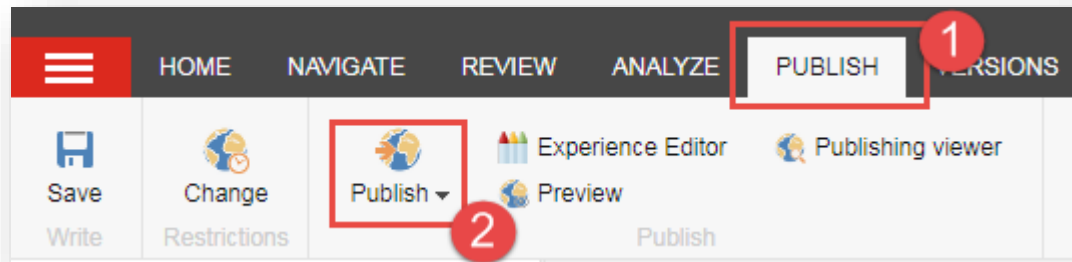
Personalize Content:

.../Default

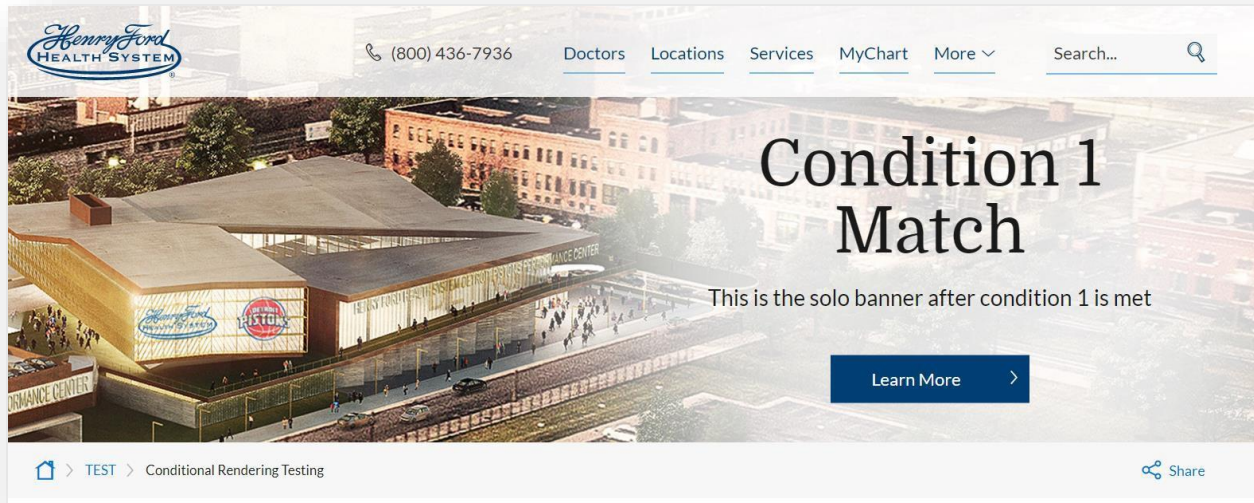
Once all conditions for the component have been updated, click **OK** to confirm all changes.



Save and publish your changes.



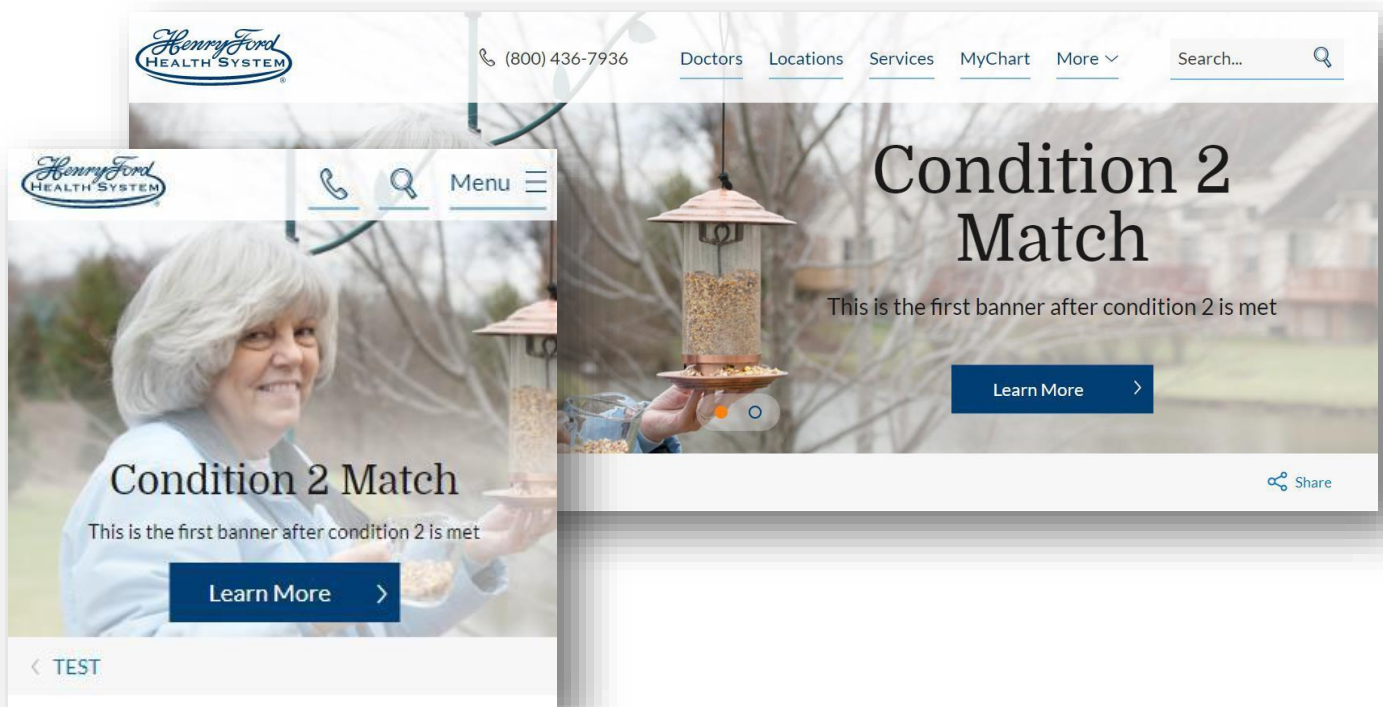
Example – Condition 1 Match



Dates/Times for Condition 1:

- Holidays/Dates under /sitecore/content/Global/ConditionalRendering/HFHS/Test Condition 1
- Wednesday 11am - 4:30pm EST

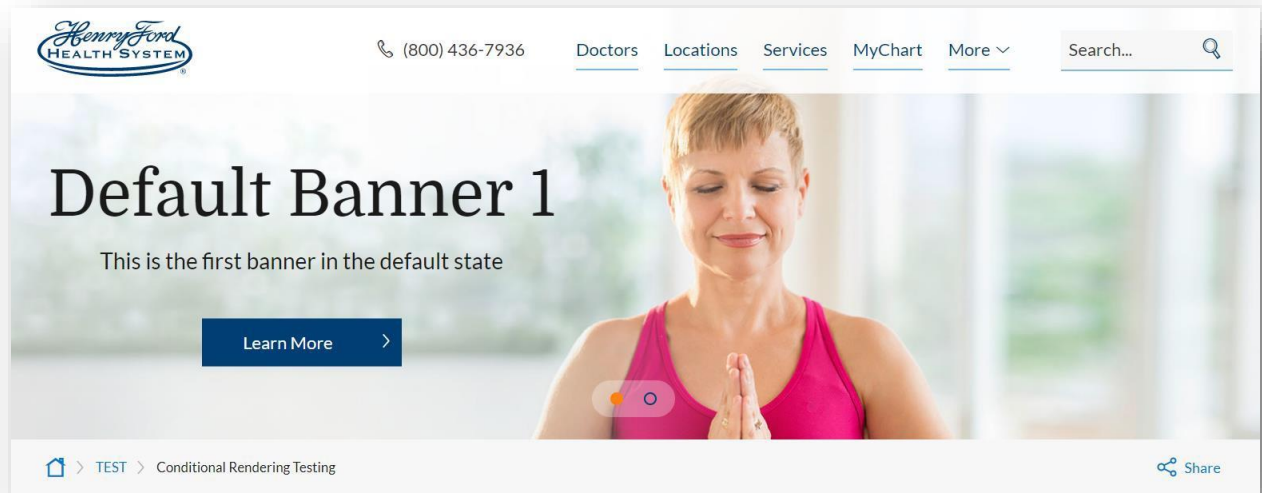
Example – Condition 2 Match



Dates/Times for Condition 2:

- Holidays/Dates under /sitecore/content/Global/Conditional Rendering/HFHS/Test Condition 2
- Mondays 12noon - Monday 1pm EST
- Mondays 4pm - Monday 9pm EST
- Tuesdays 5pm - Wednesdays 1am EST
- Thursdays 5pm - 9pm EST
- Fridays 5pm - Saturdays 12:59am EST
- Saturdays 8am - 8pm EST
- Sundays 11am - 4pm EST

Example – Default State



If conditions 1 and 2 have not been met, then the default hero banner(s) will render