Unica Asset Picker V12.0 Administrator's Guide

Contents

Chapter 1. Unica Asset Picker Administrator Guide

This guide provides information on how to install and configure Unica Asset Picker.

Installing Asset Picker

The Asset Picker component does not require any significant installation steps.

When installing Unica Platform, select **Asset Picker** in the **Components** screen to install Asset Picker. For more information, see Unica Platform Installation Guide.

Logs configuration

View the Asset Picker logging configuration in the `log4j.xml` file and the `log4j2.xml` file available in the `AssetPicker/conf/logging` folder inside Platform home. The logs produced by Asset Picker are placed within the `AssetPicker/logs` folder inside Platform home.

The `log4j.xml` file is used for setting up loggers, originating from Platform activities, such as configuration, user authorization etc.

The `log4j2.xml` file is used for the loggers originating from core activities of Asset Picker.

The default log level, in both cases, is set to `WARN`. This should suffice for any troubleshooting issues that might arise during installation.

For more information on configuring the `log4j.xml` file and the `log4j2.xml` file, see the official documentation Apache Log4j.

Configuring Asset Picker

To use Asset Picker in Unica Centralized Offer Management, you must configure it in Unica Platform.

To configure Asset Picker, complete the following steps:

1. Access the Unica Platform application with appropriate credentials.

2. Select **Settings > Configuration**.
   The **Configuration** page appears.

3. In the Configuration categories panel, select **Asset Picker** to expand the selection.

4. Configure the **navigation** settings. For more information, see Configuring navigation settings *(on page 2)*.

5. Configure the **proxy** settings. For more information, see Configuring proxy settings *(on page 3)*.

See Configuring navigation settings *(on page 2)*

Configuring navigation settings

Before configuring navigation settings, see Configuring Asset Picker *(on page 1)*.

Configure navigation settings so that Unica Centralized Offer Management knows the URL and the communication channel required to access the artifacts in the Asset Picker application.

To configure Asset Picker navigation settings, complete the following steps:

1. In the Configuration categories panel, select **Asset Picker > navigation**.
   The **Settings for 'navigation'** appears.

2. Click **Edit settings**.
   The **Edit settings** page for **(navigation)** appears.

3. Provide values for the following fields:

📝 **Note:** By default, values for all the fields exist. An administrator should edit the values of the fields **httpPort**, **httpsPort**, and **serverURL** only if the Asset Picker's deployment location is different than the default configuration.

- **seedName**
- **type**
- **httpPort** - The port number for communication in an unsecured connection.
- **httpsPort** - The port number for communication in a secured connection.
- **serverURL** - The URL of the server that contains the Asset Picker artifacts.
- **logoutURL**
- **displayName**

4. Click **Save changes**.

See Configuring proxy settings *(on page 3)*.

Configuring proxy settings

Before configuring proxy settings, see Configuring Asset Picker *(on page 1)* and Configuring navigation settings *(on page 2)*.

When you configure the proxy server, Asset Picker routes the outgoing connections to the target content management system.

To configure Asset Picker proxy settings, complete the following steps:

1. In the Configuration categories panel, select **Asset Picker > proxy**.
   The **Settings for proxy** appears.

2. Click **Edit settings**.
   The **Edit settings** page for **(proxy)** appears.

3. Provide values for the following fields:
   - **proxyHostName** - The proxy server host name.

> 📝 **Note:** Proxy settings are applied only if you provide an appropriate value for **proxyHostName**.

- **proxyPortNumber** - The port number for communication for the proxy server.
- **proxyType** - The type of communication with the proxy server. Currently only HTTP communication is supported.
- **dataSourceNameForProxyCredentials** -
- **unicaUserForProxyCredentials** -

4. Click **Save changes**.

5. Based on the configurations made for `dataSourceNameForProxyCredentials` and `unicaUserForProxyCredentials`, assign the datasource to the user with the HTTP proxy credentials.

Configuring a CMS integration with Asset Picker

You can configure third-party CMS with Asset Picker. Currently, Asset Picker only supports images from the CMS. When you create partitions in Unica Centralized Offer Management, an entry for Asset Picker resides in each partition. For example, if Unica Centralized Offer Management has three partitions, you can configure Asset Picker for all the partitions of Unica Centralized Offer Management.

To create partitions in Unica Centralized Offer Management, see the Unica Centralized Offer Management Installation Guide.

You can configure a third-party application that contains the artifacts, which can be accessed using the Unica Centralized Offer Management URL picker tool.

To configure a third-party CMS for integration with Asset Picker, complete the following steps:

1. Select **Settings > Configuration**.
   The **Configuration** page appears.

2. From the **Configuration categories** panel, select **Offer > partitions > partition <n> > Asset Picker > Data Sources > (CMS Configuration Template)**.

- **Offer** - The name provided to Unica Centralized Offer Management application.
- **partition <n>** - Here <n> represents the number of partitions. For example, if Unica Centralized Offer Management has two partitions, then **partition <n>** can be **partition 1** or **partition 2**.

The **Create category from template** page for **(CMS Configuration Template)** appears.

3. Provide values for the following fields:

- **New category name** - A name to identify the Asset Picker so that you can categorize the various assets.
- **System Identifier** - An internal name for identification.

  📝 **Note:** The **System Identifier** name must match the `systemId` used in the respective Asset Picker plugin. For more information on `systemID`, see *Unica Asset Picker Developer's Guide*.

- **User credentials** - Specify the user credential selection strategy for the target system. The available options are:
  - **Default user** - If you select **Default user**, the data source for **defaultUserCredentials** account is used while calling APIs of the target CMS.
  - **Logged-in user** - If you select **Logged-in user**, the data source of Unica's signed-in user account is used while calling APIs of the target CMS.
  - **Hierarchical** - If you select **Hierarchical**, the data source of Unica's signed-in user account is considered first. If the Unica's signed-in user account does not contain a data source, the **defaultUserCredentials** will be considered.
- **defaultUserCredentials** - The default Marketing Platform user having the target CMS credentials. The system uses this configuration when:
  - the User Credential strategy is the Default User.
  - the User Credential strategy is Hierarchical, but the logged-in user does not have the datasource associated. In such a case, the default user will be considered for credential selections.

- **Data source name for credentials** - The data source assigned to the Marketing Platform account. This data source authenticates the target system's REST API, database, etc.
- **Anonymous Content Access** - Select **Yes** if the target system accepts anonymous access to content or select **No** if the target system does not accept anonymous access to content.

  > 📒 **Note:**
  >   ◦ Asset Picker framework works with the protected APIs of the target CMS system. However, in this release, the target CMS should be configured for allowing anonymous guest user access to the content URLs.
  >   ◦ The 12.0 release only supports images in content type.

4. 📒 **Note:** If you have not provided credentials for the target system, or if the provided credentials are incorrect, the target system will decline the connection request. Before saving the changes, ensure that you have provided the credentials and that they are accurate.

   Click **Save changes**.

   A new entry, for example `<CMSName>`, appears under **Data sources** for the configured CMS. Expand the entry to see the following entries:
   - **<CMSName> | HTTP Gateway** - contains a configuration.
   - **<CMSName> | HTTP Gateway | REST** - contains a configuration.
   - **<CMSName> | QOS** - does not contain configurations.
   - **<CMSName> | QOS | Retry Policy** - contains configurations.

5. To configure **HTTP Gateway**, complete the following steps:

   a. In the **Configuration properties** pane, expand **<CMSName>** and select **HTTP Gateway**.
   The **Settings for 'HTTP Gateway'** page appears.

   b. Select **Edit settings**.
   The **(HTTP Gateway) Edit Settings** page appears.

c. For the **Base URL** field, specify the base location of the target system. Example:
`http://<hostname>:<port-number>`.

d. Click **Save changes**.

6. To configure **HTTP Gateway** | **REST**, complete the following steps:

a. In the **Configuration properties** pane, expand **HTTP Gateway** and select **REST**.
The **Settings for 'REST'** page appears.

b. Select **Edit settings**.
The **(REST) Edit Settings** page appears.

c. For the **Authentication Type** field, select from one of the following values:
- **Basic**

  Select **Basic** if the target system's API needs HTTP Basic Authentication.
  Credentials need to be set up accordingly under user's data source.
- **Bearer Token**

  Select **Bearer Token** if target system's API needs Bearer token authentication.
  (Bearer token must be configured in the password field of the desired user
  datasource. Username set up in datasource is ignored for this authentication
  type.)
- **Unica Token**

  The **Unica Token** option can be used if target system belongs to the Unica
  Product Suite. The **Unica Token** adds the necessary API token request headers
  during HTTP invocation. (User datasource assignment is not required for this
  authentication type since tokens are system generated.)
- **None**

  Select **None**, if the target system APIs are not protected by authentication, or
  if the target system uses authentication mechanism other than the supported
  ones and authentication is completely handled by the plugin implementation.

d. Click **Save changes**.

7. To configure **QOS | Retry Policy**, complete the following steps:

   a. In the **Configuration properties** pane, expand **QOS** and select **Retry Policy**.
      The **Settings for 'Retry Policy'** page appears.

   b. Select **Edit settings**.
      The **(Retry Policy) Edit Settings** page appears.

   c. Provide values for the following fields:
      - **Retry count**

        Specify the number of times Asset Picker should attempt to access target system.

      - **Initial delay**

        Specify the number of milliseconds to wait before making next attempt after failed access.

      - **Delay multiplier**

        Specify if the delay interval between subsequent attempts should be multiplied. Set this to 1 to keep a consistent delay between each attempt. Setting this value to greater than 1 increases the delay interval between each subsequent attempt. Similarly, setting this value to less than 1 decreases delay interval between subsequent attempts.

      Example

      If you provide the following values:
      - **Retry count** - 3
      - **Initial delay** - 1000
      - **Delay multiplier** - 1.2

      The first attempt will be made immediately to access the target system. If the first attempt fails, Asset Picker will wait for 1000 ms (1 second) before making the second attempt. And if the second attempt also fails, Asset Picker will wait for 1000 * 1.2 milliseconds (1.2 seconds) before making the third attempt. And if the third attempt also fails, Asset Picker will stop making any further attempt and terminate the operation.

> 📝 **Note:**
>
> The Asset Picker framework understands the settings explained earlier and automatically takes care of authentication, QOS, and other settings when the respective plugin is implemented using RESTful approach. For more information on RESTful approach, see the Unica Asset Picker Developer's Guide.
>
> The earlier mentioned properties can still be used for non-RESTful implementations. The Plugin developer can access all the settings programmatically and use them for plugin implementation. For example, you can use Base URL to configure any URL, or location, as per the target system type. This allows you to specify `jdbc:oracle:thin:@localhost:1521:xe` as the Base URL, if the target system is a database and it is used inside the respective Asset Picker plugin, when attempting a database connection.

    d. Click **Save changes**.

> 📝 **Note:**
>
> - If you have made changes to configurations, you should restart the Asset Picker application for the changes to come into effect.
> - Updates to user data source does not require a restart.
> - Configure the out-of-the-box integrations like Adobe Experience Manager (AEM) and HCL Digital Experience (DX or WCM). For more information, see Configuring the out-of-the-box integrations offered by Asset Picker *(on page 9)*.

Configuring the out-of-the-box integrations offered by Asset Picker

Asset Picker offers two out-of-the-box integrations, Adobe Experience Manager (AEM) and HCL Digital Experience (DX).

See .

To configure Adobe Experience Manager (AEM) and HCL Digital Experience (DX), complete the following steps:

1. **Setting up Adobe Experience Manager**

   a. Select **Settings > Configuration**.
      The **Configuration** page appears.

   b. From the **Configuration categories** panel, expand **Offer > partitions > partition <n> > Asset Picker > Data Sources > (CMS Configuration Template)**.
      The **Create category from template** for the **(CMS Configuration Template)** appears.

   c. Provide values for the following fields and click **Save changes**:
      - **New category name** - Specify an appropriate name to identify the new CMS. For example, `AEM`.
      - **System Identifier** - `AEM`.
      - **User credentials**
      - **defaultUserCredentials**
      - **Data source name for credentials**
      - **Anonymous Content Access** - Set this to **Yes**.

      For more information about the fields, see [Configuring a CMS integration with Asset Picker (on page 4)](#).

   d. In the **Configuration properties** pane, expand **AEM** and select **HTTP Gateway**.
      The **Settings for 'HTTP Gateway'** page appears.

   e. Select **Edit settings**.
      The **(HTTP Gateway) Edit Settings** page appears.

   f. For the AEM **Base URL** field, see [Configuring a CMS integration with Asset Picker (on page 4)](#).

   g. Click **Save changes**.

   h. In the **Configuration properties** pane, expand **HTTP Gateway** and select **REST**.

The **Settings for 'REST'** page appears.

i. Select **Edit settings**.

The **(REST) Edit Settings** page appears.

j. For the **Authentication Type** field, select the value `Basic`. If your AEM instance is set up to use a different authentication method, use a different value. For more information about the available values, see Configuring a CMS integration with Asset Picker *(on page 4)*.

k. Click **Save changes**.

l. In the **Configuration properties** pane, expand **QOS** and select **Retry Policy**.

The **Settings for 'Retry Policy'** page appears.

m. Select **Edit settings**.

The **(Retry Policy) Edit Settings** page appears.

n. For the **Retry policy** configurations, see Configuring a CMS integration with Asset Picker *(on page 4)*.

o. Click **Save changes**.

2. **Setting up HCL Digital Experience (DX)**

a. Select **Settings > Configuration**.

The **Configuration** page appears.

b. From the **Configuration categories** panel, expand **Offer > partitions > partition <n> > Asset Picker > Data Sources > (CMS Configuration Template)**.

The **Create category from template** for the **(CMS Configuration Template)** appears.

c. Provide values for the following fields and click **Save changes**:

- **New category name** - Specify an appropriate name to identify the new CMS. For example, `WCM`.
- **System Identifier** - `WCM`.

- • **User credentials**
- • **defaultUserCredentials**
- • **Data source name for credentials**
- • **Anonymous Content Access** - Set this to **Yes**.

For more information about the fields, see Configuring a CMS integration with Asset Picker (on page 4).

d. In the **Configuration properties** pane, expand **WCM** and select **HTTP Gateway**.

The **Settings for 'HTTP Gateway'** page appears.

e. Select **Edit settings**.

The **(HTTP Gateway) Edit Settings** page appears.

f. For the WCM **Base URL** field, see Configuring a CMS integration with Asset Picker (on page 4).

g. Click **Save changes**.

h. In the **Configuration properties** pane, expand **HTTP Gateway** and select **REST**.

The **Settings for 'REST'** page appears.

i. Select **Edit settings**.

The **(REST) Edit Settings** page appears.

j. For the **Authentication Type** field, select the value `Basic`. If your HCL DX instance is set up to use a different authentication method, use a different value. For more information about the available values, see Configuring a CMS integration with Asset Picker (on page 4).

k. Click **Save changes**.

l. In the **Configuration properties** pane, expand **QOS** and select **Retry Policy**.

The **Settings for 'Retry Policy'** page appears.

m. Select **Edit settings**.

The **(Retry Policy) Edit Settings** page appears.

n. For the **Retry policy** configurations, see [Configuring a CMS integration with Asset Picker](#) *(on page 4)*.

o. Click **Save changes**.

Verifying Asset Picker configuration in Unica Centralized Offer Management

After configuring Asset Picker, verify if the configuration in Centralized Offer Management to see is successful or not.

📝 **Note:** The verification steps are specific to Unica Centralized Offer Management.

To verify the Asset Picker configuration, complete the following steps:

1. Select **Settings > Offer settings**.

   The **Offer Settings** page appears.

2. Select **Offer template definitions**.

   The **Offer template definitions** page appears.

3. In the **Offer template definitions** page, click **+ Add new template**.

   The **Metadata** section of the **Add offer template details** page appears.

4. In the **Metadata** section, complete the following steps:

   a. In the Basic options, provide values for the following fields:
      - **Template display name** - Mandatory. An appropriate name for the custom template.
      - **Select template icon** - Mandatory. Select an appropriate icon from the available list. The selected icon appears beside the template name in the listing page.
      - **Security policy** - Mandatory. Select from the list of policies.

   b. Click **Next**.

The **Offer attributes** section appears.

5. In the **Offer attributes** section, complete the following steps:

   a. The **Offer attributes** section is divided into four panel:
      - **Available attributes**
      - **Parametrized attributes**
      - **Static attributes**
      - **Hidden attributes**

   b. To pick **Custom** attributes as a part of the template, select **Custom**, and drag-and-drop an attribute of type **Picker - URL** from the attributes list to the **Static attributes** panel. You can also search the **Custom** attributes using the search bar.

   c. Click **Next**.
      The **Default values** section appears.

   d. In the **Static attributes** drop-down panel, click **Browse**.
      The **Asset Picker** dialog appears.

6. If you see the artifacts from the configured URL, it is an indication that the configuration is successful. If you see an error, it is an indication that the configuration was unsuccessful.