

Unica Audience Central V12.1.7 User's Guide



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Chapter 1. Audience Central Overview

In the Unica 12.1.4 release, we have introduced a new application name Unica Audience Central

As the name suggests, Audience Central is a centralized application that you can use to create and manage audience levels.

Audience level is a way to broadly categorize or classify the target audience. In Unica Audience Central, a set of attributes is required to uniquely identify individual audience. For example, an audience level named `Prospects` can be used to deal with all prospects, wherein mobile number and/or email address attributes can be used to uniquely identify each prospect.

Audience Central is delivered with a single audience level called Customer. You can define any additional audience levels that you need. You can use Audience levels to target specific groups, such as Households, in marketing campaigns.

If you require additional audience levels, you must create and map the equivalent set of system tables to support them as you did for the default Customer audience level.

Before you create a new audience level, you must create four tables in the Unica Campaign system table database.

For an audience level, if required, you can map the following with system tables:

- A contact history table
- A detailed contact history table
- A response history table
- A segment membership table

Audience Central administrators can perform the following tasks:

- Create the audience levels needed for your company's marketing campaigns.
- Map system tables to the supporting database tables for the new audience levels in the Unica Campaign system database.
- Map audience levels to associated user database tables.



Note: Manually create system tables for supporting audience levels in the Unica Campaign system database.

About audience levels and strategic segments

For each audience that uses strategic segments, you map the segment membership system table to a physical table that defines segment members.

For example, to use the default `Customer` audience in an optimization session that includes strategic segments, you must map the audience system table `Customer_Segment_Membership` to the `UA_SegMembership` segment database table. You populate the database table using the Create Seg process.

Audience level unique identifiers

When you create a new audience level, you must specify at least one field to be used as the unique identifier for members of that audience level. To uniquely identify each member of the audience, you might need to use multiple fields.

For example:

- `Household` could be identified by the field `HHold_ID`
- `Customer` could be identified by the fields `HHold_ID` and `MemberNum`.

The field names (and in particular any unique identifier field names) in the new audience level must exactly match the field name(s) in the database table for history mapping. This allows Audience Central to automatically match the database fields to the appropriate system table fields when you create the history table mapping.



Note: Audience level field names have specific character restrictions.

About audience levels and user tables

A user table can be associated with a single audience level or with multiple audience levels.

User tables with a single audience level

When you map a user table, you must specify an audience level to be the primary audience of that table.

During this step, Audience Central associates the field(s) you specified when creating the audience level with the identifier field(s) in the user table. By doing this, you have specified that by default, when Audience Central makes selections from this user table, IDs are returned from the audience level.

For example, if you create an audience level named `Account` with the field `Acct_ID`, and select this audience level as an audience when mapping the user table `Accounts`, you have associated the `Account_ID` audience level field with the field in the user table that is the unique identifier (primary key) for the `Accounts` database table.

Required fields in audience-level-specific tables

The list of the required fields in the system tables, required for each audience level, are as follows:

Required fields in the contact history table

The contact history table for each audience level in the Audience Central system database must minimally contain the fields described in the following table:

Primary Key	Column Name	Data Type	Allow Nulls
Yes	Identifier for audience level	numeric or text	No
Yes	CellID	numeric	No
Yes	PackagelD	numeric	No
No	ContactDateTime	datetime	Yes
No	UpdateDateTime	datetime	Yes
No	ContactStatusID	numeric	Yes

Primary Key	Column Name	Data Type	Allow Nulls
No	DateID	numeric	Yes
No	TimeID	numeric	Yes

The detailed contact history table for each audience level in the Audience Central system database must minimally contain the fields described in the following table:

Table 1. Required fields in the detailed contact history table

Primary Key	Column Name	Data Type	Allow Nulls
Yes	Identifier for audience level	numeric or text	No
No	TreatmentInstID	numeric	No
No	ContactStatusID	numeric	Yes
No	ContactDateTime	datetime	Yes
No	UpdateDateTime	datetime	Yes
No	DateID	numeric	No
No	TimeID	numeric	No

Required fields in the response history table

The response history table for each audience level in the Audience Central system database must minimally contain the fields described in the following table:

Primary Key	Column Name	Data Type	Allow Nulls
Yes	Identifier for audience level.	numeric or text	No
Yes	TreatmentInstID	numeric	No
Yes	ResponsePackID	numeric	No
No	ResponseDateTime	datetime	No
No	WithinDateRangeFlg	numeric	Yes
No	OrigContactedFlg	numeric	Yes
No	BestAttrib	numeric	Yes
No	FractionalAttrib	numeric	Yes
No	CustomAttrib	numeric	Yes
No	ResponseTypeID	numeric	Yes
No	DateID	numeric	Yes
No	TimeID	numeric	Yes

Primary Key	Column Name	Data Type	Allow Nulls
No	DirectResponse	numeric	Yes

Required fields in the segment membership table

If you are using strategic segments, you must create the segment membership table for each audience level that you use with strategic segments. At a minimum, the table must contain the fields described in the following table:

Primary Key	Column Name	Data Type	Allow Nulls
Yes	SegmentID	numeric	No
Yes	Identifier for audience level	numeric or text	No

Audience Central APIs

You can access Audience Central APIs using Swagger.

You can form the URL in either of the following format to access or use the Audience Central APIs:

Format 1:

```
<AudienceCentralServerUrl>/AudienceCentral/swagger-ui/index.html
```

Format 2:

```
<AudienceCentralServerUrl>/swagger-ui/index.html?configUrl=../v3/api-docs/swagger-config&url=../v3/api-docs
```

Chapter 2. Accessing and using Audience Central

Before accessing Audience Central, ensure that it is installed and configured.


About this task

To access Audience Central, perform the following steps:

1. Log in to the Unica application.

Result

The Unica homepage appears.

2.  **Note:** You can switch between classic UI and Neo UI. For information on switching between classic UI and Neo UI, see *Unica Platform V12.1.4 Administration Guide*.

Perform either of the following steps:

- a. In case of classic UI, select **Marketing central > Audience Central**.

Result

The **All Audiences** page appears.



Note: If you cannot see the **Marketing central** menu or the **Audience Central** menu item, contact your Unica administrator.

- b. In case of the Neo UI, select the **Audience Central** tile, within the **Plan & Manage** section.

Result

The **All Audiences** page appears.



Note: If you cannot see the **Audience Central** tile, contact your Unica administrator.

Audience Central User Interface

The Audience Central user interface is simplistic and intuitive.

The user interface contains:

- a left panel that displays the audience levels and has provisions to add new audience levels.
- a right panel displays the audience overview and also has provisions to add base tables to the selected audience profile.

Creating audience levels

An audience level is a collection of consumer data that can be targeted by your company's marketing campaign.

About this task

To create audience levels, complete the following steps:

1. In the **Audience level** panel on the left, click **+ Audience**.

Result

The **Create new audience level** panel appears.

2. Provide an appropriate value for the field **Audience level name**.
3. To add field names and to assign field types, complete the following steps:
 - a. Select **Click here to add new field**.
 - b. Type an appropriate **Field Name**.
 - c. For **Type**, select the data type for the field. Available options are:
 - `Text`
 - `Numeric`
 - d. Repeat the steps *a* through *c* to add the required number of fields. You can drag-and-drop the fields to reorder them as per your requirement.
4. Click **Save**.

Result

The new entry appears in the **Audience level** panel.

Viewing audience levels

To view existing audience levels, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. In the right panel:

The **Overview** tab displays the following fields:

- **Audience level**
- **ID fields**
- **Map Contact history table**
- **Map Response history table**
- **Map Detailed contact history table**
- **Map Segment membership table**

The **Audience profile** tab displays a list of the added base tables. For more information about base tables, see [Adding base tables to the audience profile on page 10](#).

Mapping tables

Mapping Contact history table


About this task

To map contact history table with a datasource, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the  icon succeeding **Map Contact history table**.

Result

The **Map Contact history table** panel appears.

3. From the dropdown list, select an appropriate **Source table**.

Result

If the selected **Source table** is appropriate, in the **Required fields for table** section, the **Source table field** column is autopopulated with values that match the **Required field** column.


4. Click **Next**.

Result

The **Optional fields for table** section appears.

5. If you want to retain the optional fields from the source table, keep them selected. If you do not want some fields or all of the optional fields from the source table, deselect the unwanted fields or deselect all fields.


6. Click **Save**.

7. If required, you can remap or make modifications to an existing mapping. To remap the source table, select the  icon succeeding **Map Contact history table**.

Result

The **Map Contact history table** panel appears.

8. Perform *steps 3 through 6* to make the required changes.

9. If required, you can unmap the mapping to a source table. To unmap the mapping to a source table, select the  icon succeeding **Map Contact history table**.

Result

A confirmation box appears. Unmapping Contact history table also unmaps Detailed contact history table. See [Mapping Detailed contact history table on page 8](#).

10. Click **Unmap**.

Mapping Response history table


About this task

To map response history table with a datasource, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the  icon succeeding **Map Resposne history table**.

Result

The **Map Response history table** panel appears.

3. From the dropdown list, select an appropriate **Source table**.

Result

If the selected **Source table** is appropriate, in the **Required fields for table** section, the **Source table field** column is autopopulated with values that match the **Required field** column.


4. Click **Next**.

Result

The **Optional fields for table** section appears.

5. If you want to retain the optional fields from the source table, keep them selected. If you do not want some fields or all of the optional fields from the source table, deselect the unwanted fields or deselect all fields.


6. Click **Save**.

7. If required, you can remap or make modifications to an existing mapping. To remap the source table, select the  icon succeeding **Map Resposne history table**.

Result

The **Map Resposne history table** panel appears.

8. Perform *steps 3 through 6* to make the required changes.

9. If required, you can unmap the mapping to a source table. To unmap the mapping to a source table, select the  icon succeeding **Map Resposne history table**.

Result

A confirmation box appears.

10. Click **Unmap**.

Mapping Detailed contact history table

Before you begin

You can map Detailed contact histroy table only if you have mapped Contact history table. For more information, see [Mapping Contact history table on page 6](#).


About this task

To map detailed contact history table with a datasource, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the  icon succeeding **Map Detailed contact history table**.

Result

The **Map Detailed contact history table** panel appears.

3. From the dropdown list, select an appropriate **Source table**.

Result

If the selected **Source table** is appropriate, in the **Required fields for table** section, the **Source table field** column is autopopulated with values that match the **Required field** column.


- Click **Next**.

Result

The **Optional fields for table** section appears.

- If you want to retain the optional fields from the source table, keep them selected. If you do not want some fields or all of the optional fields from the source table, deselect the unwanted fields or deselect all fields.


- Click **Save**.

- If required, you can remap or make modifications to an existing mapping. To remap the source table, select the  icon succeeding **Map Detailed contact history table**.

Result

The **Map Detailed contact history table** panel appears.

- Perform *steps 3 through 6* to make the required changes.

- If required, you can unmap the mapping to a source table. To unmap the mapping to a source table, select the  icon succeeding **Map Detailed contact history table**.

Result

A confirmation box appears.

- Click **Unmap**.

Mapping Segment membership table


About this task

To map segment membership table with a datasource, complete the following steps:

- In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

- Select the  icon succeeding **Map Segment membership table**.

Result

The **Map Segment membership table** panel appears.

- From the dropdown list, select an appropriate **Source table**.

Result

If the selected **Source table** is appropriate, in the **Required fields for table** section, the **Source table field** column is autopopulated with values that match the **Required field** column.


- Click **Next**.

Result

The **Optional fields for table** section appears.

- If you want to retain the optional fields from the source table, keep them selected. If you do not want some fields or all of the optional fields from the source table, deselect the unwanted fields or deselect all fields.


- Click **Save**.

- If required, you can remap or make modifications to an existing mapping. To remap the source table, select the icon succeeding **Map Segment membership table**. 

Result

The **Map Segment membership table** panel appears.

- Perform *steps 3 through 6* to make the required changes.

- If required, you can unmap the mapping to a source table. To unmap the mapping to a source table, select the icon succeeding **Map Segment membership table**. 

Result

A confirmation box appears.

- Click **Unmap**.

Adding base tables to the audience profile

You can add one or multiple base tables to audience profiles.

About this task

From version 12.1.6, you can upload audience data from CSV files, map them, and the system internally creates a database table with the provided details and in the selected data source.

To add base tables, complete the following steps:

- In the **Audience level** panel on the left, select the required audience level. If required, you can create an audience level and select it after creation. To create an audience level, see [Creating audience levels on page 5](#).

Result

The right panel displays the details of the audience level.

- Select the **Audience profile** tab.
- Click **+ Base table**.

Result

The **Map input source - add base table** panel appears.

- In the **1. Data source** section, complete either of the following steps:
 - To add a base table from a data source, select the **Data source** option and perform the following steps:
 - Select the required data source.
 - Select the corresponding source table.
 - Click Next

- From version 12.1.6, you can add base tables using a CSV file. There are some conditions related to adding CSV files. For more information see [Configuration and Rules for uploading files for base tables on page 16](#). To add a base table using CSV files, select the **From file** option and perform the following steps:

From the server	<ol style="list-style-type: none"> Select the option From the server. To select a Source file from a folder in the partition, click Browse.
------------------------	--

	<p>iii. In the Select file panel, select the folder and the file and click Select. The partition displayed will be the Audience Central partition that the user can access.</p> <p>iv. If the first row of the CSV file does not contains field names, deselect the First row of data contains field names checkbox. If the first row of the CSV file contains field names, proceed to the next step.</p> <p>v. Click Next and move to <i>Step 5</i>.</p>
<p>From the computer</p>	<p>i. Select the option From the computer.</p> <p>ii. For the Upload CSV field, either drag-and-drop the file from your system to the UI, or select Upload file and navigate to the location on your system and select the required CSV file.</p> <p>iii. In the Select file panel, select the folder and the file and click Select. The partition displayed will be the Audience Central partition that the user can access.</p> <p>iv. If the first row of the CSV file does not contains field names, deselect the First row of data contains field names checkbox. If the first row of the CSV file contains field names, proceed to the next step.</p> <p>v. Click Next and move to <i>Step 5</i>.</p>

5. In the **2. Field name** section, complete the following steps:

- a. The data from the selected CSV file appears in the inline table. If you deselect the option **First row of data contains field names** in the **Data source** section, the CSV column name will have values like `Field 1`, `Field 2`, `Field 3`, and so on. If you keep the option **First row of data contains field names** selected, the field names from the CSV file appear.
- b. The field **Input source** displays the file type and the field **File name** displays the name of the uploaded file.
- c. Provide appropriate values for the following fields (all fields are mandatory):
 - **Select data source**
 - **Database table**
 - **Display table name**

- d. If required, you can change the data type of the fields in the **CSV column name** (in case the system identified an incorrect data type). In the **CSV column name**, for the required field, click the displayed data type succeeding the field. The **Edit the CSV column type** panel opens. You can select the field from the **Column name** and modify the **Field type** with the available options. The available options are **Numeric**, **Text**, and **Date**. After modification, click **Apply** to save the changes.
 - e. Additionally, you can also change the data type of the fields in the **Table column name**. In the **Table column name**, for the required field, click the displayed data type succeeding the field. The **Edit the table column type** panel opens. You can select the field from the **Column name** and modify the **Field type** with the available options. The available options are **Numeric** and **Text**. For **Numeric**, you can select `With decimal point` and `Without decimal point`. For **Text**, you can increase or decrease the maximum text size. After modification, click **Apply** to save the changes.
 - f. Click **Next**.
6. In the **3. Audience level & Assign ID fields** section, map all the fields in the **Audience Fields** column, use the dropdown to map the appropriate field in the **Fields from this table** column. Ensure that you map the numeric with numeric fields and text with text fields.
 7. Click **Next**.
 8. In the **4. Summary & Metadata** section, read the summary, confirm the details and metadata shown, and click **Save**. If you want to modify the details, click **Previous**.
 9. Click **Done**.

Result


The newly added base table appears in the base table list for the selected Audience profile.

What to do next

In Step 4b, if you select the option **From the computer** for uploading the CSV file, and if you have an updated version of the same CSV file, and if you wish to upload the updated data, you can update the data by performing the following steps:



Note: The icons for base tables are different for data uploaded from a data source and data uploaded from a CSV. Additionally, in case of data uploaded from a CSV, to identify if the base table was uploaded from the server or from the computer, hover the mouse over the icon preceding the base table name and the tooltip will provide an indication about the type of upload.

1. For the appropriate base table, hover the mouse over the three dots and select the  icon.
2. For the **Upload CSV** field, either drag-and-drop the file from your system to the UI, or select **Upload file** and navigate to the location on your system and select the updated CSV file.
3. Click **Upload**.

If the upload is successful, you will see the success message with the number of rows updated.

Searching for base tables in the audience profile tables list

If you have added a lot of base tables, it is easier to search and find the required base table.

About this task

To search for base tables in an audience level, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the **Audience profile** tab.
3. In the **Search** bar, type the name of the base table that you want to access.

Result

If the base table exists, the system displays the base table.

Remapping base tables

You can remap existing base tables to make modifications to the existing mappings.

About this task


To remap base tables, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the **Audience profile** tab.
3. Search for the required base table that you wish to remap. See [Searching for base tables in the audience profile tables list on page 12](#).

4. Place the cursor on the three dots succeeding the Base table record and select  .

Result

The **Edit base table** panel appears.

5. Make the required changes. For more information, see [Adding base tables to the audience profile on page 10](#).
6. Click **Save**.



CAUTION: If you remap existing base tables, on which the segments were created, those segments can have an impact depending on the changes that you have made.

Unmapping base tables

You can unmap existing base tables from an Audience profile.

About this task


To unmap existing base tables, complete the following steps:

1. In the **Audience level** panel on the left, select the required audience level.

Result

The right panel displays the details of the audience level.

2. Select the **Audience profile** tab.
3. Search for the required base table that you wish to unmap. See [Searching for base tables in the audience profile tables list on page 12](#).

4. Place the cursor on the three dots succeeding the Base table record and select .

Result

A confirmation box appears.

5. Click **Unmap**.



CAUTION: If you unmap existing base tables, on which the segments were created, those segments will fail when you publish them.


Deleting audience levels

In Audience Central, you cannot modify existing audience levels. You can only create new audience levels or delete existing audience levels.

About this task

To delete an existing audience level, complete the following steps:

1. In the **Audience level** panel on the left, select the required Audience level from the list.

2. Place the cursor on the three dots succeeding the audience level name and select the  icon.

Result

A confirmation box appears.

3. Click **Delete**.



CAUTION: Do not delete audience levels that are in use.


Adding Segments

From version 12.1.6, you can create Rule-based Segments from Audience Central. Since the functionality of Audience Central and Segment Central are tightly mapped to each other, we introduced adding rule-based segments from Audience Central.

About this task

After creating an Audience Profile, you had to access Segment Central to create rule-based segments. To eliminate the step of switching applications, and the burden of remembering the base table name and the audience level, we have added the rule-based segment creation feature in Audience Central. Since the segment creation uses the same APIs of Segment Central, you can modify the segments in Segment Central and Audience Central and the changes will be visible in both applications.

To create segments in Audience Central, complete the following steps:

1. Create a new audience level and select it, or select an existing audience level. To create a new audience level, see [Creating audience levels on page 5](#).
2. Select the **Audience profile** tab.
3. If the Audience profile has multiple base tables, for the required base table hover the mouse over the three dots and select .

Result

The **Create Segment** panel appears.

In the **Create Segment** panel, you will notice that the segment that you are about to create is already mapped to the Audience level and the Base table (Source table).

4. Use the Rule builder to add or form the required rules. For more information on Rule builder, see *Unica Segment Central User's Guide*.
5. Add the following details:
 - **Segment name**
 - **Description**
6. For the **Select a folder to save the segment** field, click **Browse**. When you select the required folder, the folder's **Security policy** is automatically applied
When you select a folder from the folder list, the path of the folder appears in the **Select a folder to save the segment**.
7. Enter a value for **Usage category** and click **Add**. You can add multiple usage categories.
8. Click one of the following buttons:
 - **Test run**: To do a test run and to confirm if the rule added is yielding the appropriate results.
 - **Save**: To save the segment as a draft.
 - **Save and publish**: To save and publish the segment.
9. If you click **Save and publish**, and when the success message appears, you will see a link to view the segment. Click the link and the segment page in Segment Central appears.
If you view the created segment, you have to navigate back to Audience Central, if you wish to create more segments from Audience Central.

Results

After adding a segment or multiple segments to an audience level, you can see the number of segments added to it in the **No. of segment** column. The **No. of segment** column is available on the Audience profile page and you may have to perform a horizontal scroll if it is not seen in the view. Clicking the number opens a panel containing the Segment Name and the number of records the segment fetched.

Chapter 3. Appendix

Configuration and Rules for uploading files for base tables

There are certain configurations that you must perform and certain rules that you must follow before uploading files for base tables:

- You can only upload files of type CSV.
- In case of **From the server** option, you can browse files only from the Audience Central home location.
- You can set the Date configuration path in Unica Platform at the following location: `Affinium|AudienceCentral|partitions|partition1|configuration`.
- For base table creation from a file, you cannot reorder columns.
- You can set the Data type configuration for the CSV columns in the **numRowsReadToParseDelimitedFile** field at the `Affinium|Campaign|partitions|partition1|server|internal` location.
- You must have the necessary permissions to map the delimited file to create base table mapping from file. If you do not have the necessary permissions, contact your Unica administrator.
- Audience Central supports only UTF 8 (without BOM) format for the CSV file.
- If you modify the Platform configuration for **Enable Audience Central management** or **Enable Segment Central management**, restart the server if Platform uses cache.
- You cannot use SQL keywords in table names and column names.
- If you use the timestamp date format, the timestamp must be in milliseconds.
- If data fields, like address, contains commas in the data, enclose such data within double quotes. For example, "Pune,Maharashtra,India".