

**Unica Plan and Unica Campaign  
V12.1.3 Integration Guide**



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# Chapter 1. Unica Plan and Unica Campaign Integration Guide

Contains information about the Unica Plan and Unica Campaign integration.

## Introduction to the integration

Unica Plan and Unica Campaign to use the marketing resource management features of Unica Plan to create, plan, and approve campaigns.

After integration, you manage campaigns, projects, offers, and Target Cell Spreadsheets in Unica Plan, for use within Unica Campaign. You create and run the flowcharts within Unica Campaign. Integration eliminates the need to enter cell information in both products.

## Integration with Unica Plan

Unica Campaign can be integrated with Unica Plan to use its marketing resource management features to create, plan, and approve campaigns.

When Unica Campaign is integrated with Unica Plan, many of the tasks that were previously done in a stand-alone Unica Campaign environment are done in Unica Plan. You do the following Unica Campaign tasks in Unica Plan when the products are integrated.

- Working with campaigns:
  - Creating campaigns
  - Viewing campaigns
  - Deleting campaigns
  - Working with campaign summary details
- Working with Target Cell Spreadsheets
- Assigning offers to cells
- Specifying control cells
- Creating and populating custom campaign attributes
- Creating and populating custom cell attributes

Only top-down cells are editable in Unica Plan. Bottom-up cells are not editable in Unica Plan.

These tasks are explained in the Unica Plan and Unica Campaign Integration Guide.

The following tasks are done in Unica Campaign in both stand-alone and integrated environments:

- Creating flowcharts
- Running flowcharts
- Detailed analysis of campaigns/offers/cells
- Reporting on Campaign performance (depending on the reporting pack installed)

If offer integration is also enabled, you do the following tasks in Unica Plan:

- Designing offers
  - Defining offer attributes
  - Creating offer templates
- Creating, approving, publishing, editing, and retiring offers
- Organizing offers into offer lists and offer folders

For information about enabling offer integration, see the chapter on "Managing offers and offer templates in an integrated system". For more information about offers, see the Unica Campaign guides for administrators and users.

## Overview of the data transfer between Unica Plan and Unica Campaign

The three main areas of data transfer are campaign data, cell data (in the TCS), and offer data. The transfer of data between the products is primarily one way, from Unica Plan to Unica Campaign.

When integration is enabled, the name and code of the campaign project in Unica Plan are the same as the name and code as the campaign in Unica Campaign. The campaign project in Unica Plan is automatically linked to the corresponding campaign in Unica Campaign.

Integration eliminates the need for duplicate data entry. Unica Plan provides a single view of all data and a single location to enter and edit data. You can view and edit shared data

only in Unica Plan. You use Unica Plan to control when data that is required for campaign execution is published.

The ongoing transfer of data must be initiated from Unica Plan through publishing. Unica Campaign responds to requests for data (for example, retrieval of cell status information or campaign metrics) and receives data from Unica Plan (for example, campaign attributes or TCS® data). However, Unica Campaign cannot send data to Unica Plan if the data was not requested.

## **Campaign data transfer**

In Unica Plan, you can define any number of custom campaign attributes and place them on a campaign project template, along with standard campaign attributes. You enter data for these attributes in Unica Plan and manually publish the data to Unica Campaign. In Unica Campaign, these campaign attributes are available as generated fields within the flowchart and for reporting and analytics. The Unica Plan user controls when a campaign is created in Unica Campaign and when campaign attribute data is published to Unica Campaign. Unica Campaign always uses the last set of published campaign attributes.

## **Cell data transfer**

The second major area of ongoing data transfer is the Target Cell Spreadsheet. The TCS® manages cell-level information for target and control cells, including cell names, cell codes, assigned offers, control cell linkages, and custom cell attributes. The transfer of cell definitions from Unica Plan to Unica Campaign and the transfer of cell status back to Unica Plan can be iterative. Companies often require several cycles before cell definitions and counts are finalized, rows of the TCS® are individually approved, and the campaign is ready to be run.

## **Offer data transfer**

For systems that enable offer integration, the third major area of ongoing data transfer is offer data. Offers are created in Unica Plan. When a new offer is created in Unica Plan, the offer state is Draft. Changing the state of an offer to Published pushes the offer instance to Unica Campaign. The first publish creates the offer in Unica Campaign; subsequent publishing updates the offer instance in Unica Campaign.

Similarly, changing the state of an offer template to Published pushes both the offer template and any offer attributes that you defined in Unica Plan to Unica Campaign.

When you initially enable offer integration, you can import any pre-existing offer metadata and data into Unica Plan from Unica Campaign. See [Importing offers from Unica Campaign \(on page 73\)](#).

## Differences between integrated and stand-alone Unica Campaign

When Unica Campaign is integrated with Unica Plan, the Unica Campaign installation differs from a stand-alone installation.

- The only way to create or access campaigns (other than campaigns created before you enabled integration) is through the corresponding Unica Plan project. The **All Campaigns** page in Unica Campaign displays only campaigns that were created before integration was enabled.
- The Target Cell Spreadsheet (TCS®) and custom cell attributes are created, viewed, and managed solely in Unica Plan. Custom cell attributes are defined in a "campaign project" template. As a result, each type of campaign can have different custom cell attributes, or present custom attributes in a different order. By contrast, in stand-alone Unica Campaign, all campaigns have the same cell attributes in the same order.
- The TCS® can be top-down or bottom-up. Bottom-up cells are allowed for integrated Unica Plan-Unica Campaign systems when the **MO\_UC\_BottomUpTargetCells** setting is Yes (**Settings > Configuration > Unica > Unica Campaign > partitions > partition[n] > server > internal**).
- If the **Bottom-up TCS** setting is Yes, flowcharts can be run in production mode in Unica Campaign even if they are not linked to top-down cells in the TCS®.
- The Summary tab for campaigns does not exist in Unica Campaign. To see summary information for a campaign, view the Campaign Summary section of the Summary tab in the campaign project in Unica Plan. The offer and segment information displays in a new Segments/Offer tab in Unica Campaign. Because you manage campaign project templates in Unica Plan, each campaign template can have a different set of campaign custom attributes. These custom attributes can be organized on one or more tabs within the project.

You also can take advantage of the more robust attribute features in Unica Plan. These features include options for layout, identifying attributes as required versus optional, making lists conditional in the user interface, and dynamic data values from database tables. In stand-alone Unica Campaign, all campaigns have the same custom campaign attributes in the same order.

- When offer integration is enabled by setting **Unica Plan - Offer integration** to Yes (**Settings > Configuration > Unica > Platform**), you cannot create or work with offer templates or offers in Unica Campaign. Instead, you use Unica Plan to create offer templates and to create, modify, approve, publish, or retire offers. Offer templates and approved offers can then be published to Unica Campaign for use.



**Note:** Offer integration is a separate option from campaign integration. When campaign integration is enabled, offer integration can also be enabled. For more information, see [Enabling offer integration in Unica Plan \(on page 72\)](#).

## Differences between integrated and stand-alone Unica Plan

If Unica Campaign integration is enabled, you manage campaign projects in Unica Plan and take advantage of tightly coupled Unica Campaign features. If offer integration is also enabled, you can manage offer lifecycles in Unica Plan and publish offers to Unica Campaign.

### Campaign project management

If Unica Campaign integration is enabled, users create projects in Unica Plan from campaign project templates.

In a stand-alone Unica Plan installation, campaign project templates are not available for creating new projects. In a stand-alone installation, you can create project templates to use for administering marketing campaigns. However, these objects do not link to a corresponding campaign or Target Cell Spreadsheet in Unica Campaign. There is no integration with offers, and no metrics are passed for campaign contacts and responders.

With an integrated installation, campaign projects have icons and links that initiate data transfers with Unica Campaign and that navigate to and from the corresponding campaign in Unica Campaign.

## Offer lifecycle management

If campaign integration is enabled, then you can also enable offer integration. If offer integration is enabled (**Settings > Configuration > HCL Unica > HCL Unica Platform**), you use Unica Plan exclusively for offer lifecycle management. You use Unica Plan to create offer templates and to create, modify, approve, publish, or retire offers. Approved offers can be published to Unica Campaign for use.

## License and permission issues for Unica Plan and Unica Campaign integration

When Unica Plan and Unica Campaign are integrated, every person who is involved in the design, creation, and execution of the campaign needs a Unica Plan license.

The team members who work exclusively in Unica Campaign such as flowchart developer, need a Unica Plan license so they can receive workflow notifications and access campaigns. In an integrated environment, the only way to access a campaign is through Unica Plan.

Some actions in a Unica Plan campaign project require a Unica Campaign permission. You can create a role in Unica Campaign that grants these permissions and assigns the role to users who work in Unica Plan. The following table lists the actions and the required permissions:

**Table 1. Permissions required for campaign actions**

**The following two-columned table describes action in one column, and required Campaign permissions in the second column.**

Action	Required Unica Campaign permission
Create linked campaign	Create Campaign

**Table 1. Permissions required for campaign actions**

The following two-columned table describes action in one column, and required Campaign permissions in the second column.

(continued)

Action	Required Unica Campaign permission
Update linked campaign	Edit campaign
Publish TCS®	Manage campaign target cells
Get cell run status	Manage campaign target cells
Search for and assign offers in TCS®	View offer summary
Import metrics	Analyze campaign

## Disable and re-enable integration

Although it is possible to disable integration after you enable it, it is best to avoid this action if possible.

### Disabling Unica Plan-Unica Campaign integration

If you disable Unica Plan and Unica Campaign integration, Unica Campaign reverts to its stand-alone behavior and appearance. However, there are several important issues to keep in mind:

- To access flowcharts that are associated with integrated campaigns after you disable the integration, you must publish all campaigns in Unica Plan before you turn off the integration. The campaigns are then available in the top-level folder in Unica Campaign.
- If you disable the integration, there is no navigation link between campaign projects and campaigns. Users can still access their campaign projects, but the icons for creating and updating campaigns are disabled. The options for publishing TCS® data and getting cell status are not available. Campaign project templates are not included in the list of templates that users see.

- If you want to re-enable integration, contact technical support to discuss the implications. Any changes that are made to campaigns while integration is disabled are overwritten the first time you update the campaign or publish the TCS® from within Unica Plan after you re-enable the integration.

## Disabling offer integration

Try to avoid disabling offer integration, as this action can lead to inconsistent data. For example, an offer is created in Unica Plan and published to Unica Campaign. After offer integration is turned off, that offer is modified in Unica Campaign. If offer integration is turned on again, the change that is made in Unica Campaign is not synchronized with Unica Plan. Unica Plan does not have the updated offer information, even if offer data is reimported from Unica Campaign. The transfer of data between the products is primarily one way, from Unica Plan to Unica Campaign.

## Integrating Unica Plan and Unica Campaign

The workflow for integrating Unica Plan and Unica Campaign consists of the following steps.

Complete the following steps to integrate Unica Plan and Unica Campaign.

1. Install both Unica Plan and Unica Campaign. For details, see the *Unica Plan Installation Guide* and the *Unica Campaign Installation Guide*.
2. Adjust the configuration settings to support an integrated deployment. See [Configuring property settings for integrated deployment \(on page 9\)](#).
3. Design the attributes, forms, and campaign project templates that you need.  
  
If offer integration is enabled on your system, you also design offer templates by using offer attributes. See [Offers and offer templates in an integrated system \(on page 70\)](#).
4. Create the shared attributes.
5. Create the forms and local attributes, including the form that contains the Target Cell Spreadsheet.

6. Create a metrics map file that associates Unica Campaign contact and response counts with Unica Plan metrics.
7. Create the campaign project and offer templates.

## Configuring property settings for integrated deployment

When Unica Plan and Unica Campaign are integrated, you use Unica Plan to plan, create, and approve campaigns.

For systems that enable offer integration, features for offer lifecycle management are added to Unica Plan. See [Enabling offer integration in Unica Plan \(on page 72\)](#).

To integrate Unica Plan and Unica Campaign, set the following properties.

1. On the **Settings > Configuration** page, under **HCL Unica**, click Unica Platform.
2. Click **Edit Settings** and set **Plan - Campaign** integration to True. This setting enables integration so that you can use Unica Plan to create, plan, and approve campaigns.
3. If your Unica Campaign installation has multiple partitions, set the properties for each partition where you want to enable integration. Expand **HCL Unica > Campaign > partitions > partition[n] > server** and click **internal**.
4. Click **Edit Settings** and set **MO\_UC\_integration** to **Yes**. This setting enables Unica Plan-Unica Campaign integration for this partition.



**Note:** To set either of the next two options to Yes, you must first set **MO\_UC\_integration** to **Yes**. The following options apply only when **MO\_UC\_integration** is enabled.

5. **Optional:** Set **MO\_UC\_BottomUpTargetCells** to **Yes**.

When **MO\_UC\_integration** is enabled, TCS® cells that are created from Unica Plan are always top-down. To allow for bottom-up Target Cell Spreadsheet cells for this partition, set this property to **Yes**. When set to **Yes**, both top-down and bottom-up target cells are visible, and a **Get Bottom Up Cells** control is available in the Unica Plan Target Cell Spreadsheet. This control gets bottom-up cells that are created in Unica Campaign into Unica Plan. The bottom-up cells are read-only in Unica Plan, and cannot be published back to Unica Campaign from Unica Plan.

**6. Optional: Set Legacy\_campaigns to Yes.**

This setting enables access to campaigns created before integration, including campaigns that were created in Affinium Campaign 7.x and linked to Affinium Plan 7.x projects.

7. Repeat steps 4-6 for other partitions as needed.

8. Expand **HCL Unica > Plan > umoConfiguration** and click **campaignIntegration**.

9. Click **Edit Settings** and set the **defaultCampaignPartition**.

When Unica Plan and Unica Campaign are integrated, this parameter specifies the default Unica Campaign partition to use when the campaign-partition-id is not defined by the project template. The default is **partition1**.

10. Set the **webServiceTimeoutInMilliseconds** for Web Services integration API calls.

This parameter is used as a timeout for web services API calls.

Continue with the steps for [Enabling offer integration in Unica Plan \(on page 72\)](#).

## Navigating from a linked legacy campaign to a Unica Plan project

Legacy campaigns are campaigns that were created in Unica Campaign before enabling integration with Unica Plan.

Follow this procedure if you are using an integrated system and you want to access campaigns that were created prior to the integration.

In an integrated environment, Unica Campaign can be configured to access the following types of legacy campaigns:

- Campaigns that were created in stand-alone Unica Campaign (whether in the current or a previous version of Unica Campaign) before integration was enabled. These campaigns cannot be linked to Unica Plan projects.
- Campaigns that were created in Affinium Unica Campaign 7.x and linked to Affinium Plan 7.x projects. Functionality of these campaigns remains unchanged from version 7.x of these products, based on the data mapping between attributes in both products.

You can use Unica Campaign to access and work with both types of legacy campaigns, even after enabling the integration.

1. Select **Campaign > Campaigns**.

The **All campaigns** page opens, displaying the folders or campaigns in the current partition. Only legacy campaigns are listed.

To view campaigns created with the Unica Plan-Unica Campaign integration enabled, click the **Campaign projects** folder. If there are no legacy campaigns or legacy campaigns have not been enabled in the configuration, this page is empty.

2. Click the name of the campaign that you previously linked to a project in Unica Plan or Affinium Plan.

The campaign opens to its **Summary** tab.

3. Click the name of the project in the **Parent items and code** field.

Unica Plan opens, and displays the **Summary** tab of the linked project.

4. To return to Unica Campaign, click the name of the project in the **Supporting projects and requests** field in Unica Plan.

## Unica Plan documentation and help

Different people in your organization use Unica Plan to accomplish different tasks.

Information about Unica Plan is available in a set of guides, each of which is intended for use by team members with specific objectives and skill sets.

The following table describes the information available in each guide.

**Table 2. Guides in the Unica Plan documentation set**

The following three-column table describes tasks in one column, guide names in the second column, and audience in the third column.

If you	See	Audience
<ul style="list-style-type: none"> <li>• Plan and manage projects</li> <li>• Establish workflow tasks, milestones, and personnel</li> <li>• Track project expenses</li> <li>• Get reviews and approvals for content</li> <li>• Produce reports</li> <li>• Create to-dos and checklists</li> </ul>	<p>Unica Plan User's Guide</p>	<ul style="list-style-type: none"> <li>• Project managers</li> <li>• Creative designers</li> <li>• Direct mail marketing managers</li> <li>• Marketers</li> </ul>
<ul style="list-style-type: none"> <li>• Design templates, forms, attributes, and metrics</li> <li>• Customize the user interface</li> <li>• Define user access levels and security</li> <li>• Implement optional features</li> <li>• Configure and tune Unica Plan</li> </ul>	<p>Unica Plan Administrator's Guide</p>	<ul style="list-style-type: none"> <li>• Project managers</li> <li>• IT administrators</li> <li>• Implementation consultants</li> </ul>

**Table 2. Guides in the Unica Plan documentation set**

The following three-column table describes tasks in one column, guide names in the second column, and audience in the third column.

(continued)

If you	See	Audience
<ul style="list-style-type: none"> <li>• Create marketing campaigns</li> <li>• Plan offers</li> <li>• Implement integration between Unica Plan and Unica Campaign</li> <li>• Implement integration between Unica Plan and IBM Digital Recommendations</li> </ul>	Unica Plan and Integration Guide	<ul style="list-style-type: none"> <li>• Project managers</li> <li>• Marketing execution specialists</li> <li>• Direct marketing managers</li> </ul>
<ul style="list-style-type: none"> <li>• Learn about new system features</li> <li>• Research known issues and workarounds</li> </ul>	Unica Plan Release Notes®	Everyone who uses Unica Plan
<ul style="list-style-type: none"> <li>• Install Unica Plan</li> <li>• Configure Unica Plan</li> <li>• Upgrade to a new version of Unica Plan</li> </ul>	Unica Plan Installation Guide	<ul style="list-style-type: none"> <li>• Software implementation consultants</li> <li>• IT administrators</li> <li>• Database administrators</li> </ul>
Create custom procedures to integrate Unica Plan with other applications	Unica Plan Integration Module and the API JavaDocs available when you click <b>Help &gt; Product Documentation</b> in Unica Plan, and then download the <code>UnicaPlan&lt;ver-</code>	<ul style="list-style-type: none"> <li>• IT administrators</li> <li>• Database administrators</li> <li>• Implementation consultants</li> </ul>

**Table 2. Guides in the Unica Plan documentation set**

The following three-column table describes tasks in one column, guide names in the second column, and audience in the third column.

(continued)

If you	See	Audience
	<code>tion&gt;PublicAPI.zip</code> file for the SOAP API and <code>UnicaPlan&lt;version&gt;PublicAPI-RestClient.zip</code> for the REST API.	
Learn about the structure of the Unica Plan database	Unica Plan System Schema	Database administrators
Need more information while you work	<ul style="list-style-type: none"> <li>• Get help and search or browse the <i>User's, Administrator's, or Installation</i> guides: Click <b>Help &gt; Help for this page</b></li> <li>• Access all of the Unica Plan guides: Click <b>Help &gt; Product Documentation</b></li> <li>• Access guides for all Unica products: Click <b>Help &gt; All Unica Suite Documentation</b></li> </ul>	Everyone who uses Unica Plan

## Unica Campaign project template design

You can create as many campaign project templates as you want. For example, you might want to create a separate campaign project template for each type of campaign that you run.

You create a separate template for each unique combination of forms you need. For example, if you need to gather different information to define your target cells for some campaigns, you create different Target Cell Spreadsheets (TCS®). Then, associate each TCS® with a different template. Similarly, if some custom campaign attributes are relevant only for certain types of campaigns, you can create different campaign project templates. You can create separate templates to control custom campaign attributes, the attribute display order, and their organization on tabs.

## Design your campaign project templates, forms, and attributes

Before you begin creating objects in Unica Plan, you plan and design your campaign project templates and the forms and attributes they require.

The result of the design process is a list of attributes and forms to create and details about them, such as:

- Whether an attribute is suited for use on multiple forms (shared) or on a single form (local)
- Whether users select from data that is supplied by a table, a list of items you define, or enter text directly for an attribute
- What constraints are needed on the user interface field, and whether an offer attribute must be parameterized (editable) when added to a form, or set to static or hidden static

Campaign attributes and cell attributes must be shared attributes. Form and grid attributes can be either shared or local.

## Target Cell Spreadsheet and other forms

By default, projects have the following tabs: Summary, People, Workflow, Tracking, Attachments, and Analysis. If the Financial Management module is installed, projects also have a Budget tab.

In a campaign project, the Summary tab includes a set of fields for basic campaign information. You cannot remove or reorder these basic campaign attributes.

If you want to enable users to enter more information about the project, you must create forms and add the forms to the project template. Each form displays on the Summary tab or on another tab in projects that are created from that template.

All campaign project templates must have a TCS® form. Other forms are optional.

## Campaign Summary section

All campaign projects contain a **Campaign Summary** section on the **Summary** tab.

The **Campaign Summary** section contains the following default campaign attributes:

**Table 3. Default campaign attributes on the Campaign Summary section**

The following two-columned table contains attributes in one column and field description in the second column.

Attribute	Field Description
Campaign description	Text field
Campaign start date	Date field
Campaign end date	Date field
Campaign objective	Text field
Campaign initiative	Text field
Campaign security policy	Drop-down list with all the security policies defined for Unica Campaign

The default campaign attributes do not display in the list of campaign attributes on the **Shared Attributes** page in the Administrative Settings and cannot be edited.

## Target cell spreadsheets

A Target Cell Spreadsheet (TCS®) is an editable grid component that has a set of predefined attributes. You use Target Cell Spreadsheets when Unica Plan-Unica Campaign integration is enabled.

The TCS® specifies the data that users must enter in a campaign project to define the target and control cells for the campaign. Each column on the TCS® corresponds to an attribute. Values for the predefined, or default, attributes are automatically passed to Unica Campaign. In addition to these default attributes, you can add an unlimited number of custom attributes to a TCS®.

### **Cell attributes and grid attributes**

A TCS® can contain attributes that get passed to Unica Campaign (cell attributes) and attributes that display only in Unica Plan (grid attributes).

Use cell attributes for information you want to pass to Unica Campaign. For example, attribute values you want to include in an output list, contact history, or report must be created as cell attributes.

Use grid attributes for descriptions, calculations, and data that is not needed in Unica Campaign.

### **Target Cell Spreadsheets and forms**

You add a TCS® to a form by creating a new editable grid and identifying it as a TCS®. (The form can contain other attributes in addition to the TCS®.) When you place a TCS® grid component on a form, it contains the default cell attributes. You cannot delete the default attributes.

### **Transfer of cell attribute data**

When a user links a flowchart cell to the TCS® row, the data values supplied for the default attributes are passed to Unica Campaign automatically. Custom cell attributes are available automatically in Unica Campaign as Unica Campaign Generated fields in contact processes. For details on Generated fields, see the Unica Campaign User's Guide.

### **Target Cell Spreadsheets and templates**

Each campaign project template can contain only one TCS®.

## Default cell attributes for Target Cell Spreadsheets

All TCS® grids include the predefined cell attributes by default. These attributes are available specifically for use in a TCS® grid, and not displayed on the **Shared Attributes** page.

Descriptions of how these attributes display to users in a campaign project follow.

**Table 4. Default cell attributes**

The following three-columned table describes cell names in one column, publish requirements in the second column, and their description in the third column.

Name	Required to publish the TCS®?	Description
Cell Name	Yes	Text field.
Cell Code	No	Text field.
Description	No	Text field.
Is Control Cell	Yes	Drop-down list with Yes and No options.
Control Cell	No	Drop-down list of control cells.
Assigned Offers	No	A selection control that you can use to select one or more offers or offer lists.
Is Approved	No	Drop-down list with Yes and No options. This column is included only if <b>Approval required</b> is checked in the campaign project template.
Flowchart	No	Read-only field that displays the name of the flowchart in which the cell is used.
Last Run	No	Read-only field that displays the date and time that the flowchart that contains this cell was last run.

**Table 4. Default cell attributes**

The following three-columned table describes cell names in one column, publish requirements in the second column, and their description in the third column.

(continued)

Name	Required to publish the TCS®?	Description
Actual Count	No	Read-only field that shows the last run count for this cell (count of unique audience IDs in the cell).
Run Type	No	Read-only field that shows the run type for the last run for the flowchart that contains this cell (production or test; flowchart, branch, or process box).

After you add a TCS® grid, you can edit the Attribute Display Name, Description, and some of the other properties for the individual cell attributes. You cannot edit the predefined values for these properties:

- Attribute Category
- Attribute Type
- Attribute Internal Name
- Attribute Display Name
- Attribute Database Column Name
- Can group by
- Form Element Type
- Special behavior

## Designing offer templates

If offer integration is enabled, you can create offer templates in Unica Plan to guide users in creating offers. To work with offer templates, you design the templates first and then create the custom offer attributes and forms that are used to build them.



**Note:** For more information about administering and by using offers, see the Unica Campaign guides for administrators and users.

1. When you are ready to create an offer template, select **Settings > Plan Settings > Template Configuration > Templates**.
2. Complete the options in the **Offer Templates** section.
3. You can import from Unica Campaign any pre-existing offer templates, attributes, offers, offer lists, and offer folders.

## Including IBM Digital Recommendations categories

In Unica Plan, administrators can configure offer templates to populate category data that uses IBM Digital Recommendations.

The server that hosts Unica Plan must have internet connectivity that is enabled. When users create offers from these templates, they choose a client ID and category IDs and names from lists instead of entering them manually.

To implement this feature in an offer template:

1. Select the **Use Offer Integration** check box.
2. Supply the **URL** for Digital Recommendations.



**Note:** After users create offer instances from this template, do not change the supplied URL.

3. Specify **Client IDs**: you can enter values then **Add** them, or you can **Import** values from a previously defined list. See [Defining the client list \(on page 21\)](#).

When users create an offer from a template that is configured in this way, they select a client ID from the list of values you supplied. The list of category names and IDs for the selected client is then populated directly from Digital Recommendations.

## Defining the client list

The Unica Plan user interface presents several list box controls that administrators can configure with customized options.



**Note:** For more information about defined lists, see the chapter on "Defining list options" in the *Unica Plan Administrator's Guide*.

To define a list of the client IDs and names in use by an IBM Digital Recommendations implementation, complete the following step.

Select **Settings > List Definitions > Coremetrics Clients**.

## Designing attributes

Each item of information that users can enter for a project has a corresponding attribute on a tab in the template.

To include information in campaign, cell, or offer performance reports, make sure that information is collected by a corresponding attribute. The information is passed to Unica Campaign by a campaign, cell, or offer attribute.

Campaign project templates can include the following attribute categories:

- For information that is used only in Unica Plan on a form outside of a grid, use form attributes.
- For information is used only in Unica Plan on a form within a grid (including TCS® grids), use grid attributes.
- For information that is shared with Unica Campaign and that appears on a form outside of a grid, use campaign attributes.
- For information that is shared with Unica Campaign and that appears on a form within the TCS® grid, use cell attributes.
- For systems that also integrate offers, use offer attributes to collect offer information to share with Unica Campaign.

Offer attributes are synchronized with Unica Campaign when an offer that uses the attributes is published to Unica Campaign.

- To view or define shared attributes, choose **Settings > Plan Settings > Template Configuration > Shared Attributes**.

You create all campaign, cell, and offer attributes as shared attributes. You can create form and grid attributes as local if they are relevant to a single form only, or shared if you plan to use them on multiple forms.



**Note:** Standard, default attributes cannot be edited, and are not listed on the **Shared Attributes** page. For example, default cell attributes appear in all Target Cell Spreadsheets, but are not listed on the **Shared Attributes** page.

## Unica Campaign attributes

When Unica Plan and Unica Campaign are integrated, you create custom Unica Campaign attributes in Unica Plan. All Unica Campaign attributes are shared, and you use Unica Plan to add them to the forms that make up your campaign project templates.

When users create the linked campaign for a campaign project from a template that includes custom campaign attributes, the corresponding attributes are created in Unica Campaign. If users change the data they enter in a field that is created by a campaign attribute after they create the linked campaign, they must update the campaign to send the new information to Unica Campaign. You use campaign attribute descriptions and form descriptions to inform users which fields require them to update the campaign.

## Cell attributes

Cell attributes are Unica Plan attributes that map to Unica Campaign for use in Target Cell Spreadsheets. Unica Plan includes a set of default cell attributes that are included in every TCS®.

You can also create custom cell attributes in Unica Plan. When users create the linked campaign for a campaign project from a template that includes custom cell attributes, the corresponding cell attributes are created automatically in Unica Campaign.

## Offer attributes

When offer integration is enabled, a set of standard offer attributes is supplied in Unica Plan to correspond to the standard attributes in Unica Campaign. You can also create custom offer attributes in Unica Plan.

All offer attributes are shared attributes.

To work with offer attributes, select **Settings > Unica Plan Settings > Template Configuration > Shared Attributes**.

## Standard offer attributes in Unica Campaign

The following table lists the offer attributes that are delivered with Unica Campaign available in Unica Plan systems that enable offer integration.

**Table 5. Standard offer attributes**

Attribute Display Name	Attribute Internal Name*	Form Element Type Attribute Type
Average Avg. Response Revenue	AverageResponseRevenue	Text Field - CurrencyMoney
Channel	Channel	Select Box - StringSingle-Select
Channel Type	ChannelType	Select Box - StringSingle-Select
Cost Per Offer	CostPerOffer	Text Field - CurrencyMoney
Creative URL	CreativeURL	Text Field - StringCreative URL
Effective Date	EffectiveDate	Text Field - DateDate Select
Expiration Date	ExpirationDate	Text Field - DateDate Select
Expiration Duration	ExpirationDuration	Text Field - NumericFloat

**Table 5. Standard offer attributes (continued)**

<b>Attribute Display Name</b>	<b>Attribute Internal Name*</b>	<b>Form Element Type Attribute Type</b>
Fulfillment Cost	FulfillmentCost	Text Field - CurrencyMoney
Interaction Point ID	UACInteractionPointID	Text Field - NumericFloat
Interaction Point	UACInteractionPointName	Text Field - StringText - Single-Line
Offer Fixed Cost	OfferFixedCost	Text Field - CurrencyMoney

\*In Unica Plan systems that enable offer integration, attribute internal names are stored as all lowercase text.

## Offer attribute behavior options

When administrators import an offer attribute into a form, they select its behavior and supply a default value.

The behavior options for an offer attribute are:

- **Parameterized**, which means that the attribute is a required field in the user interface. Users can accept the default or supply a different value.
- **Static**, which means that the attribute is an optional field in the user interface. Users can accept the default, supply a different value, or leave the field null.
- **Hidden static**, which means that the attribute and value do not display to users. Hidden static attributes and their values can be included in reports.

These behavior choices correspond to the ways you can use offers in Unica Campaign. For more information about these choices, see the Unica Campaign Administrator's Guide.

To define the behavior for an offer attribute in a form (when you import attributes into the form you select Static, Hidden, or Parameterized Attributes), click the name of the attribute and click >>.

## Creative URL offer attribute

A "Creative URL" is a link to a digital asset, such as a product logo, brand image, marketing research document, or document template. When an offer template includes the system-supplied Creative URL offer attribute, users select a digital asset from the Unica Plan asset libraries to include in each offer.

The Creative URL offer attribute is a system-supplied, shared attribute with the following characteristics.

- When administrators work with form definitions in Unica Plan, they can import the shared Creative URL attribute as parameterized, static, or hidden. If Creative URL is parameterized, an asset value is required in the form definition and corresponding offer instances.
- The Creative URL attribute has its own attribute type. In the user interface, the Creative URL attribute type presents a field and associated **Select** button. Users click **Select** to choose an existing asset or to add an asset. The asset name displays in the associated field.
- When administrators export or import a form or an offer template, both the source and target systems must be running the same version of Unica Plan. The export and import files use an internal field name of **digitalasset** for the Creative URL attribute.
- When administrators set up customized alerts, the Creative URL attribute can be included as a variable. The message text displays the asset name.
- Users can include columns for the Creative URL attribute on the **Operations > Offers** list page.
- On the **Operations > Offers** list page, users can use the Creative URL attribute to search for offers. The search uses the asset name.
- When users create a smart offer list, they can include the Creative URL attribute in its conditions. The condition uses the asset name to return results.

## Campaign, cell, and offer attributes

Only attribute types that exist in both Unica Plan and Unica Campaign are available for campaign and cell attributes.

For systems that also integrate offers, the same constraint applies to offer attributes with the following exception: when published to Unica Campaign, the attribute type for the Creative URL offer attribute changes to Text Field - String.

**Table 6. Attribute types for campaign, cell, and offer attributes in Unica Plan**

<b>Attribute type</b>	<b>Campaign attributes</b>	<b>Cell attributes</b>	<b>Offer attributes</b>
Text - Single-Line	X	X	X
Text - Multi-Line	X	X	X
Single-Select	X		X
Single-Select - Database	X		X
Multiple-Select - Database			
Yes or No	X	X	
Date Select	X	X	X
Integer	X	X	
Decimal	X	X	X
Money	X	X	X
User-Select			
External Data source			
Calculated	X	X	X
URL Field			
Single Select Object Reference			
Multi-Select Object Reference			
Image			

**Table 6. Attribute types for campaign, cell, and offer attributes in Unica Plan**  
(continued)

Attribute type	Campaign attributes	Cell attributes	Offer attributes
Creative URL			X
Rich text type			



**Note:** For attributes that have the Single-Select - Database attribute type, Unica Plan passes the lookup value (not the display value) of the selection to Unica Campaign. You determine the lookup value and the display value when you create the lookup table.

There is no attribute type in Unica Plan that corresponds to the "Modifiable drop-down list" that is available for custom attributes in stand-alone Unica Campaign.

## Creating and enabling a shared attribute

You can create and enable a shared attribute by using Unica Plan shared attributes function.

1. Select **Settings > Plan Settings**.
2. Click **Template Configuration**.
3. Click **Shared Attributes**.

The page that displays contains one section for each shared attribute category.

4. Click **Create a <category> Attribute** for the attribute you want to create.

The **Create a New Shared Attribute** dialog opens.

5. Supply values to define the attribute.
6. Click **Save and Exit** to create the attribute and return to the **Shared Attributes** page, or click **Save and Create Another** to create the attribute and enter values for another new attribute.

You can select a different attribute category.

7. On the **Shared Attributes** page, click **Enable** in the row for each new attribute to make it available for use on a form.

## Creating a Flowchart approval

You can create a Flowchart approval by following these steps.

1. In an integrated environment, create campaign project by clicking on Operations -> Project -> Add project
2. Select Campaign template
3. Create linked campaign
4. On Implementation tab, create Flow chart
5. Click on Planning tab
6. Select Workflow -> Edit
7. Click on Add Row -> Flowchart Approval
8. Click on Save and Finish
9. Reopen Flowchart approval, Select Approver, Target due date, Flowcharts to approve
10. Click on Send approval

## Creating a Target Cell Spreadsheet

You can create a Target Cell Spreadsheet by following these steps.

Before you create a TCS, you must create any custom cell attributes that you want to include. Cell attributes map to Unica Campaign and can be created only as shared attributes.

1. Select **Settings > Plan Settings**.
2. Under **Other Options**, click **Template Configuration**.
3. Under **Template Components**, click **Forms**.
4. On the **Form Definitions** page, click **Create New Form**.  
The **Form Editor** interface displays.



**Note:** Ensure that you do not use the "uap" and "umcm" prefixes while defining tables for forms and grids.

5. Complete the **Form Properties** tab and click **Save Changes**.

The **Add an Element** tab displays.

6. Click **Create New Grid**.

The **Create New Grid** dialog opens.

7. From the **Grid Type** drop-down list, select **Editable Grid View**.

8. Select the **Is TCS** check box.

9. Complete the remaining options and click **Save and Exit**.

On the **Add an Element** tab, click to expand the list of **Form Attributes**. Your TCS grid component displays.

10. To add a TCS grid to a form, you must place it within a group. If the form does not already contain a group for the grid, click and drag **Attribute Group Header** onto the form design area then name it appropriately.

11. From the list of **Form Elements**, click and drag your TCS® grid component and drop it onto the group.

The default cell attributes display on the grid. See [Default cell attributes for Target Cell Spreadsheets \(on page 18\)](#).

12. Add any attributes that you want to include in the TCS. You can do either of the following steps.

- Import custom cell attributes and add them to the TCS to create more columns. these columns are passed to Unica Campaign.
- Create or import grid attributes and add them to the TCS to create more columns. These columns display only in Unica Plan.



**Note:** Ensure that you do not use the "uap" and "umcm" prefixes while defining tables for forms and grids.

13. Click **Save and Exit** to save the TCS and return to the **Form Definitions** list page.

## Share Unica Campaign contact and response data with Unica Plan

To enable users to import contact and response counts into Unica Plan, you must map the contact count and the response types to Unica Plan metrics.



**Note:** Unica Campaign passes data to Unica Plan for one audience level only, the audience level that is mapped to the UA\_ContactHistory, UA\_ResponseHistory, and UA\_DtlContactHist system tables. The audience level can be any audience level, with any number of audience key fields of any data type or name. For details on audience levels, see the Unica Campaign documentation.

The response types are stored in the UA\_UsrResponseType system table in the Unica Campaign database. To map a metric to a response type, you must know the name of the response type.

The mappings are stored in an XML file.

### Mapping Unica Campaign contact and response counts to Unica Plan metrics

If you want users to be able to import contact and response counts into Unica Plan, you must map contact count and the response types to Unica Plan metrics.



**Note:** Unica Campaign passes data to Unica Plan for one audience level only, the audience level that is mapped to the UA\_ContactHistory, UA\_ResponseHistory, and UA\_DtlContactHist system tables. The audience level can be any audience level, with any number of audience key fields of any data type or name. For details on audience levels, see the Unica Campaign documentation.

The response types are stored in the UA\_UsrResponseType system table in the Unica Campaign database. To map a metric to a response type, you must know the name of the response type.

The mappings are stored in an XML file.

1. In Unica Campaign, modify the list of response types in the UA\_UsrResponseType table if necessary to include the response types you want to track.
2. Edit the Unica Plan metrics file being used by your system to include metrics that correspond to contact count and the response types.
3. Create a map file that associates the Unica Plan metrics with contact count and the response types.
4. Add the map file to Unica Plan.
5. Create a campaign template and select the map file from the **Metric Data Mapping** drop-down list.

The contact and response data is mapped to metrics for all projects that are created from that template.

## Metrics data mapping file

You define the metrics to map your data.

The metrics data mapping file must use the container elements `<metric-data-mapping>` and `</metric-data-mapping>`.

The next line in the mapping file must be as follows:

```
<datasource type="webservice">
  <service-url>CampaignServices</service-url>
</datasource>
```

The actual mappings must be contained by the elements `<metric-data-map>` and `</metric-data-map>`.

### **metric**

Use the `<metric>` element to define the metric in a mapping. The `<metric>` element has no value but must contain the child element `<data-map-column>`. The `<metric>` element has the following attributes:

Attribute	Description
id	The internal name of the metric
dimension-id	The number of the column into which the value from Unica Campaign should be placed. Columns are numbered from left to right. The first column is column 0.

## data-map-column

Use the `<data-map-column>` element to define the data source (either contact count or a response type) in a mapping. The `<data-map-column>` element must be contained by the `<metric>` element that defines the metric to which contact count or this response type is mapped. The `<data-map-column>` element has no value but has the following attributes:

Attribute	Description
id	The data source to be mapped to the metric. For contact count, use <code>contactcount</code> . For a response type, use <code>responsecount_&lt;ResponseTypeName&gt;</code> .
type	This value should always be <code>number</code> .

## Adding data mapping files

Use a text or XML editor to create or edit a data mapping file. After you have a data mapping file, you add it to Unica Plan.

1. Select **Settings > Plan Settings**.
2. Click **Template Configuration > Data Mapping**.
3. Click **Add Data Mapping**.

The Upload Data Mapping dialog box opens.

4. Enter a name for the data mapping file.
5. Browse to the XML file that defines the data mapping.
6. Click **Continue**.

## Editing data mapping files

If you want to update a data mapping file, you must first edit the XML file, and then reload it back into Unica Plan.

1. Open the data mapping XML file in a text editor and make your changes.
2. Select **Settings > Unica Plan Settings**.
3. Click **Template Configuration > Data Mapping**.
4. Click the file name that you are updating.

The **Update Data Mapping** dialog opens.

5. Select **File**, and browse to the XML file.
6. Click **Continue**.

You are prompted to overwrite the existing file.

7. Click **Save** to overwrite the existing file with the newer version.

## Data Mapping Definitions

The **Data Mapping Definitions** page maps data between campaign projects in Unica Plan and campaigns in Unica Campaign. Use the **Data Mapping** link on the **Template Configuration** page to configure data mapping.

The **Data Mapping Definitions** page contains the following columns:

Column	Description
Name	The name of the data mapping file.
Type	<p><b>Campaign Metrics Import:</b> Maps Unica Plan project metrics to Unica Campaign contact and response counts.</p> <p>If you have map files from previous versions, you might see other values in the Type column.</p>
Used By	A list of templates that use the data map.



**Note:** You cannot create a map file within Unica Plan. Use a text or XML editor to create and edit the necessary map files.

## Unica Campaign project templates

If Unica Plan is integrated with Unica Campaign, campaign project templates guide users in creating a campaign project. Campaign projects integrate the planning and project management features of Unica Plan with the campaign development features of Unica Campaign.

You indicate that a template is a campaign project template when you create the project template. In integrated systems, all new project templates include a Campaign tab on which you complete the options on the Campaign tab for the template. Then, you must specify a Target Cell Spreadsheet. If you want to import Unica Campaign contact and response metrics, you must specify a metric map file.

## Creating campaign project templates

In integrated Unica Plan and Unica Campaign, you use campaign projects to access Unica Campaign information within Unica Plan.

Before you can create a campaign project template, you must create the TCS® form. If you want to include custom campaign attributes or a metric map file in the template, create them before you create the template.

1. Select **Settings > Plan Settings**.
2. Under Other Options, click **Template Configuration > Templates**.
3. In the **Project Templates** section, click **Add Template**.
4. Complete the **Properties** tab and click **Save Changes**.
5. Click the **Campaign** tab and select the **Campaign Project Template** check box.
6. Complete the remaining fields on the **Campaign** tab and click **Save Changes**.

If you want to require TCS® approval, select the **Approval Required** check box. See [TCS approval \(on page 64\)](#).

7. Complete the remaining tabs, saving each one.

For more information about these tabs and template creation, read about building or editing a template in the *Unica Plan Administrator's Guide*.

The template displays in the list of project templates on the **Templates** page.

8. Click **Enabled** in the row for the template to make it available to users when they create projects.

## Project template Campaign tab for communicating with Unica Campaign

Use this tab to configure communication from Unica Plan to Unica Campaign if integration is enabled.



**Note:** After a user creates a project from a template, you cannot change a non-campaign template to a campaign template or vice versa: The **Campaign Project template** option on this tab is disabled.

After a campaign template is used to create a project, the only option on this tab that can be changed is the **Metric Data Mapping** setting. To change any of the other options, you must first delete all of the projects that were created from this template.

The Campaign tab contains the following settings.

**Table 7. Fields on the Campaign tab for project templates**

Field	Description
Campaign Project template	Select this check box to mark this template as a campaign project template and display the other Campaign Integration fields.
TCS® Form	Select the form that contains the Target Cell Spreadsheet to use for projects that are created from this template. The drop-down list contains all published forms that contain a TCS®.

**Table 7. Fields on the Campaign tab for project templates (continued)**

Field	Description
Metric Data Mapping	XML file that contains the data map for sending metrics from an Unica Campaign campaign to an Unica Plan project for reporting purposes.
TCS® Form Display Name	The name to display for the selected form on the TCS® tab.
Partition ID	<p>Identifies the partition of the Unica Campaign instance in which to create the campaigns that correspond to the campaign projects created from this template.</p> <p>The default value is <b>partition1</b>, which is correct if Unica Campaign is installed to a single partition. If Unica Campaign is installed on multiple partitions, you can specify the partition to use for creating campaigns.</p> <p>You can specify any Unica Plan partition. Make sure that you specify a partition to which you have access and for which integration is enabled.</p> <p>For more information about setting up Unica Campaign partitions, the Unica Campaign Installation Guide.</p>
Show TCS® tab in request	Select the check box to display the TCS® when the template is used to request a project. If the check box is clear, the TCS® displays only in campaign projects and not in requests.
Approval Required	<p>Select the check box to require approval for all the target cells that are created in the template. If cleared, the TCS® grid does not show the <b>approval</b> column or <b>approve all</b> and <b>deny all</b>.</p> <p> <b>Note:</b> As part of the upgrade to version 8.2, <b>Approval Required</b> is cleared for all upgraded campaign templates.</p>

**Table 7. Fields on the Campaign tab for project templates (continued)**

Field	Description
	For more information, see <a href="#">TCS approval (on page 64)</a> .
Copy project attributes to campaign attributes	Select the check box to automatically copy project information to campaign when users click <b>Finish</b> to create campaign projects. If this check box is not selected, users can click the <b>Copy project attributes to campaign attributes</b> link to copy the data when they create a campaign project instance. By default, the check box is not selected.

## Copying information automatically from Unica Plan to Unica Campaign

You can configure campaign project templates that automatically copy project information from projects to campaigns. You can automatically copy the description, Start date, and End date so you do not need to enter this information twice.

When you create a campaign project template, select the **Copy project attributes to campaign attributes** option to automatically copy project attributes to campaign.

If the **Copy project attributes to campaign attributes** option is not selected, you can still copy the information with one click in the object instance. When you create instances from templates without selecting the option, the **Copy project attributes to campaign attributes** link copies project attributes to campaign.

1. Create an instance of the campaign project.
2. Complete the project information: the description, Start and End Dates, and the Security policy.
3. If not already selected, click **Copy project attributes to campaign attributes**.
4. Click **Finish** or **Next**.

The campaign attributes are automatically filled with the corresponding project attribute values.

## Unica Plan and Unica Campaign Integration reports package

The Unica Plan and Unica Campaign Integration Reports Package contains several IBM® Cognos® reports that query and display information from both the Unica Campaign system tables and the Unica Plan system tables.

This report package depends on the Unica Campaign report package because the Campaign segments of the integrated reports rely on the reporting schemas from the Unica Campaign Report Package.

### Installation prerequisites for the Integration Report Package

Before you can install the Unica Plan and Unica Campaign Integration Report Package, the following configuration steps must be completed.

- Reporting must be set up for Unica Campaign and Unica Platform. See the Reports Installation and Configuration Guide.
- Reporting must be set up for Unica Plan. See "Installing reports" in the Unica Plan Installation Guide.
- The integration of Unica Plan and Unica Campaign must be complete.

Additionally, for the sample reports from the Integration Report Package to work correctly, the following conditions must be met.

- The Unica Campaign system must have the standard custom Campaign attributes loaded.
- The Unica Plan system must have the sample templates loaded: most importantly, the sample Campaign Project template. Additionally, the Campaign Project template must use the corresponding sample Campaign Project metric file.
- The Financial Management module must be enabled on the Unica Plan system.

When these prerequisites are met, continue with the installation procedure.

### Running the installer on the IBM® Cognos® system

You can run the installer on your existing IBM® Cognos® system.

1. On the IBM® Cognos® system that runs the Cognos® Content Manager, download the Unica Plan and Unica Campaign Integration Report Package installer. Download them to the same directory to which you previously downloaded the other report package installers.
2. Run the installer. (The installer starts the subinstaller for the report package.)
3. In the first **Products** window, ensure that the report package option is selected.
4. In the **Unica Platform Database Connection** window, verify that the information about how to connect to the Unica Platform system tables is correct.
5. When the report package installer takes over and displays its installation options, select the **IBM Cognos package for [product]** option. This installation option copies the reports archive and reporting model to the Cognos® system. You import this archive manually later.

## Importing the reports folder in Cognos® Connection

The application reports are in the compressed (.zip) file that the report package installer copied to the Cognos® system. Use the guidelines in this procedure to import the archive file for reports into Cognos® Connection.

1. Go to the `IBM\ReportsPackCampaignPlan\Cognos<version-number>` directory.
2. Copy the reports archive compressed file (`Reports for Plan and Campaign.zip`) to the directory where your Cognos® deployment archives are saved. In a distributed IBM® Cognos® environment, this location is on the Content Manager system.

The default location is the deployment directory under your IBM® Cognos® installation, and it is specified in the Cognos® Configuration tool that is installed with the Cognos® Content Manager. For example: `cognos\deployment`.

3. Locate the `HCL\ReportsPackCampaignPlan\Cognos<version-number>\CampaignPlanModel` subdirectory.
4. Copy the entire subdirectory to any place on the system that is running Cognos® Framework Manager that Framework Manager has access to.
5. Open Cognos® Connection.

6. From the **Welcome** page, click **Administer Cognos Content**.

If your **Welcome** page is turned off, turn it back on in the Cognos® Connection user preferences.

7. Click the **Configuration** tab.

8. Select **Content Administration**.

9. Click the **New Import** button on the toolbar .

10. Follow these guidelines as you step through the **New Import Wizard**:

- a. Select the reports archive that you copied in the previous procedure.
- b. In the Public folders content list, select **all** the options, including the package itself (the blue folder).
- c. If you do not want users to access the package and its entries yet, select **Disable after import**. Do this step if you want to test the reports before you make them available to the application users.

## Enabling internal links in the reports

The Unica application reports have standard links. To enable the links to work properly, you must configure the IBM® Cognos® Application Firewall. You must also configure the redirect URL in the Cognos® data model for the Unica application reports.



**Note:** This step is not necessary for Unica Deliver reports.

To configure the redirect URL in the Cognos® data model for the Unica application reports, complete the following steps.

1. In Cognos® Framework Manager, browse to the *<productName>Model* subdirectory that you copied into the Framework Manager directory structure. Select the .cpf file, for example *CampaignModel.cpf*.
2. Select **Parameter Maps > Environment**.
3. Right-click **Environment** and select **Edit Definition**.
4. In the **Redirect URL** section, select the **Value** field. Edit the server name and port number so they are correct for the Unica suite but leave the rest of the URL intact. By convention, the host name includes the domain name.

For example, for Unica Campaign:

```
http://serverX.ABCompany.com:7001/Campaign/  
redirectToSummary.do?external=true&
```

For example, for Unica Plan:

```
http://serverX.ABCompany.com:7001/plan/callback.jsp?
```

5. Save the model and publish the package by completing the following steps:
  - a. From the navigation tree, expand the **Packages** node of the model.
  - b. Right-click the package instance and select **Publish Package**.

## Verifying data source names and publishing

The name that is specified as the data source for the reports in the model must match the name of the data source that you created in Cognos® Connection. Before you publish the model from Framework Manager to the Cognos® content store, you must verify that the data source names match.

If you used the default data source names, the data source names match. If you did not use default data source names, you must change the data source names in the model.

To verify and change the data source names in the model, complete the following steps.

1. In Cognos® Connection, determine the names of the data sources you created.
2. In Framework Manager, select **Open a Project**.
3. Browse to the *<productName>Model* subdirectory you copied into the Framework Manager directory structure. Select the .cpf file, for example *CampaignModel.cpf*.
4. Expand the **Data Sources** entry and examine the names of the data sources. Verify that they match what you named them in Cognos® Connection.
5. If the names do not match, select the data source instance and edit the name in the **Properties** section. Save your changes.
6. Publish the package to the Cognos® content store.

## Configuring IBM Cognos® Application Firewall for Unica

IBM Cognos® Application Firewall analyzes and validates requests before the requests are processed by IBM Cognos® servers.

To configure the IBM Cognos® Application Firewall for Unica, you must specify the Unica system as a valid domain or host.

To configure IBM Cognos® Application Firewall for Unica, complete the following steps.

1. In the **Cognos Configuration** window, select **Security > IBM Cognos Application Firewall**.
2. In the **Valid domains or hosts property** window, enter the fully qualified computer host name that includes the domain and the port for the computer where Unica Platform is running.

For example:

```
serverXYZ.mycompany.com:7001
```



**Important:** In a distributed environment, you must complete this step for every computer on which an Unica application that provides Cognos® reports is installed, such as Unica Platform, Unica Campaign, and Unica Plan.

3. Save the configuration.
4. Restart the IBM Cognos® service.

## Creating Cognos® data sources for Unica application databases

The Cognos® applications need their own data sources that identify the source of the data for Unica application reports.

The Cognos® data models that are provided in the Unica reports packages are configured to use the data source names that are given in the following table:

**Table 8. Cognos® data sources**

This two-columned table provides information about the Unica application in one column, and the Cognos® data source names in the second column.

Unica application	Cognos® data source names
Unica Campaign	<code>CampaignDS</code>
Unica Deliver	<code>DeliverTrackDS</code>
Unica Interact	<ul style="list-style-type: none"> <li>• For the design time database: <code>InteractDTDS</code></li> <li>• For the runtime database: <code>InteractRTDS</code></li> <li>• For the learning database: <code>InteractLearning-DS</code></li> <li>• For the ETL database: <code>InteractETLDS</code></li> </ul>
Unica Plan	<code>PlanDS</code>
Unica Collaborate	<ul style="list-style-type: none"> <li>• For the Unica Collaborate database: <code>CollaborateDS</code></li> <li>• For the customer database: <code>CustomerDS</code></li> <li>• For the Unica Campaign database: <code>CampaignDS</code></li> </ul>

Use the following guidelines to create Cognos® data sources for the HCL application databases.

- Use the Administration section of Cognos® Connection.
- Use the default data source names that are shown in the Cognos® data sources table to avoid having to alter the data model.
- The database type that you select must match that of the HCL application database. Use the Cognos® documentation to determine how to fill database-specific fields.



**Note:** For Unica Campaign and Unica Deliver, the appropriate database is Unica Campaign.

- Be sure that you identify the Unica application database and not the Cognos® content store.
- When you configure the **Signon** section, select the **Password** and **Create a Signon that the Everyone group can use** options.
- In the **Signon** section, specify the user credentials for the Unica application database user.
- Consult the Cognos® data sources table and ensure that you create all the data sources that are required by the data model for the reports you are configuring. For example, the reporting data for Unica Interact is in three databases, so you must create separate Cognos® data sources for each database.
- If the Unica Campaign system has more than one partition, create separate data sources for each partition.  
For example, if Unica Campaign and Unica Deliver are configured for multiple partitions, create a separate Unica Campaign and Unica Deliver data source for each partition.
- Verify that you configured each data source correctly by using the **Test Connection** feature.

## Creating a campaign in an integrated environment

The workflow for creating a campaign when Unica Plan and Unica Campaign are integrated consists of the following tasks.

In many organizations, the tasks that are required to create a marketing campaign are shared by multiple people.

1. Using the appropriate template, create a campaign project.

Depending on your permissions, you can create the project directly or request a project and wait for it to be accepted.

2. Complete any information that is missing on the project tabs.
3. Create the linked campaign for the project.

After this step is completed, the **Implementation/Planning** button () appears, so you can go back and forth between campaign project and its linked campaign.

4. Complete the TCS® to define the control and target cells for the campaign and the assigned offers for target cells.
5. Publish the TCS® to Unica Campaign.
6. Create the flowcharts for the campaign, linking cells that are created in the flowchart with the appropriate target and control cells that are defined in the TCS®.
7. **Optional:** If TCS® approval is required, test the flowchart to generate cell counts.
8. **Optional:** If TCS® approval is required, update the cell status from within the TCS® for review.
9. **Optional:** If TCS® approval is required and when all information for a cell (for example, the count) is appropriate, approve that cell (row) in the TCS®.
10. **Optional:** If TCS® approval is required, repeat the process of publishing the TCS® and updating cell status until all cells in use by the flowchart is approved.
11. When all necessary TCS® rows for the flowchart to run are prepared, publish the TCS® a final time.
12. **Optional:** If flowchart approval is required, an approval must be created and assigned to one or more approvers. A flowchart can only be allowed to run when the approval is in completed or canceled state.
13. Start the production flowchart run for the campaign.

## Unica Campaign projects in an integrated system

If your Unica Plan system is integrated with Unica Campaign, you can create campaign projects.

A campaign project collects the information that is related to developing a marketing campaign and running it through Unica Campaign.

A campaign project can contain any features available to projects, including subprojects. Campaign projects also contain a TCS® tab with a Target Cell Spreadsheet and an additional Campaign Summary section of the Summary tab.

In a campaign project, you synchronize the campaign, offer, contact history, and response history data for the project with Unica Campaign.

In a campaign project workflow you can create flowchart approval tasks. When such approval are created, the Flowchart will not run until all related approvals are in completed or canceled state.

## Project codes and campaign codes

When you create a campaign project, you must specify a project name and code. The same name and code are used as the campaign name and code when you click the **Create Linked Campaign** icon to create the campaign in Unica Campaign.

The code must be unique in both Unica Plan and Unica Campaign. If you change the code, the system checks the uniqueness of the code before it creates or saves the project.

## Creating projects

You can create a single project from a project template. Your administrator sets up and maintains project templates. You can also create projects by copying a project, making up to 99 clones of a project, or responding to a project request.

When you create a project, note the following behavior.

- To create a project, you must have the appropriate security permission.
- When you create a project, you are the owner of the project.
- You can add other team members to the project, some of whom can also be project owners.

1. Select **Operations > Projects**.

2. Click **Add Project** ().



**Note:** Ensure that you do not use the following invalid characters (%?|:,<>&\/"\$<tab>)\* under the Project name. These special characters are not supported for the Project Name field. Although these characters are allowed in project name while Campaign is integrated, but you must not use these characters.

3. Select a template for your project.

An Unica Plan administrator sets up the templates for your organization. To access any of the Unica Plan and Unica Campaign integration features, you must select a template that is configured as a campaign project template. The template selected here will reflect in the **Operations > Approvals** page in the **All approvals > My active approvals**. The template name is thus indicative of the project template the approval belongs to.

4. Click **Continue**.
5. Use the Add Project wizard to supply values for the project fields.
6. When you save the project, the system verifies that all required fields have a value. It also completes optional fields by supplying default values from the template when available. To save your project, use one of the following options.
  - Click **Finish**. The Summary tab displays for the new project.
  - Click **Save and Duplicate**. The system saves the initial project and then uses the same information to create another project. The Summary tab displays for the duplicate project. You can edit the default name for the duplicate project and for other fields as needed, then save that project as well.
  - Click **Save and Return to List** on any page. The **All Projects and Requests** page displays.

Newly created projects are given a status of Not Started. To use the project to collect and share information, you change its status. See [Starting projects \(on page 48\)](#).

The tabs in a project differ depending on the template you used. A typical project contains the following tabs:

- Summary
- People
- Strategy
- Workflow (schedule of tasks, milestones, and approvals)
- Tracking (expenses and resources)
- Health Status (project monitoring)
- Attachments

When Unica Campaign is integrated with Unica Plan, a campaign project also contains a Target Cell Spreadsheet tab.

Some selections in the Add Project wizard also affect the tab content in the project. If your administrator configured workflow template branching, your field options might include a specific template for the **Workflow** tab. For example, the template might use a different workflow for a project that is based on whether you selected direct mail or email as the channel.

## Starting projects

You start a project by changing the status. Select the transition Start Project.

You can start any project that you own:

- The projects that you create
- The projects that you create when you accept a project request
- The projects that include you as an owner

You can also start several projects at the same time. For more information, see [Changing the status of multiple projects or requests \(on page 51\)](#).

1. Go to the **Summary** tab of the project you want to start.  
Select **Operations > Projects**. Click the **Actions** icon and select a view, such as **My Projects**, that includes projects with a "Not Started" status.
2. Click **Change Status** and select **Start Project** or **Start Project with comments** from the menu.
3. **Optional:** If you chose **Start Project with comments**, type your comments and click **Continue**.

The project status changes to "In Progress". After you start a project, all project participants can work with their assigned tasks.

## Campaign Summary section

The Campaign Summary section of the project Summary tab defines basic information about the campaign for this project.

<b>Field</b>	<b>Description</b>
Campaign Description	Enter a description of the campaign.
Campaign Start Date	<p>Date on which the campaign starts</p> <p>You can manually enter the date or click the drop-down arrow to display a calendar from which you can select a date. If the field contains a date, you can click the forward or back arrows to change the date.</p> <p>You cannot create the linked campaign if this field is empty.</p>
Campaign End Date	<p>Date on which the campaign ends</p> <p>You can manually enter the date or click the drop-down arrow to display a calendar from which you can select a date. If the field contains a date, you can click the forward or back arrows to change the date.</p> <p>You cannot create the linked campaign if this field is empty.</p>
Campaign Objective	Enter the objectives of the campaign.
Campaign Initiative	Enter the initiative under which the campaign falls.
Campaign Security Policy	<p>Select a security policy from the drop-down list of all the security policies that are defined for Unica Campaign.</p> <p>You can select any policy, even policies in which you do not have a role. If you put a campaign into the wrong policy, it is not visible to the applicable users.</p>

Field	Description
	You cannot create the linked campaign if there is no security policy specified.

## Creating requests

If you do not have permission to create a project, you create a project request.

When you create a project request, note the following behavior:

- You must create the request and then submit it.
- You must have the appropriate security permission.
- After the recipient accepts the request, the recipient owns the project. (You are the requester.)

When you create a request, the pages in the wizard that you complete differ depending on the type of project you want to create. A typical request contains the following sections:

- Summary information about the request
- Tracking information
- Attachments that are part of the request

1. Select **Operations > Projects**.

2. Click **Add Request** ().

The **Add Request** dialog opens.

3. Select a template for your request.

Your administrator sets up project templates that correspond to the types of projects that your organization undertakes. To request a project that uses Unica Plan-Unica Campaign integration features, you must select a campaign project template.

4. Click **Continue**.

5. Use the Add Project wizard to supply values for the project fields.

Each request identifies recipients to review and redraft or approve the request. If the template you selected allows these modifications, you can also:

- Add recipients.
  - Change recipient roles.
  - Change the duration periods for responses.
  - Change the sequence numbers that order request receipt and approval.
  - Specify whether a response is required.
6. When you save the request, the system verifies that all required fields have a value. It also completes optional fields by supplying default values from the template when available. To save your request, use one of the following options:
- Click **Finish**.
  - Click **Save and Duplicate**. The system saves the initial request and then uses the same information to create another request. The Summary tab displays for the duplicate request: edit the default name that is supplied for the duplicate and other fields as needed, then save that request as well.
  - Click **Save and Return to List** on any page.
7. Submit the request to the first reviewer.
- If you created a single request, on the **Summary** tab, click **Change Status** and select **Submit Request**.
  - If you created multiple requests, submit them as described in [Changing the status of multiple projects or requests \(on page 51\)](#).

You cannot change the request after the first reviewer approves the project request. If you need to change a request after the first reviewer approves the project, you should change the project status to draft and resubmit the project after you make your changes.

When the last required recipient approves the request, Unica Plan creates the project.

## Changing the status of multiple projects or requests

You can change the status of one or more projects or requests simultaneously to improve efficiency.

Your change must meet the following prerequisites; if it does not, a warning message describes the possible problems.

- The new status that you select must be valid for every item that you select.
- To make status changes, you must have appropriate permissions.
- To accept or reject requests, you must be an approver for every item you select.

Your administrator can set up Unica Plan to send an alert to owners and members of a process when its status changes.

1. Select **Operations > Projects**.
2. Click **Actions** (  ) and select **All Projects and Requests**.
3. Select one or more items.



**Note:** You can select items on more than one page. However, the system applies the status change only to the page you are viewing when you select the new status.

4. Click **Change Status** and select a status from the menu to apply to all of the selected items.

You can make most status changes with or without comments.

- If you chose a new status without comments, Unica Plan changes the status immediately when you click the new status.
- If you chose a new status with comments, type your comments and click **Continue** to apply the new status.

## Special characters in Unica Campaign object names

Some special characters are not supported in any Unica Campaign object names. In addition, some objects have specific naming restrictions.



**Note:** If you pass object names to your database (for example, if you use a user variable that contains a flowchart name), you must ensure that the object name contains only characters supported by your particular database. Otherwise, you will receive a database error.

## Creating a linked campaign

You must specify the campaign start date, campaign end date, and campaign security policy in a campaign project before you can create the linked campaign for the project.

You must have the Create Campaign permission in Unica Campaign to create the linked campaign.



**Note:** All campaigns that are linked to Unica Plan projects are created in the root folder.

The user who clicks the **Create Linked Campaign** icon automatically becomes the owner of the campaign in Unica Campaign. You cannot change campaign ownership. Ownership might grant specific permissions, depending on the security configuration setup in Unica Campaign.

To create a linked campaign, complete the following steps.

1. Select **Operations > Projects**.
2. Click the project for which you want to create the campaign.  
The project Summary tab displays.

3. Click the **Create Linked Campaign** icon () in the left toolbar.

The campaign is created in Unica Campaign and any shared information (except information in the TCS®) is automatically published to Unica Campaign.

The **Create Linked Campaign** icon changes to the **Update Campaign** icon () after the campaign is created. The **Implementation/Planning** button () appears to the right of the project tabs. Click it to navigate to the campaign and click it again to return to the project.

## Updating a linked campaign

You must update a linked campaign any time you change the value for a field outside of the TCS®.

You must have the Edit Campaign permission in Unica Campaign to update the campaign.

When you change the value for a field, outside of the TCS®, whose data gets passed to Unica Campaign, you must update the linked campaign. By default, these fields are in the **Campaign Summary** section of the project **Summary** tab. Your template creator might have created other fields on other tabs whose data also is passed to Unica Campaign. When in doubt, consult your template creator.



**Note:** Data in the TCS® gets sent to Unica Campaign when you publish the TCS®.

To update a linked campaign, complete the following steps.

1. Open the campaign project for the linked campaign.
2. On the **Summary** tab, click the **Update Campaign** icon (  ).

## The Target Cell Spreadsheet

You define all of the target and control cells for your campaign and assign offers in the Target Cell Spreadsheet. Your TCS® must contain all cell definitions for your entire campaign.

Multiple flowcharts in a campaign can link to cells in the TCS®, but each TCS® row can only be linked to only one flowchart cell. For example, you might have cells that are defined for wave one of a campaign that is delivered through email and different cells that are defined for wave two delivered through the call center. Wave one and wave two might be implemented in different flowcharts but the cells can share attribute values (for example, cell code) if they represent the same group of audience IDs in both flowcharts.

Each row must have values in the **Cell Name** and **Is Control Cell** columns or the row are not saved. If you do not provide a cell code, one is automatically generated when you publish the TCS®. If you provide a code, it must meet the cell code format requirements that are configured in Unica Campaign. If the **allowDuplicateCellCodes** configuration parameter is set to `FALSE`, cell codes must be unique within a flowchart. If you delete the cell code for a row in the TCS® and republish the TCS®, Unica Campaign creates a cell code for the row. Any existing link between that cell and a flowchart persists.

The TCS® is an editable grid, so you enter data in it just as you would in any other editable grid. You can copy and paste TCS® rows.

Additions or changes you make to the TCS® are not visible in Unica Campaign until you click **Publish** on the TCS®.

If you delete a row that is linked to a flowchart cell and republish the TCS®, any flowchart cell that is linked to that TCS® row becomes unlinked, although no data is lost. If that cell is input to a contact process (a Call List, Mail List, or Optimize process box), you must link the flowchart cell to another TCS® row before you can run the flowchart in production mode.



**Note:** The value of the control cell cannot be copied after the request is accepted,.

Consider the following points when Offer Integration is enabled with Plan.

- You can assign a published offer to the Mail List or Optimize process box by using match and link cells.
- After the offer is assigned, you cannot change it manually from the process box. If any changes are made to the offer from Plan, the changes are reflected in the process box only after the cells are unlinked and then linked again.

## Grid edit mode

When you work with grids in edit mode, you can add rows, delete rows, and edit existing data. In a single editing session, you can do all of these tasks if you have the appropriate permissions.

### Permissions

You must have the following permissions to work with grids. Ask your administrator if you need help.

- To add a row, you must have the View Tab, Edit Tab, Edit Grid, and Add Grid Row permissions for the tab with the grid.
- To edit a row, you must have the View Tab, Edit Tab, and Edit Grid permissions for the tab with the grid.
- To copy and paste a row, you must have the View Tab, Edit Tab, and Edit Grid permissions for the tab with the grid.
- To delete a row, you must have the View Tab, Edit Tab, Edit Grid Row, and Delete Grid row permissions for the tab with the grid.

## Locked data

The system prevents you from editing a row that is being edited by another user. For a Target Cell Spreadsheet in a campaign project, the entire grid is locked for editing instead of individual grid rows.

## Revision history

Unica Plan maintains an audit log for grids. The audit log contains the user details and the time it was saved. This information is available on the Analysis tab.

## Adding grid rows

You can add one or more rows of grid data during an editing session.

To add a row, you must have the **View Tab**, **Edit Tab**, and **Add grid row** permissions for the tab with the grid.

Ensure that all required columns are visible in your current grid view. Otherwise, you receive an error when you try to save new rows.

Note the following behavior:

- After you add a row, Unica Plan warns you if you leave the page without saving your work.
- All the cells of newly added rows are either blank or filled with default data as specified during the form definition.

- If you select multiple rows before you add a row, the new row is added after the selected block.
- If you add multiple rows before saving, all new rows must pass validation, or none of the new rows are saved.
- If you hide a required column while you are adding data, you receive an error when you attempt to save. You must make all required columns visible, and then retry to add your data.
- When you save the new data, the position of newly added rows might change; the order of rows depends on the sort column for the grid.

To add a row to the grid, complete the following steps.

1. Navigate to the grid you want to update.
2. Click **Edit**.
3. Select the row above the location for your new row and click **Add Row**.

Unica Plan adds a row below the selected row.



**Note:** If you do not select a row, the new row is appended to end of the current page.

4. Click an empty field in the new row and enter or select values.
5. Click **Save**.

## Editing grid rows

You can edit one or more rows of grid data during an editing session.

To edit a row, you must have the **View Tab**, **Edit Tab**, and **Edit grid row** permissions for the tab with the grid.



**Note:** You cannot edit any rows that are in use by another user.

To edit a grid row, complete the following steps.

1. Navigate to the grid you want to update.
2. Click **Edit** to change from view mode to edit mode.
3. Navigate to the page that contains the data to edit, then double-click in any field to change its value.

An editor appears for the specific data type of the selected field. For example, if you select a date field, the date picker displays.

4. Click **Save** to save your work and return to view mode.

## Deleting grid rows

You can delete one or more rows of grid data during an editing session.

To delete a row, you must have the **View Tab**, **Edit Tab**, and **Delete grid row** permissions for the tab with the grid.

Before you can delete a row permanently, the system prompts you to confirm your selections.



**Note:** You cannot delete any rows that are in use by another user.

To delete a grid row, complete the following steps.

1. Navigate to the grid that contains the data that you want to delete.
2. Select one or more rows to delete and click the delete icon.

A message that describes the rows that are marked for deletion appears.

3. Repeat step 2 until all rows you want to delete are marked.
4. Click **Save** to remove the rows you marked for deletion.

Any selected rows that are not in use are deleted.

## Publishing the TCS®

To make the cell definitions and offer assignments in the TCS® available to Unica Campaign, you must publish the TCS®. Anytime you make updates to data in the TCS®, you must publish the TCS® again to make those changes visible to Unica Campaign.

To publish the TCS®, you must have the **Manage Campaign Target Cells** permission in Unica Campaign.

Every row must have a value for the **Cell Name** and **Is Control Cell?** columns before you publish the TCS®. If the TCS® contains unpublished data, the **Publish** button label is red.

A flowchart cannot link any cells to the TCS® rows until the TCS® is published. Although publishing the TCS® makes the data available to the flowchart in Unica Campaign, you cannot start a production run of a flowchart until all linked rows in the TCS® are approved. You can start a test run of a flowchart at any time.

If the data in the TCS® changes, you must publish the TCS® again to update the data available to Unica Campaign.

If the TCS® contains data that has not been published, the **Publish** button label is red.

To publish the TCS®, complete the following steps.

1. Open the project that contains the TCS®.
2. Click the **Target Cell Spreadsheet** tab.
3. Click **Publish**.

## Accessing a campaign in Unica Campaign

You can access a linked campaign from Unica Plan.

The **Implementation** button displays only if the linked campaign for the project exists.

To access a campaign in Unica Campaign, complete the following steps.

1. Open the corresponding campaign project in Unica Plan.
2. Click the **Implementation** button () to the right of the Analysis tab.

## Updating cell status data in the TCS®

Updating the cell status imports the run results for the cells in the TCS® from Unica Campaign into Unica Plan. When you update the cell status, Unica Plan imports the latest run results. The results of previous runs are irretrievably lost.

You can update cell status only if one or more cells are linked to a flowchart.

You must have the **Manage Campaign target cells** permission in Unica Campaign to update the cell status.

When you update the cell status, Unica Plan places the imported information in the following read-only fields of the TCS®:

**Table 9. Updates made on cell status change**

Field	Description
Flowchart	Name of the flowchart in which the cell is used.
Last Run	Date and time of the last run for the flowchart that contains this cell.
Actual Count	Number of unique audience IDs in the cell during the last run.
Run Type	Run type for the last run of the flowchart that contains this cell (production or test; flowchart, branch, or process box).

To update the cell status data in the TCS®, complete the following steps.

1. Open the project whose cell count data you want to update.
2. Click the **Target Cell Spreadsheet** tab.
3. Click **Get cell status**.

## Managing flowcharts

Unica Campaign flowcharts define the campaign logic. Each flowchart in a campaign performs a sequence of actions on data that is stored in your customer databases or flat files.

During and after creating flowcharts, you can perform various management activities on them. For example, you can test and run flowcharts, edit them, print them, and so on.



**Note:** To work with flowcharts, you must have the appropriate permissions assigned by an administrator.

## More information

There are restrictions in the use of special characters in flowchart names. For details, see Appendix A of the Unica Campaign User's Guide.

## Creating flowcharts

You can add a flowchart to your campaign either by creating a new one, or copying an existing one.

Copying an existing flowchart may save time because you can start with a completed flowchart and modify it to meet your needs.

To facilitate constructing flowcharts, you can use pre-configured flowchart templates to quickly create common campaign logic or process box sequences. You can also save and reuse other objects such as queries, table catalogs, triggers, custom macros, user variables, and definitions of derived fields.

## Create flowcharts

Follow these instructions to add a flowchart to a marketing campaign. A flowchart determines the campaign logic.

Each marketing campaign consists of at least one flowchart. A typical campaign has a flowchart that selects customers or prospects who will receive offers and a separate flowchart that tracks responses.

For example, a contact flowchart might select a set of customers that will be contacted by phone or email. Another flowchart in the same campaign tracks responses to those offers. After the offers are made, you use the response flowchart to record and analyze responses. You can add multiple flowcharts to a campaign as you analyze and refine your results. More complex campaigns can include many flowcharts to manage multiple offer streams.

Each flowchart is made up of processes. You configure and then connect processes to perform data manipulation, create contact lists, and record contact and response tracking for your campaign. By connecting a series of processes in a flowchart, then running that flowchart, you define and implement your campaign.

For example, a flowchart might include a Select process, which is connected to a Segment process, which is connected to a Call List process. The Select process can be configured to select all customers from your database who live in the northeast. The Segment process can segment those customers into value tiers, such as Gold, Silver, Bronze. The Call List process assigns offers, generates a contact list for a telemarketing campaign, and records the results in the contact history.

The following procedure provides a quick overview of how to create a new flowchart and add it to a campaign or a session. (Alternatively, you can copy an existing flowchart. You can also use the template library to copy configured processes from one flowchart to another.)



**Note:** If you are creating an interactive flowchart, see the Unica Interact documentation for information.

1. Open a campaign or session.
2. Click **Add flowchart**

The **Flowchart properties** page opens.

3. Enter a flowchart name (required) and description (optional). For **Flowchart type**, **Standard batch flowchart** is the only option unless you are a licensed user of Unica Interact. If you installed a licensed version of Unica Interact, you can select **Interactive flowchart**.



**Note:** Flowchart names have specific character restrictions. See Special characters not supported (*on page* ).

4. Click **Save and edit flowchart**.

The flowchart window opens. You see the process palette on the left, a toolbar at the top, and a blank flowchart workspace.

5. Add a process to your flowchart by dragging a process box from the palette to the workspace.

A flowchart typically begins with one or more Select or Audience processes to define the customers or other marketable entities with which to work.

6. Double-click a process in the workspace or right-click the process and choose **Process configuration**. Then use the configuration dialog to specify how the process operates.
7. Connect the configured processes to determine the workflow of your campaign.
8. Use **Save and continue**  frequently while you work.
9. When you are done, open the **Save options** menu and choose **Save and exit** .

## Test runs for flowcharts

You can conduct a test run on a flowchart or branch if you do not want to output data or update any tables or files.

When you conduct a test run on a flowchart or a branch, be aware of the following.

- Triggers run on completion of both test and production runs.
- Global suppression is applied when testing processes, branches, or flowcharts.
- The option **Advanced Settings > Test Run Settings > Enable Output** determines whether output is generated during test runs.

Conduct test runs on processes and branches as you are building flowcharts, so that you can troubleshoot errors as they occur. Remember to save each flowchart before you run or test it.

## Doing a test run of a process, branch, or flowchart

Conduct test runs as you build a flowchart so that you can troubleshoot errors as they occur. You can then view a report of any errors in the flowchart.

Always save an edited flowchart before you do a test run. When you do a test run, be aware of the following:

- Test runs do not update any tables or files. However, triggers run on completion of test runs and global suppression is applied.
- The option **Advanced settings > Test run settings > Enable output** determines whether output is generated during test runs.
- When you test run a data manipulation process (Select, Merge, Extract, Audience), you can limit the number of records. Use the **Limit output cell size** option on the Cell Size Limit tab in the process configuration dialog.
- Results from a previous test run are lost.
- If a process requires data from an upstream process, you might have to run the upstream process first so that its data is available to the downstream process.

1. Open a flowchart in **Edit** mode.
2. To test run a process or branch, right-click a process, open the **Run** menu  and select **Test run selected process** or **Test run selected branch**.
3. To test run the entire flowchart, open the **Run** menu  in the toolbar and select **Test run flowchart**.

The process, branch, or flowchart runs in test mode. Each process that runs successfully displays a green check mark. If there are errors, the process displays a red "X".

4. If you want to pause or stop the run, right-click a process box and select **Pause** or **Stop** from the **Run** menu.
5. Use one of the **Save** options in the toolbar. If you click **Save and exit** before the flowchart finishes the test run, the flowchart continues to run and is saved when it finishes. If anyone reopens the flowchart while it is still running, any changes made to the flowchart are lost. For this reason, always save a flowchart before you run it.
6. To determine if there were any errors in the run, click the **Analysis** tab and view the **Campaign flowchart status summary** report.

## TCS® approval

In integrated Unica Plan and Unica Campaign systems, campaign project templates can require (target cell spreadsheet) TCS® approval before flowcharts run in production mode. If **Approval Required** is selected on the template, then all rows of the TCS® must to be

approved before the flowchart can run in production mode. If you run the flowchart in production mode and one or more rows on the TCS® associated with this flowchart are not approved, Unica Campaign generates an error.

If the project was created from a template on which the **Approval Required** check box is not selected, then approval is not required for top-down cells in the TCS®. In this case, the TCS® grid does not show the **approval** column or **approve all** and **deny all**. Leaving the approval required check box cleared saves time if campaigns do not require TCS® approval.



**Note:** By default, **Approval Required** is cleared. However, after you upgrade to Unica Plan 8.5, all upgraded campaign templates have **Approval Required** checked.

## Import and export

If **Approval Required** is selected, the **is approved** column is included when you export the project.

If **Approval Required** is cleared, the **is approved** column does not export, and only CSV files that match are imported.

## Approving an individual TCS® row

You can approve each row of the TCS® individually. You can approve rows as soon as they are complete and correct, even if other rows on the TCS® are not yet ready to be approved.

To approve an individual row of the TCS®, complete the following steps.

1. Open the project that contains the TCS®.
2. Click the **Target Cell Spreadsheet** tab.
3. Click the **Edit** icon.
4. Double-click the **Is Approved** column for the row you want to approve.

The **No/Yes** drop-down list displays.

5. Click **Yes**.
6. When you are through editing the TCS®, click the **Save and Exit** icon.

## Approving all rows of the TCS®

If the template is set to **Approval Required**, then you must approve all rows of the TCS® before you run the flowchart in production mode.

To approve all rows of the TCS®, complete the following steps.

1. Open the project that contains the TCS®.
2. Click the **Target Cell Spreadsheet** tab.
3. Click **Approve All**.

## Denying approval to all TCS® rows

You can deny approval to all rows of the TCS®.

To deny all rows of the TCS®, complete the following steps.

1. Open the project that contains the TCS®.
2. Click the **Target Cell Spreadsheet** tab.
3. Click **Deny All**.

## Testing and running flowcharts

You can do a test or production run on an entire flowchart, a branch, or an individual process in the flowchart. You can also validate flowcharts. For best results, conduct test runs and perform validation as you build a flowchart, so that you can troubleshoot errors as they occur. Be sure to save each flowchart before you do a test or production run and before you perform validation.



**Important:** For flowcharts that contain contact processes, each production run of a flowchart can generate contact history only once. To generate multiple contacts from the same list of IDs, snapshot out the list of IDs and read from the list for each flowchart run.



**Note:** Users with Administrative privileges can access the **Monitoring** page, which displays all running flowcharts and their status. The **Monitoring** page also provides controls to suspend, resume, or stop flowchart runs.

## Doing a production run of a flowchart

When you do a production run of a flowchart, the data that it generates is saved in system tables. After you run and save the flowchart, you can view the results of the run in reports.

Do a production run after you save, validate, and do a test run. A production run writes to the history tables.

The contact processes, such as Mail list and Call list, write entries into Contact History. Each production run can generate contact history only once. Contact processes that already ran for that production run can be rerun only if the contact history from the current run is first deleted. To generate multiple contacts from the same list of IDs, snapshot the list of IDs and read from the list for each flowchart run.

Triggers run on completion of a production run.

After initiating a run, users with Administrative privileges can access the **Monitoring** page, which displays all running flowcharts and their status.

1. Save the flowchart before you run it.
2. If any approval exists for a flowchart, the approval must be in the completed or canceled state otherwise the flowchart will not run.
3. If you are viewing a flowchart, open the **Run** menu  and select **Run**.

If you are editing a flowchart, open the **Run** menu  and select **Save and run flowchart**.

4. To run a process or branch, right-click a process, open the **Run** menu  and select **Save and run selected process** or **Save and run selected branch**.



**Note:** Running only a process or a branch of a flowchart does not increment the Run ID of a flowchart. When you run only a process or a branch, if contact



history records exist, you are prompted to choose run history options before you can proceed. The **Run history options** dialog appears only when you run a branch or process that previously generated contact history for the current Run ID. You can either append information to contact history or replace existing contact history for the Run ID.

5. To run the entire flowchart, open the **Run** menu  in the toolbar and select **Save and run flowchart**.

If the flowchart has already run, you are asked to confirm the run.

The process, branch, or flowchart runs in production mode. Data from the run is saved to the appropriate system tables. Each process that runs successfully displays a green check mark. If there are errors, the process displays a red "X".

6. If you want to pause or stop the run, right-click a process box, open the **Run** menu and select **Pause** or **Stop**.
7. Use one of the **Save** options in the toolbar. If you click **Save and exit** before the flowchart finishes the run, the flowchart continues to run and is saved when it finishes. If anyone reopens the flowchart while it is still running, any changes made to the flowchart are lost.

You must save the flowchart after it runs to view the results of the run in any reports. After you save the flowchart, results of repeated runs are immediately available.

8. To determine if there were any errors in the run, click the **Analysis** tab and view the **Unica Campaign flowchart status summary** report.

## Importing metrics from a campaign

If your campaign project has a **Tracking** tab, the template creator mapped contact and response metrics in Unica Campaign with metrics in Unica Plan. You can import the metric data into the campaign project.

You must have the **Analyze campaign** permission in Unica Campaign to import metrics.

To import metrics from a campaign, complete the following steps.

1. Navigate to the **Tracking** tab of the campaign project whose metrics you want to import.
2. Click **Import Values**.

The Unica Campaign metrics are displayed on the **Import Values** page. The information that is imported depends on the metrics the template creator defined. Unica Plan captures and displays the last date of import, which is shown as **External Sources Last Refreshed Date Time** at the bottom of the table.

3. Click **Save and Finish** to update the metrics on the **Tracking** tab and close the **Import Values** page.

If necessary, manually update the metrics that you imported.

## Integration reports

When the Unica Plan and Unica Campaign integration report pack is installed, the following reports are available.

**Table 10. Integration report pack reports**

Report	Description
Campaign Cell Financial Comparison	A Cognos® report that displays budget, revenue, and ROI information for each campaign and each cell within the campaign. This report requires the Unica Plan Financial Management module.
Campaign Offer by Channel Financial Comparison	A Cognos® report that displays budget, revenue, and ROI information for each campaign, each channel within the campaign, and each offer within the channel. This report requires the Unica Plan Financial Management module.
Campaign Offer Financial Comparison	A Cognos® report that displays budget, revenue, and ROI information for each campaign and each offer within the campaign. This report requires the Unica Plan Financial Management module.

## Offers and offer templates in an integrated system

If offer integration is enabled, you create offers in Unica Plan, then publish them for use in Unica Campaign. You can set up offers before they are assigned to cells in Unica Campaign. Offers are based on templates, which are also created in Unica Plan.

When offer integration is enabled:

- You can import any offers previously established in Unica Campaign into Unica Plan.
- Users create and manage offers, offer lists, and offer folders by selecting **Operations > Offers** instead of **Unica Campaign > Offers**.
- You create and manage offer attributes and offer templates by selecting **Settings > Unica Plan Settings > Template Configuration** instead of **Settings > Unica Campaign Settings > Templates and Customization** options.
- You use Unica Plan to assign offers and offer lists to output cells in the Target Cell Spreadsheet (TCS®) form of a campaign project.

## Offer workflow features

For systems that enable offer integration, several features are available when you work with offers in Unica Plan.

### Offer approvals

When you create or edit an offer, Unica Plan provides a check box to indicate offer approval. Only approved offers can be published to Unica Campaign.

### Offer states

Offers and offer folders can have the following states.

Offer state	Definition
Draft	When you create an offer, the state of the new offer is Draft.
Published	The state "Published" pushes the offer instance to Unica Campaign. The first time an offer is published in Unica Plan, the sys-

Offer state	Definition
	tem creates the offer in Unica Campaign; subsequent publishing updates the offer instance in Unica Campaign.
Redraft	After an offer is Published, it cannot be edited. To edit a published offer, the user can redraft the offer, which changes it to the Draft state. User can then edit the offer and publish changes.
Retire	Only Published offers can be Retired. After the offer is Retired, it is not available for future use and cannot be edited or changed to any other state.

### Offer codes automatically generated

In Unica Plan, the offer code that is assigned to each offer can be generated by the Default code generator. Users cannot modify the offer code generator. In the wizard mode of offer creation, the **Auto-generate on save** check box creates the offer code automatically. If the check box is selected, the offer code is generated from Unica Campaign. If the check box is not selected, validation is made for the valid offer code.

### Offer templates and integration with IBM Digital Recommendations (optional)

If your installation also uses Digital Recommendations, you can configure offer templates in Unica Plan to dynamically receive category ID and name values for specified clients.

With this configuration, to include a category in an offer, users select from a list that is populated directly from Digital Recommendations rather than entering ID numbers manually. For more information, see [Including IBM Digital Recommendations categories \(on page 20\)](#).

## Enabling offer integration in Unica Plan

When offer integration is enabled, you manage offers and offer templates in Unica Plan rather than Unica Campaign. You can enable offer integration either when you integrate Unica Plan with Unica Campaign or after you use Unica Campaign to manage offers.

Offer integration is a separate option from campaign integration. When campaign integration is enabled, you can also enable offer integration.

To enable offer integration in Unica Plan, complete the following steps.

1. Confirm that integration is enabled in Unica Plan and in each of the appropriate Unica Campaign partitions, as explained in [Configuring property settings for integrated deployment \(on page 9\)](#).
2. On the **Settings > Configuration** page, under **Unica**, click Unica Platform.
3. Click **Edit Settings** and set **Plan - Offer integration** to **True**. This setting enables the offer lifecycle management features in Unica Plan.

The system checks for compatibility issues. For example, if an attribute with the "creativeurl" internal name exists in Unica Plan, offer integration fails so that values for that existing attribute are not overwritten. Before you can proceed with offer integration, you must resolve all reported issues.

4. If your Unica Campaign installation has multiple partitions, set the following property for each partition where you want to enable offer integration.
  - a. Expand **HCL Unica > Campaign > partitions > partition[n] > server** and click **internal**.
  - b. Set **Plan - Offer integration** to **Yes**.
5. Repeat step 4 for other partitions as needed.
6. If you managed offers in Unica Campaign before you enabled offer integration, import the metadata and data for those offers into Unica Plan for each partition.

After you enable offer integration, you use Unica Plan to create, edit, and manage offers, including any offers that you created in Unica Campaign before you enabled offer integration.



**Note:** Avoid disabling offer integration after you enable it.

## Importing offers from Unica Campaign

When you enable offer integration, you can import offer metadata and data from Unica Campaign to Unica Plan.

Before you import offers, verify that every user who is referenced as an owner, modifier, or user in a Unica Campaign offer or offer list has Unica Plan privileges.

To import offer data and metadata from Unica Campaign successfully, you must have administrative privileges to both Unica Plan and Unica Campaign.



**Note:** Complete this procedure immediately after you enable offer integration, and before you create any offer-related items with Unica Plan.

Typically, you import offers from Unica Campaign only one time. If the import procedure fails, review and resolve the errors and then start the import process again. Successfully imported offers and offer lists are flagged in Unica Campaign to prevent duplicate imports. After integration, users enter all offer metadata and data with Unica Plan, so you do not need to repeat this procedure.



**Note:** Verify that the offer import procedure completes successfully.

1. Select **Settings > Plan Settings**.
2. In the **Other Options** section, click **Import Unica Campaign Offers**.

The **Import Campaign Offers** page enumerates the offer templates, offer folders, offers, and offer lists available for import.

3. Click **Continue**. The import process starts and the status displays. You can navigate to other pages and return to the **Import Campaign Offers** page to check the status and see results.



**Note:** Verify that the offer import procedure completes successfully before Unica Plan users start to work with offers.

4. In a multi-partitioned Unica Campaign environment, you repeat these steps for each partition. Log in to Unica Plan with a user ID associated with each of the other partitions and repeat this procedure.

The import process brings the offer data and metadata that exists in Unica Campaign into Unica Plan. The import process sets the status of each imported item to "Published".



**Note:** Retired offers and offer lists are not imported. Retired offer templates are imported with a status of "Disabled".

To review any error or warning conditions, navigate to the **Import Campaign Offers** page and click **Error(s) from current / last completed import job**.

**Table 11. Offer-related items imported from Unica Campaign**

Items imported (in sequence)	Possible errors and resolutions
1. Offer templates	<ul style="list-style-type: none"> <li>• A referenced standard attribute does not exist: Add the attribute to Unica Plan and re-import.</li> <li>• Unexpected error: Review details for possible causes, such as a network or database problem, and re-import.</li> </ul>

**Table 11. Offer-related items imported from Unica Campaign (continued)**

<b>Items imported (in sequence)</b>	<b>Possible errors and resolutions</b>
2. Offer folders	<ul style="list-style-type: none"> <li>• An offer folder with the same name exists: Rename the existing offer folder in either Unica Campaign or Unica Plan and re-import.</li> <li>• The parent offer folder does not exist: Resolve the error for the parent offer folder and re-import.</li> <li>• Unexpected error: Review details for possible causes, such as a network or database problem and re-import.</li> </ul>
3. Offers	<ul style="list-style-type: none"> <li>• A referenced offer template does not exist: Resolve the error for the offer template and re-import.</li> <li>• A referenced offer folder does not exist: Resolve the error for the offer folder and re-import.</li> <li>• A referenced user does not exist: Provision the user with privileges for Unica Plan and re-import.</li> <li>• An offer with the same offer code exists (warning): The offer is imported. Follow up by changing the code to a unique value in Unica Plan.</li> <li>• Unexpected error: Review details for possible causes, such as a network or database problem, and re-import.</li> </ul> <p> <b>Note:</b> When offer data and metadata are imported from Unica Campaign, the user who initiates the import becomes the owner of the offers in Unica Plan.</p>

**Table 11. Offer-related items imported from Unica Campaign (continued)**

Items imported (in sequence)	Possible errors and resolutions
4. Offer lists	<ul style="list-style-type: none"> <li>• One or more of the offers was not imported: Resolve the error for each offer and re-import.</li> <li>• A referenced offer folder does not exist: Resolve the error for the offer folder and re-import.</li> <li>• A referenced user does not exist: Provision the user with privileges for Unica Plan and re-import.</li> <li>• Unexpected error: Review details for possible causes, such as a network or database problem, and re-import.</li> </ul> <p> <b>Note:</b> When offer list data and metadata are imported from Unica Campaign, the user who initiates the import becomes the owner of the offer lists in Unica Plan.</p>

## Creating offers in an integrated system

When offer integration is enabled, you create offer templates and offers in Unica Plan and publish the offers for use in Unica Campaign.

The following steps provide a high-level overview of the workflow for offer creation when offer integration is enabled. Complete these steps in Unica Plan.

1. Review the offer attributes and templates that are imported from Unica Campaign (if any), and design new offer templates as needed.
2. To add new offer attributes, select **Settings > Plan Settings > Template Configuration > Shared Attributes**.
3. To create a form for the attributes you need, select **Settings > Plan Settings > Template Configuration > Forms**.

4. To create or edit an offer template, select **Settings > Plan Settings > Template Configuration > Templates**.



**Note:** For more information about designing a template to create offers available for real-time personalization, see [Defining suppression rules for real-time personalization \(on page 82\)](#).

5. Click the **Tabs** tab and select the form.
6. Publish the offer template to Unica Campaign.
7. To create an offer based on the offer template, select **Operations > Offers**, click the **Add Offer** icon, select an offer template, and use the wizard to create the offer. You can also create offer lists or folders.
8. Approve the offer and publish it to Unica Campaign. You also publish offer lists and offer folders to Unica Campaign.
9. Add the offer to output cells in the Target Cell Spreadsheet form in a campaign project.

When Unica Campaign is integrated with Unica Plan, a campaign project includes a Target Cell Spreadsheet tab. Double-click the **Assigned Offers** column in the TCS® to search or browse for offers.

10. Publish the TCS®.

The offer is now available in Unica Campaign. The attribute information is automatically passed to Unica Campaign when a user links a flowchart cell to the TCS® row.

## Managing offer templates and attributes when offer integration is enabled

In an integrated system, you access offer templates from **Unica Plan Settings** instead of **Campaign Settings**.

For more information about designing offer templates and attributes, see the Unica Campaign Administrator's Guide.

Follow these guidelines to manage offer templates and attributes in an integrated environment.

- To work with offer templates, select **Settings > Plan Settings > Template Configuration > Templates**. Use the options in the Offer Templates section to add, enable, edit, and perform other template operations.

See [Designing offer templates \(on page 19\)](#).

- To work with offer attributes, select **Settings > Plan Settings > Template Configuration > Shared Attributes**. Use the options in the **Offer Attribute** section to create or edit your custom offer attributes.

See [Offer attributes \(on page 23\)](#).

You can then add offer attributes to forms for use on offer templates. When you add an offer attribute to a form, you specify its behavior as parameterized, hidden, or hidden static. Forms for your offer templates can also include local or shared form and grid attributes, but those attributes and the data they collect are used only within Unica Plan. Only the data that is collected by offer attributes is published to Unica Campaign.

## Managing offers when offer integration is enabled

In an integrated system, you access offers from the **Operations** menu instead of the **Unica Campaign** menu. You can then complete tasks as you would in an unintegrated Unica Campaign system.

You also use Unica Plan to organize offers into offer folders and lists.



**Note:** When you delete an offer folder, all of the subfolders, offers, and offer lists that it contains are also deleted.



**Note:** In clustered environments, changes to offer folders are made on a single node. For information about configuring caching so that changes to offer folders are replicated to other nodes automatically rather than requiring a system restart, see the *Unica Plan Installation Guide*.

For more information about offers, see the Unica Campaign User's Guide.

Follow these guidelines to manage offers, offer folders, and lists in an integrated environment.

- To create an offer, complete the following steps:

1. Select **Operations > Offers**.
2. Click the **Add Offer** icon and select an offer template.
3. Use the wizard to create the offer.

You can select the **Is Approved** option to approve the offer when you create it, or you can approve it later. An offer is always in one of four states: Draft, Published, Redraft, or Retire. When an offer is created, its state is Draft.

4. To make the offer available in Unica Campaign, you must approve and then publish the offer.
- To approve an offer, complete the following steps:
    1. Select **Operations > Offers**.
    2. Click the linked offer name and select the **Is Approved** option.
    3. You can publish the offer to Unica Campaign.
  - To publish an offer, complete the following steps:



**Note:** Only approved offers can be published.

1. Select **Operations > Offers**.
2. Select the box next to the offer.
3. Click the **Status** icon and select **Publish Selected**.

This action pushes the offer instance to Unica Campaign. Published offers can be selected for use in a Target Cell Spreadsheet.

- To edit an offer, complete the following steps:



**Note:** A published offer cannot be edited until you change it to the "Draft" state.

1. Select **Operations > Offers**.
  2. Select the check box next to the published offer.
  3. Click the **Status** icon and select **Re-draft Selected**.
  4. You can then edit the offer and publish your changes.
- To retire an offer, complete the following steps:



**Note:** Only published offers can be retired. A retired offer is not available for future use and cannot be edited or changed to any other state.

1. Select **Operations > Offers**.
  2. Select the check box next to the published offer.
  3. Click the **Status** icon and select **Retire Selected**.
- To create an offer folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Click the **Add Folder** icon.
    3. To add a subfolder, click the linked folder name, and click the **Add Folder** icon.
    4. After you add a folder, you can add offers and offer lists to it. You must publish the folder to make it available in Unica Campaign.
  - To move items into a folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Locate the offer, offer list, or folder that you want to move.
    3. Select the check box next to the item, and click the **Move Selected Items** icon.
  - To publish an offer folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Check the box next to the folder and click the **Status** icon.

### 3. Select **Publish Selected**.

This action pushes the offer folder to Unica Campaign. However, this procedure does not publish any of the offers or subfolders that are in the "Draft" state.

These items must be published individually.

- To create an offer list, complete the following steps:



**Note:** In Unica Plan, the query builder for smart offer lists displays in edit mode only. In Unica Campaign, the query builder displays in both edit mode and view mode.

#### 1. Select **Operations > Offers**.

#### 2. Click the **Add Offer List** icon.



**Note:** You must publish an offer list to make it available in Unica Campaign.

## Assigning offers and offer lists to cells when offer integration is enabled

In an integrated environment, use Unica Plan to assign offers and offer lists to output cells in a Target Cell Spreadsheet (TCS®). The TCS® is a part of each campaign project in Unica Plan.



**Note:** To search or browse for offers, double-click the **Assigned offers** column for a row when the TCS® is in edit mode.

When you publish the TCS®, the offers are automatically assigned to cells when you select them in a contact process box in the flowchart. In this way, the TCS® cells are linked to flowchart cells. This method is known as "top-down" management.

To allow bottom-up target cells, complete the following steps.

1. Navigate to **Settings > Configuration > HCL Unica > Campaign > partitions > partition[n] > server > internal**.
2. Set `MO_UC_BottomUpTargetCells` to **Yes**.



**Note:** Additions and changes to the TCS® are not visible in Unica Campaign until you click **Publish** on the TCS®.

## Defining suppression rules for real-time personalization

Use the Unica Campaign and Unica Plan integration to make offers available for real-time personalization, and define rules to suppress offers that are no longer relevant for real-time personalization.

1. Click **Settings > Plan settings > Template Configurations > Templates**. Then click **Add Template** from the Offer Templates section.
2. When you create a new template or edit a template associate a form where offer shared attributes `InteractPointName` and `InteractPointID` are exposed.
3. Click **Operations > Offers**.
4. Complete the options in the **Offer suppression for real-time interactions** section.

You can choose when to suppress offers on offer acceptance, offer rejection, and offer presentation for various response types. You can also choose to suppress offers depending on the offer attributes and for how long to suppress the offer in days.

## Creating a Target Cell Spreadsheet

You can create a Target Cell Spreadsheet by following these steps.

Before you create a TCS, you must create any custom cell attributes that you want to include. Cell attributes map to Unica Campaign and can be created only as shared attributes.

1. Select **Settings > Plan Settings**.
2. Under **Other Options**, click **Template Configuration**.
3. Under **Template Components**, click **Forms**.

4. On the **Form Definitions** page, click **Create New Form**.

The **Form Editor** interface displays.



**Note:** Ensure that you do not use the "uap" and "umcm" prefixes while defining tables for forms and grids.

5. Complete the **Form Properties** tab and click **Save Changes**.

The **Add an Element** tab displays.

6. Click **Create New Grid**.

The **Create New Grid** dialog opens.

7. From the **Grid Type** drop-down list, select **Editable Grid View**.

8. Select the **Is TCS** check box.

9. Complete the remaining options and click **Save and Exit**.

On the **Add an Element** tab, click to expand the list of **Form Attributes**. Your TCS grid component displays.

10. To add a TCS grid to a form, you must place it within a group. If the form does not already contain a group for the grid, click and drag **Attribute Group Header** onto the form design area then name it appropriately.

11. From the list of **Form Elements**, click and drag your TCS® grid component and drop it onto the group.

The default cell attributes display on the grid. See [Default cell attributes for Target Cell Spreadsheets \(on page 18\)](#).

12. Add any attributes that you want to include in the TCS. You can do either of the following steps.

- Import custom cell attributes and add them to the TCS to create more columns. these columns are passed to Unica Campaign.
- Create or import grid attributes and add them to the TCS to create more columns. These columns display only in Unica Plan.



**Note:** Ensure that you do not use the "uap" and "umcm" prefixes while defining tables for forms and grids.

13. Click **Save and Exit** to save the TCS and return to the **Form Definitions** list page.

## Assigning offers and offer lists to cells when offer integration is enabled

In an integrated environment, use Unica Plan to assign offers and offer lists to output cells in a Target Cell Spreadsheet (TCS®). The TCS® is a part of each campaign project in Unica Plan.



**Note:** To search or browse for offers, double-click the **Assigned offers** column for a row when the TCS® is in edit mode.

When you publish the TCS®, the offers are automatically assigned to cells when you select them in a contact process box in the flowchart. In this way, the TCS® cells are linked to flowchart cells. This method is known as "top-down" management.

To allow bottom-up target cells, complete the following steps.

1. Navigate to **Settings > Configuration > HCL Unica > Campaign > partitions > partition[n] > server > internal**.
2. Set `MO_UC_BottomUpTargetCells` to **Yes**.



**Note:** Additions and changes to the TCS® are not visible in Unica Campaign until you click **Publish** on the TCS®.

## Disable and re-enable integration

Although it is possible to disable integration after you enable it, it is best to avoid this action if possible.

### Disabling Unica Plan-Unica Campaign integration

If you disable Unica Plan and Unica Campaign integration, Unica Campaign reverts to its stand-alone behavior and appearance. However, there are several important issues to keep in mind:

- To access flowcharts that are associated with integrated campaigns after you disable the integration, you must publish all campaigns in Unica Plan before you turn off the integration. The campaigns are then available in the top-level folder in Unica Campaign.
- If you disable the integration, there is no navigation link between campaign projects and campaigns. Users can still access their campaign projects, but the icons for creating and updating campaigns are disabled. The options for publishing TCS® data and getting cell status are not available. Campaign project templates are not included in the list of templates that users see.
- If you want to re-enable integration, contact technical support to discuss the implications. Any changes that are made to campaigns while integration is disabled are overwritten the first time you update the campaign or publish the TCS® from within Unica Plan after you re-enable the integration.

## Disabling offer integration

Try to avoid disabling offer integration, as this action can lead to inconsistent data. For example, an offer is created in Unica Plan and published to Unica Campaign. After offer integration is turned off, that offer is modified in Unica Campaign. If offer integration is turned on again, the change that is made in Unica Campaign is not synchronized with Unica Plan. Unica Plan does not have the updated offer information, even if offer data is reimported from Unica Campaign. The transfer of data between the products is primarily one way, from Unica Plan to Unica Campaign.

## Configuring property settings for integrated deployment

When Unica Plan and Unica Campaign are integrated, you use Unica Plan to plan, create, and approve campaigns.

For systems that enable offer integration, features for offer lifecycle management are added to Unica Plan. See [Enabling offer integration in Unica Plan \(on page 72\)](#).

To integrate Unica Plan and Unica Campaign, set the following properties.

1. On the **Settings > Configuration** page, under **HCL Unica**, click Unica Platform.
2. Click **Edit Settings** and set **Plan - Campaign** integration to True. This setting enables integration so that you can use Unica Plan to create, plan, and approve campaigns.
3. If your Unica Campaign installation has multiple partitions, set the properties for each partition where you want to enable integration. Expand **HCL Unica > Campaign > partitions > partition[n] > server** and click **internal**.
4. Click **Edit Settings** and set **MO\_UC\_integration** to **Yes**. This setting enables Unica Plan-Unica Campaign integration for this partition.



**Note:** To set either of the next two options to Yes, you must first set **MO\_UC\_integration** to **Yes**. The following options apply only when **MO\_UC\_integration** is enabled.

5. **Optional:** Set **MO\_UC\_BottomUpTargetCells** to **Yes**.

When **MO\_UC\_integration** is enabled, TCS® cells that are created from Unica Plan are always top-down. To allow for bottom-up Target Cell Spreadsheet cells for this partition, set this property to **Yes**. When set to **Yes**, both top-down and bottom-up target cells are visible, and a **Get Bottom Up Cells** control is available in the Unica Plan Target Cell Spreadsheet. This control gets bottom-up cells that are created in Unica Campaign into Unica Plan. The bottom-up cells are read-only in Unica Plan, and cannot be published back to Unica Campaign from Unica Plan.

6. **Optional:** Set **Legacy\_campaigns** to **Yes**.

This setting enables access to campaigns created before integration, including campaigns that were created in Affinium Campaign 7.x and linked to Affinium Plan 7.x projects.

7. Repeat steps 4-6 for other partitions as needed.
8. Expand **HCL Unica > Plan > umoConfiguration** and click **campaignIntegration**.
9. Click **Edit Settings** and set the **defaultCampaignPartition**.

When Unica Plan and Unica Campaign are integrated, this parameter specifies the default Unica Campaign partition to use when the campaign-partition-id is not defined by the project template. The default is **partition1**.

10. Set the **webServiceTimeoutInMilliseconds** for Web Services integration API calls.

This parameter is used as a timeout for web services API calls.

Continue with the steps for [Enabling offer integration in Unica Plan \(on page 72\)](#).

## The Target Cell Spreadsheet

You define all of the target and control cells for your campaign and assign offers in the Target Cell Spreadsheet. Your TCS® must contain all cell definitions for your entire campaign.

Multiple flowcharts in a campaign can link to cells in the TCS®, but each TCS® row can only be linked to only one flowchart cell. For example, you might have cells that are defined for wave one of a campaign that is delivered through email and different cells that are defined for wave two delivered through the call center. Wave one and wave two might be implemented in different flowcharts but the cells can share attribute values (for example, cell code) if they represent the same group of audience IDs in both flowcharts.

Each row must have values in the **Cell Name** and **Is Control Cell** columns or the row are not saved. If you do not provide a cell code, one is automatically generated when you publish the TCS®. If you provide a code, it must meet the cell code format requirements that are configured in Unica Campaign. If the **allowDuplicateCellCodes** configuration parameter is set to `FALSE`, cell codes must be unique within a flowchart. If you delete the cell code for a row in the TCS® and republish the TCS®, Unica Campaign creates a cell code for the row. Any existing link between that cell and a flowchart persists.

The TCS® is an editable grid, so you enter data in it just as you would in any other editable grid. You can copy and paste TCS® rows.

Additions or changes you make to the TCS® are not visible in Unica Campaign until you click **Publish** on the TCS®.

If you delete a row that is linked to a flowchart cell and republish the TCS®, any flowchart cell that is linked to that TCS® row becomes unlinked, although no data is lost. If that cell is input to a contact process (a Call List, Mail List, or Optimize process box), you must link the flowchart cell to another TCS® row before you can run the flowchart in production mode.



**Note:** The value of the control cell cannot be copied after the request is accepted,.

Consider the following points when Offer Integration is enabled with Plan.

- You can assign a published offer to the Mail List or Optimize process box by using match and link cells.
- After the offer is assigned, you cannot change it manually from the process box. If any changes are made to the offer from Plan, the changes are reflected in the process box only after the cells are unlinked and then linked again.

## Creating offers in an integrated system

When offer integration is enabled, you create offer templates and offers in Unica Plan and publish the offers for use in Unica Campaign.

The following steps provide a high-level overview of the workflow for offer creation when offer integration is enabled. Complete these steps in Unica Plan.

1. Review the offer attributes and templates that are imported from Unica Campaign (if any), and design new offer templates as needed.
2. To add new offer attributes, select **Settings > Plan Settings > Template Configuration > Shared Attributes**.
3. To create a form for the attributes you need, select **Settings > Plan Settings > Template Configuration > Forms**.
4. To create or edit an offer template, select **Settings > Plan Settings > Template Configuration > Templates**.



**Note:** For more information about designing a template to create offers available for real-time personalization, see [Defining suppression rules for real-time personalization \(on page 82\)](#).

5. Click the **Tabs** tab and select the form.
6. Publish the offer template to Unica Campaign.

7. To create an offer based on the offer template, select **Operations > Offers**, click the **Add Offer** icon, select an offer template, and use the wizard to create the offer. You can also create offer lists or folders.
8. Approve the offer and publish it to Unica Campaign. You also publish offer lists and offer folders to Unica Campaign.
9. Add the offer to output cells in the Target Cell Spreadsheet form in a campaign project.

When Unica Campaign is integrated with Unica Plan, a campaign project includes a Target Cell Spreadsheet tab. Double-click the **Assigned Offers** column in the TCS® to search or browse for offers.

10. Publish the TCS®.

The offer is now available in Unica Campaign. The attribute information is automatically passed to Unica Campaign when a user links a flowchart cell to the TCS® row.

## Managing offers when offer integration is enabled

In an integrated system, you access offers from the **Operations** menu instead of the **Unica Campaign** menu. You can then complete tasks as you would in an unintegrated Unica Campaign system.

You also use Unica Plan to organize offers into offer folders and lists.



**Note:** When you delete an offer folder, all of the subfolders, offers, and offer lists that it contains are also deleted.



**Note:** In clustered environments, changes to offer folders are made on a single node. For information about configuring caching so that changes to offer folders are replicated to other nodes automatically rather than requiring a system restart, see the *Unica Plan Installation Guide*.

For more information about offers, see the Unica Campaign User's Guide.

Follow these guidelines to manage offers, offer folders, and lists in an integrated environment.

- To create an offer, complete the following steps:

1. Select **Operations > Offers**.
2. Click the **Add Offer** icon and select an offer template.
3. Use the wizard to create the offer.

You can select the **Is Approved** option to approve the offer when you create it, or you can approve it later. An offer is always in one of four states: Draft, Published, Redraft, or Retire. When an offer is created, its state is Draft.

4. To make the offer available in Unica Campaign, you must approve and then publish the offer.

- To approve an offer, complete the following steps:

1. Select **Operations > Offers**.
2. Click the linked offer name and select the **Is Approved** option.
3. You can publish the offer to Unica Campaign.

- To publish an offer, complete the following steps:



**Note:** Only approved offers can be published.

1. Select **Operations > Offers**.
2. Select the box next to the offer.
3. Click the **Status** icon and select **Publish Selected**.

This action pushes the offer instance to Unica Campaign. Published offers can be selected for use in a Target Cell Spreadsheet.

- To edit an offer, complete the following steps:



**Note:** A published offer cannot be edited until you change it to the "Draft" state.

1. Select **Operations > Offers**.
  2. Select the check box next to the published offer.
  3. Click the **Status** icon and select **Re-draft Selected**.
  4. You can then edit the offer and publish your changes.
- To retire an offer, complete the following steps:



**Note:** Only published offers can be retired. A retired offer is not available for future use and cannot be edited or changed to any other state.

1. Select **Operations > Offers**.
  2. Select the check box next to the published offer.
  3. Click the **Status** icon and select **Retire Selected**.
- To create an offer folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Click the **Add Folder** icon.
    3. To add a subfolder, click the linked folder name, and click the **Add Folder** icon.
    4. After you add a folder, you can add offers and offer lists to it. You must publish the folder to make it available in Unica Campaign.
  - To move items into a folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Locate the offer, offer list, or folder that you want to move.
    3. Select the check box next to the item, and click the **Move Selected Items** icon.
  - To publish an offer folder, complete the following steps:
    1. Select **Operations > Offers**.
    2. Check the box next to the folder and click the **Status** icon.

### 3. Select **Publish Selected**.

This action pushes the offer folder to Unica Campaign. However, this procedure does not publish any of the offers or subfolders that are in the "Draft" state.

These items must be published individually.

- To create an offer list, complete the following steps:



**Note:** In Unica Plan, the query builder for smart offer lists displays in edit mode only. In Unica Campaign, the query builder displays in both edit mode and view mode.

#### 1. Select **Operations > Offers**.

#### 2. Click the **Add Offer List** icon.



**Note:** You must publish an offer list to make it available in Unica Campaign.

## Managing offer templates and attributes when offer integration is enabled

In an integrated system, you access offer templates from **Unica Plan Settings** instead of **Campaign Settings**.

For more information about designing offer templates and attributes, see the Unica Campaign Administrator's Guide.

Follow these guidelines to manage offer templates and attributes in an integrated environment.

- To work with offer templates, select **Settings > Plan Settings > Template Configuration > Templates**. Use the options in the Offer Templates section to add, enable, edit, and perform other template operations.

See [Designing offer templates \(on page 19\)](#).

- To work with offer attributes, select **Settings > Plan Settings > Template Configuration > Shared Attributes**. Use the options in the **Offer Attribute** section to create or edit your custom offer attributes.

See [Offer attributes \(on page 23\)](#).

You can then add offer attributes to forms for use on offer templates. When you add an offer attribute to a form, you specify its behavior as parameterized, hidden, or hidden static. Forms for your offer templates can also include local or shared form and grid attributes, but those attributes and the data they collect are used only within Unica Plan. Only the data that is collected by offer attributes is published to Unica Campaign.

## Assigning offers and offer lists to cells when offer integration is enabled

In an integrated environment, use Unica Plan to assign offers and offer lists to output cells in a Target Cell Spreadsheet (TCS®). The TCS® is a part of each campaign project in Unica Plan.



**Note:** To search or browse for offers, double-click the **Assigned offers** column for a row when the TCS® is in edit mode.

When you publish the TCS®, the offers are automatically assigned to cells when you select them in a contact process box in the flowchart. In this way, the TCS® cells are linked to flowchart cells. This method is known as "top-down" management.

To allow bottom-up target cells, complete the following steps.

1. Navigate to **Settings > Configuration > HCL Unica > Campaign > partitions > partition[n] > server > internal**.
2. Set `MO_UC_BottomUpTargetCells` to **Yes**.



**Note:** Additions and changes to the TCS® are not visible in Unica Campaign until you click **Publish** on the TCS®.

## Publishing the TCS®

To make the cell definitions and offer assignments in the TCS® available to Unica Campaign, you must publish the TCS®. Anytime you make updates to data in the TCS®, you must publish the TCS® again to make those changes visible to Unica Campaign.

To publish the TCS®, you must have the **Manage Campaign Target Cells** permission in Unica Campaign.

Every row must have a value for the **Cell Name** and **Is Control Cell?** columns before you publish the TCS®. If the TCS® contains unpublished data, the **Publish** button label is red.

A flowchart cannot link any cells to the TCS® rows until the TCS® is published. Although publishing the TCS® makes the data available to the flowchart in Unica Campaign, you cannot start a production run of a flowchart until all linked rows in the TCS® are approved. You can start a test run of a flowchart at any time.

If the data in the TCS® changes, you must publish the TCS® again to update the data available to Unica Campaign.

If the TCS® contains data that has not been published, the **Publish** button label is red.

To publish the TCS®, complete the following steps.

1. Open the project that contains the TCS®.
2. Click the **Target Cell Spreadsheet** tab.
3. Click **Publish**.