

# **Unica Plan to Unica Centralized Offer Management V12.1.0 Migration Guide**



# Contents

- Chapter 1. Overview..... 1**
- Chapter 2. Benefits of Unica Centralized Offer Management..... 2**
- Chapter 3. Things to know before switching to Unica Centralized Offer Management..... 4**
- Chapter 4. Steps to Migrate to Unica Centralized Offer Management..... 7**
  - Configuration changes..... 7
  - Migration utility..... 8
    - Exporting templates..... 9
  - Review roles, permissions, and configurations.....10


# Chapter 1. Overview

From Unica 12.1.0.3 onwards, you can migrate offer management capabilities of Unica Plan to Unica Centralized Offer Management.

Unica recommends that Unica Plan customers evaluate the capabilities of Unica Centralized Offer Management before switching to Unica Centralized Offer Management. Once the users move to Unica Centralized Offer Management, and start managing the migrated offers in Unica Centralized Offer Management, support for switching the offer management capability back to Unica Plan will not be available.

# Chapter 2. Benefits of Unica Centralized Offer Management

The benefits of Unica Centralized Offer Management's offer management capabilities are as follows:

 **Note:** The benefits listed here are the benefits of Centralized Offer Management as on version 12.1.0.3. For more feature details, see *Centralized Offer Management product guides*.

- A new and intuitive user interface.
- Improved performance with a large dataset.
- REST APIs for every action available in Centralized Offer Management.
- Extendable data model that allows you to:
  - Create offers without a template.
  - Add additional attributes to the existing offers or existing offer templates.
  - Save existing offers as a template.
- Support for new data types, which includes:
  - `Select box - Database` - use `Select box - Database` attribute for adding a dropdown box with values from the selected datasource. If you have use multiple `Select box - Database` attributes in your template, you can add a dependency between the attributes. Once the dependency is set between two `Select box - Database` attributes, the options in the dependent attribute changes based on the selection made in the parent attribute.
  - `Boolean` - use the `Boolean` attribute type to select or deselect a checkbox (for example true or false) for the attribute.
  - `Integer` - use the `Integer` attribute type to fill numeric data without decimal places.
  - `Rich text` - use the `Rich text` attribute to write and format content.
- In Centralized Offer Management, you can set Standard offer attributes and Custom offer attributes as mandatory or non-mandatory.

- Use the `Picker - URL` attribute to select content from third-party CMS via integration with Unica Content Integration.
- Use the **Content Integration** feature to map content attributes with offer attributes.
- (Applicable from 12.1.0.4 onwards) Integration with Cognitive Service Platforms to fetch the cognitive tags from image URLs.

# Chapter 3. Things to know before switching to Unica Centralized Offer Management

Only published templates, published folders, published offers, and published offer lists will be available in Centralized Offer Management. Even in case of attributes, only the attributes associated with published templates will be available in Centralized Offer Management. Only the last published state of data from Plan will be available in Centralized Offer Management. Unpublished updates made in published data will not be available in Centralized Offer Management.

## Differences between Plan and Centralized Offer Management as of 12.1.0.3

After switching the offer management capabilities to Centralized Offer Management, only the capabilities offered by Centralized Offer Management are applicable. Some of the capabilities that differ in Centralized Offer Management are as follows:


- In Centralized Offer Management, you cannot delete offers. You can only retire offers.
- Centralized Offer Management does not support feature of enabling and disabling offer templates. You can only retire offer templates. Additionally, offer templates that are already disabled in Plan, will appear as `Retired`.
- Centralized Offer Management does not support Triggers and Procedures.
- Till release 12.1.0.3, Centralized Offer Management did not support the state transition capability of offers and offer lists (like `DRAFT`, `PUBLISHED`). From release 12.1.0.4 onwards, this capability has been introduced in Centralized Offer Management. However, Plan will migrate only `PUBLISHED` offers.
- Centralized Offer Management's `Creative URL` does not integrate with Plan's DAM. If you have already associated the `Creative URL` attribute with Plan's asset, you will only see the reference string in the `Creative URL` of Centralized Offer Management.
- Centralized Offer Management does not support message board capabilities.
- Centralized Offer Management does not support tracking of offer changes in the **Analysis** tab.

- Centralized Offer Management does not support folder management capability at offer template level. All offer templates from Plan will appear at root level in Centralized Offer Management, and if required, you can reorder the templates.
- Centralized Offer Management does not support forms and form groups. The attributes at offer level will appear without tabs and form groups.
- Centralized Offer Management does not support restricting `Select box` options at template level unlike the **Manage form** capability in Plan.
- Centralized Offer Management does not support attachments.
- Centralized Offer Management does not support Plan's form attributes as they are not available in Centralized Offer Management. Only offer attributes will be available in Centralized Offer Management.
- Centralized Offer Management does not support custom links capability.
- Centralized Offer Management does not support Plan's icons for offer template.
- Till release 12.1.0.3, Centralized Offer Management did not support attribute visibility rules to show or hide attributes. From 12.1.0.4 onwards, the support has been introduced. However, you must create visibility rules, in Centralized Offer Management, at template level. The visibility rules will not be migrated from Plan.
- Centralized Offer Management does not support Plan's multi-line attributes. They will be converted to normal text attribute.
- Centralized Offer Management does not support Plan's calculated field attribute, they will be converted to numeric attribute in Centralized Offer Management and the value of the offer attribute will be as calculated when the offer was published.
- Since Centralized Offer Management does not support forms, if you have modified a single attribute's definition in multiple forms in Plan, only a single definition (of the last published form) will be available in Centralized Offer Management.

There may be a few other minor differences. We recommend that you evaluate Unica Centralized Offer Management before opting to switch the offer management capabilities of Unica Plan to Unica Centralized Offer Management. Some minor differences are as follows:

- Till the release 12.1.0.3, you could update Retired offers in Centralized Offer Management, that was not possible in Plan. However, from release 12.1.0.4 onwards, you can update the Retired offers only after changing the state to Draft.

- In Centralized Offer Management, the Select box attribute does not show invalid values (a value which is not part of options list). However, Plan used to show such invalid values.

 **Note:** In forthcoming releases, if Centralized Offer Management introduces any of the earlier mentioned capabilities, Plan's data, for that capability, will not be automatically migrated to Centralized Offer Management, unless it is documented.



# Chapter 4. Steps to Migrate to Unica Centralized Offer Management

The following are the prerequisites before starting the migration process:

- Install Unica Centralized Offer Management.
- Ensure that you have **OfferAdmin** and **PlanAdmin** privileges and permission required to update all the offer templates in Unica Centralized Offer Management.
- In Unica Plan, if you are using reverse proxy or web access management software (ISAM, Siteminder, etc), populate `serverURLInternal` with the direct internal URL of Unica Centralized Offer Management. For example, `serverURLInternal= http://<hostname>:<port>/Offer`.

1. [Configuration changes \(on page 7\)](#)
2. [Migration utility \(on page 8\)](#)
3. [Review roles, permissions, and configurations \(on page 10\)](#)

## Configuration changes

To configure the switching of offer management from Unica Plan and Unica Centralized Offer Management, complete the following steps:

1. From the Unica Platform home page, select **Settings > Configuration**.  
The **Configuration** page appears.
2. On the Configuration categories panel, select **Unica Platform**.  
The **Settings for 'Unica Platform'** page appears.
3. Select **Edit settings**.  
The **Edit Settings for Unica Platform** page appears.
4. Set **HCL Plan - Offer integration** to `FALSE`.

5. Set **Enable Centralized offer management** to **YES**.

6. Click **Save**.

7. Log out and log back in to Unica.

You will see the **Offer** menu. Also, the menu item **Offer**, within the menu **Plan**, will not exist.

## Migration utility

Centralized Offer Management points to the Campaign database. Hence, all the published offer-related data should be already available to Centralized Offer Management. However, there were few data issues between Plan offer management tables and Centralized Offer Management tables. This utility, introduced in 12.1.0.3 version of Plan, helps correcting the data in Campaign.

The utility performs the following actions:

- Pushes the correct definition of the Single Select Database attribute in Centralized Offer Management.
  - Utility will push the correct definition to Centralized Offer Management, however it is the user's responsibility to migrate lookup tables from Plan schema to respective Campaign schema of all the partitions. Unica Plan provides an option to Export offer templates. For more information, see Exporting templates.
- Pushes the correct definition for the Money attribute.
- Pushes the dependencies between Single-select database attributes.
- Marks all the disabled templates in Plan as retired in Centralized Offer Management.

To run the utility, perform the following steps:

1. From the Unica Platform home page, select **Settings > Plan settings**.  
The **Administrative settings** page appears.

2. Within **System administration settings**, select **Migration to Centralized Offer Management** from the **Other options** group.  
The **Migration to Centralized Offer Management** dialog appears.
3. Click **Continue** to complete the migration.  
This will migrate all the offers, offer templates, and custom attributes to Centralized Offer Management.

## Exporting templates

When migrating offers and offer attributes from Plan to Centralized Offer Management, most offers and offer attributes migrate successfully without any additional configurations required post migration.

The `Select Box - Database` attribute is mapped to a table of the Datasource. Such attributes, post migration, must be configured to link to the table and datasource. If such tables do not exist in Centralized Offer Management, you must migrate lookup tables from Plan schema to respective Campaign schema of all the partitions. To avoid the manual migration of lookup tables from Plan schema to respective Campaign schema, use the Export template feature of Unica Plan. To export template from Plan to Centralized Offer Management, complete the following steps:

1. From the Unica Platform home page, select **Settings > Plan settings**.  
The **Administrative settings** page appears.
2. In **Other options** within **System administration settings**, select **Data Migration**.  
The **Data Migration** page appears.
3. Within **Data Migration**, click on the **Export** button of **Templates**.  
The **Export template** page appears.
4. Within **Export templates**, uncheck everything except Offer.
5. Select the appropriate value from **Database type** and click **Export**.  
A `<offer-name>.zip` file downloads in your system.

6. Navigate to the folder **<offer-name>.zip > Forms folder** and extract it to the required location on your system.
7. Copy the following `SQL` script files:
  - `droplkup.sql`
  - `createlkup.sql`
  - `insertlkup.sql`
8. Run the scripts files in the defined order on your Unica Campaign schema. First run `droplkup.sql` script, then `createlkup.sql` script and finally `insertlkup.sql` script.

## Review roles, permissions, and configurations

Plan uses its own roles, permissions, and policies, where as Centralized Offer Management uses Campaign's. Please review the user roles and permissions, and configure as per the requirement.

Also, post migration, access all the configurations and ensure that there are no changes in configurations post migration. Sometimes, migration of offers may cause a change in configuration, for example the `defaultLocale` and the `currencyLocale` may be different. `currencyLocale` in Centralized Offer Management should be same as Plan. To update `currencylocale` in Centralized Offer Management, complete the following steps:

1. From the Unica Platform home page, select **Settings > Configuration**.  
The **Configuration** page appears.
2. Select **offer** under **HCL Unica**  
The **Settings for 'offer'** page appears.
3. Click on **Edit settings**  
The **Edit settings** page appears.
4. Update the value in `currencyLocale`, `supportedLocale` and `defaultLocale`. Click on **Save changes**.

Save successful message appears.

For more information on setting roles, permissions, and configurations, see [Unica Centralized Offer Management Administrator's Guide](#).