

## **Unica Plan to Unica Centralized Offer Management V12.1.7 Migration Guide**



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# Chapter 1. Overview

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.
  - `Picker - URL` - use the `Picker - URL` attribute to select content from third-party CMS via integration with Unica Content Integration.
- Set Standard offer attributes and Custom offer attributes as mandatory or non-mandatory.
- Integration with Digital Asset Management systems and Content Management Systems.
  - Out-of-the-box integrations with HCL DX Media Library, HCL DX, Adobe Experience Manager, and XMPIE.
  - Open framework for customer to integrate with any other DAM or CMS.
- Integration with Cognitive Service Platforms to fetch the cognitive tags from image URLs.
  - Out-of-the-box integration with Microsoft Azure, Google Cognitive Services, and Snap-CAST.
- Integration with any commerce platform and provides out-of-the-box integration with HCL Commerce
- Map and pick content attributes in offer attributes using the **Content Integration** feature.
- Allows auto sync between CMS and Centralized Offer Management.
- **Custom actions** feature to integrate with any third-party system.
- Create and manage multiple variants of an offer.
- Easily integrate with third-party systems using Webhooks and Custom actions.

# 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

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 the Duplicate Offer List option.
- 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. However, it supports Webhooks and Custom actions feature to integrate with third-party systems.
- Centralized Offer Management supports the state transition capability of offers and offer lists (like **DRAFT**, **PUBLISHED**). 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. However, Centralized Offer Management's **Creative URL** can integrate with any third-party CMS or DAM using Unica Content Integration.
- Centralized Offer Management does not support message board capabilities.
- 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. However, Centralized Offer Management supports Custom actions.
- Centralized Offer Management does not support Plan's icons for offer template.
- Centralized Offer Management supports attribute visibility rules to show or hide attributes. 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. However, Centralized Offer Management supports Rich 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.
- Teams and team members configured in Plan's offer are not migrated to 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:

- You can update the Retired offers, in Centralized Offer Management 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 from Plan's Offer Management to Centralized Offer Management

You can migrate from Plan's offer management to offers to Centralized Offer Management, and also migrate offers history and offer lists history. Before starting the migration process, ensure that the following prerequisites are met:

## Before you begin

- Install Unica Centralized Offer Management.
- This migration activity, which includes migrating Plan's offer management to Unica Centralized Offer Management and migrating offer history and offer list history to Unica Centralized Offer Management, needs to be performed by one user from each partition. Ensure that the user performing the migration has **OfferAdmin** and **PlanAdmin** privileges, and the 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`.
- Before migrating the offer history, from Unica Plan to Unica Centralized Offer Management, for all offer records and offer list records, run the the following query on Unica Plan's database:

```
select a.mktg_object_id, a.partition_id,t.partition_id from uap_mktgobject m, uap_offer_attributes a , uap_tt_templates t where m.mktg_object_id = a.mktg_object_id and m.template_name= t.template_name and t.object_type = 17 and a.is_offer_list is null and a.partition_id is null and t.partition_id is not null;
```

If the execution of the query results in some data, it indicates a data issue. Please contact Unica Support team for a resolution.

## About this task

To migrate offers and offer lists, and their history, from Unica Plan to Unica Centralized Offer Management, complete the following procedures:

1. [Configuration changes on page 5](#)
2. [Using the Migration utility on page 6](#)
  - a. [Exporting templates on page 7](#)
3. [Migrating offer history or offer list history on page 8](#)
4. [Reviewing roles, permissions, and configurations on page 8](#)

## 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**.

### Result

The **Configuration** page appears.

2. On the Configuration categories panel, select **Unica Platform**.

**Result**

The **Settings for 'Unica Platform'** page appears.

3. Select **Edit settings**.

**Result**

The **Edit Settings for Unica Platform** page appears.

4. Set **HCL Plan - Offer integration** to `TRUE`.



**Note:** Before running the [Using the Migration utility on page 6](#), which migrates offers from Unica Plan to Unica Centralized Offer Management, ensure that the **HCL Plan - Offer integration** to `TRUE`. After the migration is successfully completed, set the value of **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.

**Result**

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

## Using the 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 helps correcting the data in Campaign.

### Before you begin

When you run the Migration utility, it gets executed only for the logged-in user's partition. You must run the Migration utility for all the partitions of Centralized Offer Management.

### About this task

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**.

**Result**

The **Administrative settings** page appears.



2. Within **System administration settings**, select **Migration to Centralized Offer Management** from the **Other options** group.

**Result**

The **Migration to Centralized Offer Management** dialog appears.

3. Click **Continue** to complete the migration.

**Result**

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.

### About this task

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, complete the following steps:

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

**Result**

The **Administrative settings** page appears.

2. In **Other options** within **System administration settings**, select **Data Migration**.

**Result**

The **Data Migration** page appears.

3. Within **Data Migration**, click on the **Export** button of **Templates**.

**Result**

The **Export template** page appears.

4. Within **Export templates**, uncheck everything except Offer.

5. Select the appropriate value from **Database type** and click **Export**.

**Result**

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.

## Migrating offer history or offer list history

In Unica version 12.1.1, Plan has introduced a utility to migrate offer history or offer list history to Centralized Offer Management.

### About this task

The history records eligible for migration must meet the following criteria:

- For offers or offerlists, which are in published state, the entire history is migrated.
- For offers or offerlists, which are in retired state, the entire history is migrated.
- For offers or offerlists, which are in draft state (either new or redrafted), all the history records till the most recent published event are migrated.

The system refreshes the status of migration till it is complete. If there is a failure in migration for some offers or offerlists, the migration is flagged as incomplete and users must contact Support to fix the issue and retry the migration.

In case of offers or offerlists, records migrated earlier are not migrated again.

To migrate offers history or offer lists history, complete the following steps:

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

#### Result

The **Administrative settings** page appears.

2. Within **System administration settings**, select **Migrate offer/offer list history** from the **Other options** group.

#### Result

The **Confirm** dialog appears. If you are migrating for the first time, you will see the number of records that will be migrated. If you have performed the migration earlier, you will see the number of records migrated in the previous migration and the number of records that will be migrated in the current migration.

3. Click **OK**.

#### Result

The **Migrating Offer/Offer list history** dialog appears. You can click **Close** before or after the migration completes. If you click **Close** before the migration activity is completed, the migration continues as a background process till it completes the activity.

## Reviewing 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.

### About this task

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**.

**Result**

The **Configuration** page appears.

2. Select **offer** under **HCL Unica**

**Result**

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

3. Click on **Edit settings**

**Result**

The **Edit settings** page appears.

4. Update the value in currencyLocale, supportedLocale and defaultLocale. Click on **Save changes**.

**Result**

Save successful message appears.

For more information on setting roles, permissions, and configurations, see *Unica Centralized Offer Management Administrator's Guide*.