

## Unica Segment Central V12.1.6 User's Guide



# Contents

- Chapter 1. About Segment Central..... 1**
- Chapter 2. Prerequisites for creating strategic segments..... 2**
- Chapter 3. Creating strategic segments..... 3**
- Chapter 4. Viewing segment listing.....5**
- Chapter 5. Viewing strategic segments.....6**
- Chapter 6. Editing a strategic segment..... 7**
- Chapter 7. Moving a segment..... 8**
- Chapter 8. Deleting strategic segments..... 9**
- Chapter 9. Organizing strategic segments..... 10**
  - Adding a segment folder..... 10
  - Editing a segment folder..... 10
  - Moving a segment folder..... 11
  - Deleting a segment folder..... 11
- Chapter 10. Export Settings..... 12**
- Chapter 11. Scheduling..... 14**

# Chapter 1. About Segment Central

As the name suggests Segment Central is centralized application to create and manage strategic segments. In Segment Central we can create strategic segments based on audiences having base tables. Using base table mapping you can create rules, based on these rules the set of ids present inside each base table forms a segment. Segments will select records from the existing base table based on the defined rule. Segments can also be created using existing segments.

## Chapter 2. Prerequisites for creating strategic segments

Before you create a strategic segment, you must meet the following prerequisites.

- You must have the appropriate permissions to work with strategic segments.
- For accessing Segment Central, it is must to have Audience Central configured with at least one Audience and its corresponding base table mapping.

# Chapter 3. Creating strategic segments

To create strategic segments, complete the following steps:

1. Select **Marketing Central > Segment Central**

**Result**

The All segments page appears.

2. Click on **+ Segment** button

**Result**

Create new segment page appears

3. Provide values for the following fields:

- Segment name
- Description
- Security policy - Any segment created will inherit its security policy and the list will appear in the dropdown.
- Usage category - It is used for searching or grouping similar segments. It has auto complete feature. If you are adding a new tag, then on enter it will get saved and will be available for future use.

4. Segments can be created in two ways:

- Using rule builder
- Using existing segments

5. For creating segment Using rule builder, provide values for the following fields:

- a. **Select Audience** - Select the Audience from the dropdown.

**Select table** - All the base tables mapped with that Audience appears in the dropdown of this field.

- b. Once the Audience and table is selected, section for defining rules appears. Provide values to **Field, Condition** and **Value** fields for defining rule. For some conditions multiple values can be added by clicking on the **+ADD** button.

- c. Click on **+Add rule** button for adding multiple rules.

Complex rules can be created by adding groups. Set of rules can be clubbed in one group. Click on **+Add group** button for creating multiple groups.

6. For creating segment **Using existing segments**, provide values for the following fields:

- **Select Audience** - Select the Audience from the dropdown.
- **Select Operation** - Two types of operations are supported **Union** and **Intersection**

Click **Add segments**

Add segment page appears

List of strategic published segments are displayed. User can also search for the segment using the **Search segments (across folders)** option or can select the segment from the folder list.

7. Select two or multiple segments and click **Select**.

**Result**

All the selected segment with number of records will be displayed on **Create new segment** page.

8. Click on the desired action button:

- a. **Test run** - Before publishing if you want to know the number of matching records out of total records, then click Test run. You can test run the process to verify that it returns the results you expect. If not, then you can modify the rule.
- b. **Cancel** - To cancel the segment creation
- c. **Save** - Segment gets saved in draft mode and is available for making changes.
- d. **Save & publish** - Segment gets saved and published.



**Note:** Initially segment will be in publishing state (as all the matching records will be fetched) and once all the records are fetched it will be in Published state. If publishing is taking longer time than expected then you can cancel publishing.

9. Click on **Add new** button in **Export settings** section for adding export setting. For more details, see Adding Export settings. After export settings is executed you can see export history details like time of execution and execution status. User can restart failed jobs, also they can stop the jobs with started status. Updated status are available only after refreshing the page.

## Chapter 4. Viewing segment listing

Segment present on All Segments page will display the number of records present in that segment and also the last run date. For published segments, the date on which the segment was published will be displayed.

**Sort by** - You can sort the segments on the **All Segments** page by clicking on **Sort by** button. Following sorting options are available:

- Segment Name: Ascending
- Segment Name: Descending
- Count: Ascending
- Count: Descending
- Last Run Date: Ascending
- Last Run Date: Descending

You can also filter segments based on their status. Options available are:

- All
- Draft Segment
- Publishing Segment
- Failed Segment
- Publishing Segment
- Cancelled Publish

# Chapter 5. Viewing strategic segments

## About this task

After creating segments, you can view its summary. To view segment, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

### Result

The **All Segments** page appears

2. Click the name of the segment that you want to view.
3. The Summary page provides information about the segment.

Element	Description
Segment Name	Display the name of the segment
Segment Type	Display segment type
Status	Status of the segment, for example Draft, Published and Failed
Security Policy	The security policy applied to the strategic segment
Description	The description of the segment provided during segment creation
Usage category	The tags added to the segment
Audience level	The audience level for the segment
For rule based segment	It will have table name and rule representation
For composite segment	It will have operations and names of member segment



# Chapter 6. Editing a strategic segment

## About this task

You can change the details of a strategic segment.

1. Select **Marketing Central > Segment Central**
2. Click the name of the segment whose summary you want to edit

### **Result**

The segment opens to its Summary tab.

3. Click **Edit**

### **Result**

The **Edit segment** page appears.

4. For draft segments, rule or compositions can be edited along with other basic details. For other segments, only basic details can be edited.
5. Click **Save**

### **Result**

Segment updated successfully



**Note:** Listing will list campaign created segments as well as smart segments created by interact. For both these types, only basic details can be edited. We cannot change their states.

# Chapter 7. Moving a segment

## About this task

For moving a segment, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

### **Result**

The **All Segments** page appears

2. Open the folder that contains the segment that you want to move.
3. Select the check box for the segment that you want to move. Select Move icon

Or

4. You can select multiple segments to move to the same location at one time. Select Action button and click on move option
5. Select the location to which you want to move the selected segment.

6. Click **Move here**

### **Result**

A **Move segments** confirmation message saying **Are you sure? You are about to move the selected (n) segments into the folder 'Folder name'** appears.

7. Select **Move**

### **Result**

The segment is moved into the destination folder.

# Chapter 8. Deleting strategic segments

## About this task

Use the following procedure to delete a strategic segment directly from the All Segments page.

1. From the Platform home page, select **Marketing Central > Segment Central**

### **Result**

The **All Segments** page appears.

2. Open the folder that contains the segment that you want to delete.
3. Select the check box next to the segment that you want to delete. You can select multiple segments to delete at one time.
4. Click **Delete**

### **Result**

The **Delete segments** confirmation message appears saying **Are you sure? You are about to delete the selected (n) segments and they will not be available in the future** appears.

5. Click **Delete**.

# Chapter 9. Organizing strategic segments

You can organize your strategic segments by creating a folder or series of folders. You can then move strategic segments from one folder to another within the folder structure you have created.



**Note:** The folder in which a strategic segment resides specifies the security policy applying to the strategic segment, determining who can access, edit, or delete it.

## Adding a segment folder

### About this task

You can add, move, and delete folders to organize strategic segments. For adding a new folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

#### Result

The **All Segments** page appears

2. Click **+Folder**

#### Result

The Add folder pop-up appears

3. Provide values for the following fields:

- Display name
- Security policy
- Description

4. Click **Save**

#### Result

Folder created successfully.

## Editing a segment folder

### About this task

For editing a segment folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

#### Result

The **All Segments** page appears

2. Select the folder that you want to edit. Right click on the folder and click on Edit option. Else, from the folder list section, click on **Actions** button and select **Edit** option.

#### Result

The **Edit segment** pop-up appears.

3. Make the required changes.

4. Click **Save**

## Moving a segment folder

### About this task

You can organize strategic segments by creating folders for them, and then moving the folders into a hierarchical structure. For moving a new folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

#### Result

The **All Segments** page appears

2. Select the folder that you want to move. Right click on the folder and click on Move option. Else, from the folder list section, click on **Actions** button and select **Move** option.

#### Result

The **Selected folders** page appears.

3. Select the location to which you want to move the selected folder.
4. Click **Move here**.

#### Result

A **Move folders** confirmation message saying Are you sure? You are about to move the selected (n) folders into the folder 'Folder name' appears.

5. Select **Move**.

#### Result

The subfolder and all of its segments are moved into the destination folder.

## Deleting a segment folder

### About this task

You must move or delete the contents of a folder before you can delete it. If you have the permissions that are required to delete a folder, you can also delete any of the subfolders in that folder. For deleting a folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

#### Result

The **All Segments** page appears

2. Locate the folder that you want to delete and select the check box next to the folder. You can select multiple folders to delete at one time.
3. Select the folder that you want to delete. Right click on the folder and click on delete option. Else, from the folder list section, click on **Actions** button and select **Delete** option.

#### Result

The **Delete folders** confirmation message appears saying **Are you sure? You are about to delete the selected folders and once deleted they will not be available in the future** appears.

4. Click **Delete**.



**Note:** Folders with active/inactive segments cannot be deleted.

# Chapter 10. Export Settings

Segments created from Segment Central can be used to start a journey. Users need to define export settings for sending data from segment central to Journey. Publish to Journey happens via Unica Content Integration framework. Ensured that Content Integration framework (Asset Picker) is installed, deployed and configured correctly.

## Before you begin

For using export functionality add the following configurations:

To perform the configuration, complete the following steps:

- Select Settings> Configuration
- From the Configuration categories panel, expand Segment Central | partitions | partition1 | Content Integration | dataSources. We need to create system configurations for Audience Central, Segment Central and Journey

For more details, see Unica *Segment Central Installation Guide*.

## About this task

For adding an export setting, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

### Result

The **All Segments** page appears

2. Click on the segment on which you want to add export setting. Click on **Actions** button from Segment Summary page and select **Add export settings** option.

### Result

The **Export settings** page appears.

3. For adding export settings, provide values for the following fields:

- **Name** - Define a name for the export setting.
- **Select audience table** - Select the audience table from the dropdown of the field.

For rule-based segment, name of the audience table will auto-populate.

### Export to

- **Select target system** - select the target system from the dropdown of the field. Currently, Journey is supported as target system.
- **Select journey data definition** - Click on the **Browse** button to select data definition.



**Note:** Only Kafka type of entry sources defined in Journey will be listed

- **Select journey entry source** - Click on the **Browse** button to select entry source.

Based on selected journey data definition, Fields mapping (Journey - Segment Central) table appears. This table displays two columns Journey and Segment Central. Journey column will have all the Journey fields associated to the selected data definition. Segment Central column will list the fields of the selected audience table. User needs

to map Journey fields with Segment Central fields by selecting appropriate options from the dropdown of Segment Central field.



**Note:** Map only those columns which you want to fetch in the Journey fields.

4. Click on **Save**.

#### **What to do next**

# Chapter 11. Scheduling

Scheduling is a new feature introduced in Segment Central version 12.1.5. Using Platform's scheduler capability, you can schedule segment publish and export actions.

## Creating schedules

To create schedules for segments, complete the following steps:


1. Create a new Segment or open an existing Segment.

### Result

The Segment page opens.

2. Perform one of the following steps based on the type of scheduling:

- a. For scheduling a segment publish, select **Schedule > Add schedule - Segment publish**.

- b. For scheduling an export setting, scroll down to the **Export setting** section and select the  icon.

3. Provide the necessary details to create the schedule. For more information, see the topic **The Unica Scheduler** in *Unica Platform V12.1.5 Administrator's Guide*.

4. Click **Run with this schedule**.

### Result

The Schedule <segment-name> page opens.

### Example

Segment Central does not support publishing of segments created by Interact or Campaign. Additionally, since Segment Central does not support publishing of segments created by Interact or Campaign, you cannot add schedules to such segments.

## Viewing existing schedules of segment publish

To view already created schedules for segments, complete the following steps:

1. Create a new Segment or open an existing Segment.

### Result

The Segment page opens.

2. You can access existing segments in either of the following ways:

- a. **From the Schedule dropdown button**

- i. On the <Segment-Name> page, select **Schedule > All schedules**. Also, if your schedule is the most recently accessed, you can see it displayed under the **Schedules** section. The system displays the last 10 recently accessed schedules. All schedules refers to Schedules added only to a particular segment and not all segments. If you select a schedule, you are redirected to the particular schedule page, If you select **All schedules**, you are redirected to the list of schedules.

- ii. On the Schedule Manager, you can see:



1. The **Schedules** tab that lists all the schedules.
2. The **Runs** tab that lists all the schedules that were run, and its results.
3. The **Run exclusion** tab that lists all the exclusions added.

b. From the **Schedule Manager**

- i. Select **Settings > Schedule management**. The Schedule management page appears with three tabs: **Schedules, Runs, Run exclusion**.
- ii.
  1. The **Schedules** tab that lists all the schedules.
  2. The **Runs** tab that lists all the schedules that were run and its results.
  3. The **Run exclusion** tab that lists all the exclusions added.
- iii. From the **Schedule Manager**, you can also:
  1. Create a schedule - When you create a schedule using this option, the system first redirects you to the Segments listing page. Select a segment for which you want to create the schedule.
  2. Edit the schedule list filter



**Note:** For more details, see *Unica Platform V12.1.5 Administrator's Guide*.