

Unica Segment Central V12.1.8 User's Guide



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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. Segment Suggestions

In version 12.1.7, we introduced a new centralized component named AI-ML. This component is currently only used by Segment Central for the Segment Suggestion feature.

As a part of the Segment Suggestion feature, the AI-ML component:

- scans the audience table from the selected user database.
- suggests rule-based segments based on user requirements like:
 - Audience features/table columns selection
 - Audience filters
 - Segment size
- provides first-level insights on potential segments.
- allows users to view, alter, test, save, and publish strategic segments.
- works in asynchronous mode.

Accessing Suggestions

To access Suggestions, ensure that you have installed the AI-ML component and configured it.

Before you begin

Ensure that you have installed the AI-ML component or upgrade to Unica 12.1.7 or later and install the AI-ML component.

- To install the AI-ML component, see *Unica Platform Installation Guide*.
- To upgrade to Unica 12.1.7 or later versions, see *Unica Platform Upgrade Guide* and *Unica Segment Central Upgrade Guide*.

1. Navigate to **Marketing Central > Segment Central**.

Result

The **All Segment** page opens.

2. Click **Suggestions**.

Result

One of the following pages opens:

- The **Suggest segments** page opens for you to create a new segment suggestion request. This page opens if you have never created suggestions using Segment Central.
 - The **Segment suggestions** page opens listing the recent request(s) and results. This page opens if you have created suggestions using Segment Central.
 - You will see an error. If you see an error, it means that the AI-ML component is not installed. See [Prerequisites on page 12](#).
3. If the **Suggest segments** page opens, see [Creating Suggestions on page 13](#).
 4. If the **Segment suggestions** page opens, you can perform the following tasks:

- a. To create a new suggestion, click **+ Suggestions**.
- b. Select any request from the **Recent request(s)** list to view the results of the request. By default, the last 10 requests appear in the list. If required, you can change the default history size. For more information see the **Deploying AI-ML** section in *Unica Platform V12.1.7 Installation Guide*. To refresh the list, use the  icon.

In the **Recent request(s)** list, select the  icon, succeeding a request, to perform the following operations:

- To view the highlighted suggestion, select the  icon.
 - To clone the highlighted suggestion, select the  icon.
 - To remove the highlighted suggestion, select the  icon.
- c. To save the selected suggestions, use the **Save** button.
 - d. To save and publish the selected suggestions, use the **Save & publish** button.

Creating Suggestions

Create suggestions actually means requesting the AI-ML component to provide segment suggestions based on our inputs.

About this task

To request segment suggestions, complete the following steps:

1. Navigate to **Marketing Central > Segment Central**

Result
The **All Segment** page opens.
2. Click **Suggestions**.

Result
The **Segment suggestions** page opens listing the recent request(s) and results.
3. Click **+ Suggestions**.

Result
The **Suggest segments** page opens.
4. Select the required values for the following fields:
 - For the **Select audience** field, select the required audience level.
 - For the **Select table** field, select the required base table for extracting data.

- For the **Select columns** field, select the required fields to make clusters. AI-ML generates audience segments using the selected columns or features ignoring the unselected columns. Use the search bar to locate the required columns. The selected columns appear in the **Selected column(s) & filter(s)** section.



Note: Avoid using columns that have unique values in it as the suggestions will not be proper if you select column with unique values. Also, AI-ML component cannot establish a pattern using columns with unique values.

5. Provide and **Minimum** value and a **Maximum** value for the segment size.



Note: The AI-ML component will provide results that are equal to or more than the **Minimum** value but the results may be more **Maximum** value.

6. To add additional filters for each selected column from *Step 4*, in the **Selected column(s) & filter(s)** section, select a column and perform the following steps:
 - a. The **Configure filter(s): <column-name>** panel appears.
 - b. Toggle the required condition to **AND** OR **OR**.
 - c. To add a filter, click **Add**.
 - d. Select the relevant **Field**, **Condition**, and **Value(s)** to create a filter.
 - e. Click **Add** to add more filters. You can add up to three filters. Click **X** to remove a filter.
 - f. Click **Apply** to save the filters.
 - g. If required, add filters to the other selected columns by performing Step 6-a through 6-g.
7. Click **Show**.

Working with the results from Suggestions

After requesting for Suggestions in Segment Central, by default, the last 10 requests are listed in the **Recent request(s)** section.

Before you begin

See [Creating Suggestions on page 13](#).

1. In the **Recent request(s)** section, highlight the recently requested Suggestion.

Result

The results appear in the right side of the **Recent request(s)** section.



Note: Suggestions offered are based on the audience data existing at the time of the request. Subsequent modifications to the underlying audience dataset will not alter the result provided. Executing the test run again on previously suggested segments may yield varying counts, as the system always considers the most recent dataset for the Test Run. Duplicate and submit a separate request if you need updated suggestions.

2. If the resultant graphs has:

-  color, it means that the suggestions contain the provided segment size.
 -  color, it means that the suggestions exceed the **Maximum** value of the provided segment size.
3. If required, you can modify the results in individual graphs by adding more rules. To modify a result, perform the following steps:
- a. Decide on the suggestion you want to modify and select the  icon on that suggestion.
 - b. Select the  icon.
 - c. Use the **OR/AND** toggle switch to configure the condition.
 - d. Select **Add rule** to add a rule or select **Add group** to add a rule group. Select **X** to remove a rule or a rule group.
 - e. To see the results after adding the rules, click **Test run**.
If you are satisfied with the results, you can save the result as a segment or save and publish it.
 - f. To save the result, or to save and publish as a segment, complete the following steps:
 - i. Provide a **Segment name** (mandatory).
 - ii. Provide a **Description** (optional).
 - iii. Use **Browse** to locate the required folder to save the segment (mandatory).
 - iv. Select an appropriate **Security policy** (mandatory).
 - v. Enter an appropriate **Usage category** and click **Add** (optional).
 - vi. To just save the result as a segment, click **Save**. To save the result as a segment and to publish the segment, click **Save & publish**.
4. You can save the result or multiple results as a segment or segments. You can also save and publish the result or multiple results as a segment or segments.
- a. **Saving a result or saving and publishing a result as a segment**
 - i. In the **Segment suggestion(s)** page, select the checkbox of the required result and click **Save** or **Save & publish**.
 - ii. The **Save segment** panel appears. Provide the following values:
 1. Provide a **Segment name** (mandatory).
 2. Provide a **Description** (optional).
 3. Use **Browse** to locate the required folder to save the segment (mandatory).
 4. Select an appropriate **Security policy** (mandatory).
 5. Enter an appropriate **Usage category** and click **Add** (optional).
 6. To save the result as a segment, or to save the result as a segment and to publish the segment, click **Save**.
 - b. **Saving multiple results or saving and publishing multiple results as segments**
 - i. In the **Segment suggestion(s)** page, select the checkboxes of the required results and click **Save** or **Save & publish**.
 - ii. The **Save segment(s)** panel appears. Provide the following values:

1. Provide a **Segment name** (mandatory). The name that you provide here will act as a placeholder for the various segments created.
2. Provide a **Description** (optional).
3. Use **Browse** to locate the required folder to save the segment (mandatory).
4. Select an appropriate **Security policy** (mandatory).
5. Enter an appropriate **Usage category** and click **Add** (optional).
6. To save the results as segments, or to save the results as segments and to publish the segments, click **Save**.



Note: When you save or save and publish multiple suggestion results as segments, the **Segment name** will act as a placeholder for the various segments and each segment will be appended with a number in the filename to distinguish the various segments. **Example:** If you select three suggestion results to save or save and publish as segments, and for the **Segment name** field, if you provide the value `sample-suggestion`, the three segments will be named `sample-suggestion-1`, `sample-suggestion-2`, and `sample-suggestion-3`.

5. When the success message for segment(s) creation appears, click View segment(s) to view the created segment(s).

Chapter 11. 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 12. 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 scedules 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 scedules 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 schdue 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*.