



Siebel Marketing Installation and Administration Guide

Version 8.0

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ORACLE®

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1

What's New in This Release

What's New in Siebel Marketing Installation and Administration Guide, Version 8.0

Table 1 on page 7 lists new features described for this version of the documentation to support release 8.0 of the software.

Table 1. New Features in Siebel Marketing Installation and Administration Guide, Version 8.0

Topic	Description
Siebel Marketing Installation and Administration Guide	<p>This guide has been updated to reflect release 8.0 product name and user interface changes. For more information about changes to the user interface, see <i>Siebel Fundamentals</i>.</p> <p>The Siebel Analytics platform has been renamed Oracle Business Intelligence Enterprise Edition (BI EE). If you are using a version of Siebel Analytics that is greater than version 7.8.x, you will find information about Siebel Analytics is referenced as Oracle Business Intelligence in the Oracle BI Enterprise Edition v10.1.3.x or higher documentation set. Siebel Analytics references have not been changed in this guide.</p>
Enabling Component Groups for Siebel Marketing on page 12	Added the workflows Promote Prospect (Many) and Promote Prospect (Single) to Table 2, <i>Component Groups and Components Required for Marketing</i> .
Configuring the Marketing Approval Process on page 20	Added Marketing Fund to Table 4 list of Business Components With Approval Process.
Guidelines for Testing the Marketing Module in an Integrated Environment on page 28	Updated the procedure, <i>To test the campaign load</i> .
Managing Marketing Defaults on page 44	Describes new default system parameters - Default List Export File Format and Default Saved Result Set File Format - for the Marketing Defaults page.
Configuring the System for New System Data Expressions on page 62	Describes how to add System Data Expressions in addition to those installed automatically.
System Data Expressions Used in List Format Elements on page 63	Added System Expression for Treatment ID to Table 11, <i>System Data Expressions Used in List Format Elements</i> .

Table 1. New Features in Siebel Marketing Installation and Administration Guide, Version 8.0

Topic	Description
List Format Types and Valid System Data Expressions on page 64	Added Treatment ID to Campaign Load and List Export in Table 12, <i>List Format Types and Valid System Data Expressions</i> .
Creating and Testing Campaign Load Formats on page 77	Added Treatment ID to Step 5b in procedure, <i>To create a campaign load format and add columns</i> ; to Step 5 of procedure <i>To enable system data expressions for required columns</i> .
Testing Campaign Load Formats on page 82	Added Treatment ID to the list of required columns for Campaign Load Format in Step 2 and added new tasks as Step 6 and Step 7a of procedure, <i>To test your campaign load mapping</i> .
Setting Up the HTML Editor for Automatic Uploads of Graphics on page 108	Describes how to set up the HTML editor so that it automatically upload graphics to the Web server when a new graphic is added to an HTML document by the user.
Field Names for Marketing Integration Components on page 186	Updated Table 27, <i>Field Names for Marketing Integration Components</i> to include Treatment ID component and field name.

Release Considerations

In this release, the Offer object model has been modified to distinguish between an *Offer* and a *Treatment*. An offer is a new parent object that represents a cross-channel proposition to your customers. Channel-specific objects such as *email offer* or *phone offer* from previous releases have been renamed as *email treatment* or *telephone treatment*.

There are several upgrade considerations related to this change:

- Offer records that were entered in a previous version of the application are preserved. However, the label for these records changes from Offer to Treatment. For example, an email offer is now called an email treatment. During the upgrade process, a new parent offer is automatically created for each existing offer that is relabeled as a treatment.
- For campaigns entered in a previous version of the application, the existing campaign history records (stored in S_CAMP_CON) are updated with the primary treatment for the campaign. If you typically create a single offer for each campaign, this update helps to make sure that pre-upgrade campaign history conforms to your usage in the new Siebel campaign process.
- The Marketing Campaign Load, Marketing Campaign Launch, and Marketing Wave Launch workflow processes have been updated to accommodate this enhancement. If your organization has configured or customized these workflows in a previous version of the application, then you need to investigate and resolve any differences.

- The allocation of segments and segment trees to treatments has been moved from the program stage level to the campaign level. This allows you to target several lists or segments with multiple treatments in the same campaign. There are some upgrade considerations that are related to this enhancement:
 - The relationship between segments and segment trees that were previously allocated is preserved. If you have established a relationship between a segment tree cell and a campaign, the segment tree is associated with the campaign during the upgrade process. The process then allocates the segment tree cells to the primary treatment for the campaign, so that allocations are preserved.
 - A campaign is now treated as a direct child of a program. Stages can still be used to create a program flow, however the stage is now an optional attribute of a campaign, rather than the parent of the campaign.

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Installing and Administering Siebel Marketing

This chapter describes how to install and administer Oracle's Siebel Marketing product in a Microsoft Windows environment. It includes the following topics:

- [Installing Siebel Marketing on page 11](#)
- [Enabling and Synchronizing Marketing Server Components on page 12](#)
- [Activating and Deactivating Marketing Workflow Processes on page 14](#)
- [Updating Marketing Connection Settings on page 15](#)
- [Enabling Automatic Responses for Opportunities and Orders on page 20](#)
- [Configuring the Marketing Approval Process on page 20](#)
- [About Load Balancing and Global Deployment of Siebel Marketing on page 23](#)
- [About Marketing Responsibilities and Access Groups on page 24](#)
- [Creating Marketing Seed Data on page 27](#)
- [Guidelines for Testing the Marketing Module in an Integrated Environment on page 28](#)
- [Monitoring Marketing System Tasks on page 32](#)
- [Importing Marketing iHelp Files from the Demo Database on page 33](#)

Installing Siebel Marketing

A Siebel Marketing installation has two main parts. You can install the following parts in any sequence.

- (Required) The Siebel Marketing operational application. Includes Siebel Server.

For more information about installing Siebel Server components, see the *Siebel Installation Guide* for the operating system you are using. For information about Web servers and operating systems supported by Siebel Marketing, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

CAUTION: If you are upgrading an existing Marketing installation, see the *Siebel Database Upgrade Guide*.

- (Optional) Analytics Server components that provide segmentation and list generation capabilities.

For more information about installing the Marketing module, see [“Installing and Administering Segmentation and List Generation” on page 35](#).

Enabling and Synchronizing Marketing Server Components

During Siebel Server installation and configuration, you must enable the server components required by Siebel Marketing. Check the status of the Siebel Server component groups using the Component Groups view in the Administration - Server Configuration screen. The Component Groups view is a list of installed Siebel Enterprise Server component groups with their associated components, servers, and tasks. For more information about enabling component groups, see the *Siebel Installation Guide* for the operating system you are using.

Enabling Component Groups for Siebel Marketing

You must make sure component groups are enabled. The server assigned to the selected component group appears in the Servers view tab.

To enable component groups

- 1 Navigate to Administration - Server Configuration screen > Enterprises > Component Groups view.
- 2 In the Enterprise Servers list, select the appropriate server.
- 3 In the Enterprise Component Groups list, verify the required component groups have been enabled by performing the following steps:
 - a Locate each of the required component groups using [Table 2 on page 12](#) as a guide.
 - b Identify optional server components you may need to enable from the following list:
 - Assignment Manager. Used for campaign member assignment.
 - Data Quality Manager. Identifies duplicate contacts, accounts, and prospects during List Import.
 - c If the Enable State field does not contain the value Enabled, select the component group, click the menu button, and choose Enable Component Group.

Table 2. Component Groups and Components Required for Marketing

Group Name	Components	Description
CommMgmt	<ul style="list-style-type: none"> ■ Communications Outbound Manager ■ Communications Session Manager ■ Communications Configuration Manager 	Communications Management. Delivers outbound wireless and fax offers for campaigns.
MktgOM	<ul style="list-style-type: none"> ■ Marketing Obj Mgr ■ eMarketing Obj Mgr ■ eEvents Obj Mgr 	Marketing Component Group. Supports the user interface and business objects for the Marketing application.

Table 2. Component Groups and Components Required for Marketing

Group Name	Components	Description
MktgSrv	<ul style="list-style-type: none"> ■ List Import Service Manager 	Marketing Server. Used for list management list import.
System	<ul style="list-style-type: none"> ■ Siebel Connection Broker ■ Server Request Processor ■ File System Manager ■ Server Tables Cleanup ■ Server Manager ■ Server Request Broker 	Supports general server management.
Workflow	<ul style="list-style-type: none"> ■ Workflow Process Manager ■ Workflow Process Batch Manager ■ Workflow Action Agent ■ Workflow Recovery Manager ■ Workflow Monitor Agent ■ Generate Triggers ■ Promote Prospect (Many) ■ Promote Prospect (Single) 	Executes required marketing workflow processes.

Synchronizing Component Groups

After enabling server component groups, you must synchronize (enable) the server configuration.

To synchronize component groups

- 1 Navigate to Administration - Server Configuration screen > Enterprises > Component Groups view.
- 2 In the Enterprise Servers list, select the appropriate server.
- 3 Click the Synchronize view tab and click Synchronize.

You do not have to select any components in this view. The synchronization task may take a few minutes.

Stopping and Restarting the Siebel Server

The Siebel Server must be restarted each time synchronization occurs.

To restart the Siebel Server process using Microsoft Windows

- 1 In the Microsoft Windows Control Panel, click the Services icon to open the Services window.

- 2 Locate Siebel Server and click Stop.
- 3 Click Start.

Activating and Deactivating Marketing Workflow Processes

The Siebel Marketing application requires a group of workflow processes to support various functions. Workflow processes must be activated before you can use them. When activated, the workflow process Status field contains a value of Active. For more information about activating or deactivating workflows, see *Siebel Business Process Framework: Workflow Guide*.

CAUTION: The procedure for activating a workflow has changed. You must deploy workflows in Siebel Tools and then activate workflows before you can use them. For more information, see the section about upgrade planning for Siebel Workflow Designer in the Upgrade Guide for the operating system you are using.

Activating Workflow Processes

Table 3 on page 14 contains a list of workflows required for the Siebel Marketing application. To activate a workflow process, use the instructions for deploying workflows in *Siebel Business Process Framework: Workflow Guide*.

NOTE: Before attempting to use Siebel Marketing, make sure that you activate version zero (0) of every workflow in Table 3 on page 14, and then restart the Workflow Process Manager Component (or Siebel Server).

Table 3. Workflow Processes Required for Siebel Marketing

Workflow Name	Group	Description
Analytics Data Load	Marketing	Loads data through EAI for Customer Synchronization or Analytics Data Load requests
Campaign Copy	Marketing	Applies a campaign template
Email Marketing - Forward to Friend	Marketing	Sends new emails to forward recipients
Email Marketing - Update Status	Marketing	Updates the delivery status of an email offer
Generate Source Code	Marketing	Generates source codes for a campaign
Import Marketing Contact	Marketing	Subprocess for Marketing Campaign Load
List Export	Marketing	Requests list files to be generated by the Marketing module
List Export (Internal)	Marketing	Generate list files for sending email offers using basic mode.

Table 3. Workflow Processes Required for Siebel Marketing

Workflow Name	Group	Description
List Purge	Marketing	Purges prospects from an internal list
Marketing Approval Process	Marketing	Routes marketing approval items
Marketing Campaign Launch	Marketing	Launches one or more campaign waves
Marketing Campaign Load	Marketing	Loads segment or list members into a campaign
Marketing Stage Execution	Marketing	Scheduled execution of a program stage
Marketing Wave Launch	Marketing	Subprocess for Marketing Campaign Launch
Program Copy	Marketing	Applies a program template
Promote Prospects - Many	Marketing	Promotes multiple prospects to customers.
Promote Prospects - Single	Marketing	Promotes a single prospect to a customer.

Updating Marketing Connection Settings

After you complete the Analytics installation, perform the following tasks:

- [Connecting the Siebel Server to the Analytics Web Server on page 15](#)
- [Confirming Host and Symbolic URL for the Marketing Module on page 17](#)
- [Create Permissions on page 18](#)
- [Setting Up the Marketing File System on page 18](#)
- [Setting Universal Time Option \(UTC\) on page 19](#)

Connecting the Siebel Server to the Analytics Web Server

For segmentation and list generation, you must connect the Siebel Marketing operational application (on the Enterprise Siebel Server) to the Analytics Web Server. To connect to the Analytics Web Server, you must change the User ID and Password fields to the default login for the Analytics Web Server that you plan to use. This login is the user ID that is used to authenticate requests to the Marketing module.

You must perform this setup to make sure that Siebel Server can communicate to Analytics Server during program and campaign design, campaign load, list generation, and campaign launch. For example, when a user submits a request for campaign load or list generation, the requests to the Marketing module use this login for impersonation when the user's password is unavailable.

Impersonation is used to authenticate a user, allowing access to the Analytics Web Server when the user's password is unavailable. The default login is used to authenticate and create a session, and then the login Id is changed to the user Id of the person who submitted the request. Impersonation is essential to enforce appropriate visibility to Analytics Web catalog objects, Analytics metadata, and actual user data from various data sources, based on the User Id of the person who submitted the request.

NOTE: Passwords are encrypted for new server records. To encrypt the password for existing server records, select the record and reenter the password.

To change the user ID and password to the Analytics Web Server login

- 1 Log in to the Marketing application as the administrator.
- 2 Navigate to Administration - Marketing screen > Servers.
- 3 In the Servers list, query for Name = Default Analytics Web Server.
The Type field must be Siebel Analytics Web Server.
- 4 Scroll down to the Parameters list.
- 5 In the Parameters list, click Authentication Service (SAWSessionServiceSoap) and perform the following steps:
 - a In the Outbound Web Services view, in the Service Ports list, change the first part of the address (default value is CHANGEME) to match the server name and domain of your Siebel Analytics Web Server running the Marketing module.

The address needs to be the full path name. For example, if your Marketing Server is named MarketingServer1, the full address for the JobManagementService would be the following:

`http://MarketingServer1/analytics/saw.dll?SoapImpl=jobManagementService.`
 - b Click the back button in the browser window.
- 6 In the Parameters list, click Catalog Service (WebCatalogServiceSoap) and perform the following steps:
 - a In the Outbound Web Services view, in the Service Ports list, change the first part of the address (default value is CHANGEME) to match the server name and domain of your Siebel Analytics Web Server running the Marketing module.
 - b Click the back button in the browser window.
- 7 In the Parameters list, click Job Execution Service (JobManagementServiceSoap) and perform the following steps:
 - a In the Outbound Web Services view, in the Service Ports list, change the first part of the address (default value is CHANGEME) to match the server name and domain of your Siebel Analytics Web Server running the Marketing module.
 - b Click the back button in the browser window.
- 8 Click Clear Cache.

Restarting the Siebel Server is not required for this change to be effective.

Confirming Host and Symbolic URL for the Marketing Module

Perform this task so that users can display the Segment Designer and Segment Tree Designer in the Segments screen tab and the List Format Designer in the Administration - Marketing screen tab.

- 1 Log in to the Marketing application as the administrator.
- 2 Navigate to the Administration - Integration screen > WI Symbolic URL List view.
- 3 In the Administration - Integration screen, from the visibility filter, select Host Administration.
- 4 In the Host Administration list, query for Virtual Name = NQHOST and verify that a record with the Name field = [NQHOSTName] appears.
- 5 In the Name field, change [NQHOSTName] to the Analytics Web Server name that you plan to use.

CAUTION: Be sure to change the Name column, not the Virtual Name column. Also, make sure that you have not included brackets in the name.

TIP: This server name must be unique. For example, if you assign a server name to your Analytics Web Server and try to use the same server name for Siebel Intelligence Dashboards, you receive a unique name error. To prevent this, you can append the domain to the server name (for example, yourserver.yourdomain.com) or use the IP address in place of the name.

- 6 From the visibility filter, select Symbolic URL Administration.
- 7 In the Symbolic URL Administration list, query for Web Application name = Marketing Segmentation and verify that records with the following Name field values appear:
 - MarketingEditListFormat
 - MarketingEditSegment
 - MarketingEditSegmentTree
 - MarketingListFormatsEntry
 - MarketingSegmentsEntry
 - MarketingSegmentTreesEntry
- 8 Scroll down to the Symbolic URL Arguments list and verify that each Web application resulting from your query in [Step 7 on page 17](#) have the correct nqUser and nqPassword argument.

For each Web application, perform one of the following steps:

- a To allow each user to connect using their username and login, perform the following steps:
 - In the Symbolic URL Arguments list, Set the nqUser argument ArgumentType = Command and Argument Value = UseSiebelLoginId.
 - Set the nqPassword argument to ArgumentType = Command and Argument Value = UseSiebelLoginPassword.
- b In the Symbolic URL Arguments list, to connect using a fixed username and login for all users, perform the following steps:

- ❑ Set the nqUser argument to ArgumentType = Constant and Argument Value to the shared login for the Marketing module.
- ❑ Set the nqPassword argument ArgumentType = Constant and Argument Value to the shared password for the Marketing module

NOTE: After changing settings for any Web service or symbolic URLs, be sure to log out of the browser session and log in again for the changes to take effect.

Create Permissions

In Siebel Analytics Web Server, grant marketing permissions to the marketing administrators. For more information, see *Siebel Analytics Server Administration Guide*.

Setting Up the Marketing File System

To prevent problems with campaign loading, make sure that the Analytics Web Server service and Siebel Server service are running on an admin account that has read and write access to the directories used by the Marketing File System. In Windows, these services default to running under the localsystem account, which can not access the Marketing File System because it is not a recognized user across the network.

For segmentation and list generation, access to the Marketing File System is shared between the Siebel Server and the Analytics Web Server. If the Siebel Server and Analytics Web Server are installed on a combination of UNIX and MS Windows operating systems (heterogeneous environment), the Marketing File System must be configured for sharing across environments.

Enable File Sharing in Mixed Environments

Siebel Marketing can be installed and operated in environments that use a combination of UNIX and Windows operating systems, but with some restrictions. The server components that use the Marketing File System must be on the same operating system, otherwise the difference in path name syntax prevents them from finding files. Analytics Web Server must have visibility and write permissions to the Marketing File System. In a mixed (heterogeneous) environment, you may have to run a third-party application such as Samba to access the Marketing File System across different platforms.

Analytics Web Server uses the MarketingFileSystem parameter to identify the location to which it writes out generated list files. This parameter on the Analytics Web Server points to the same path as the Marketing File System parameter on the Marketing Component Group. However, the path syntax must correspond to the platform on which the Analytics Web Server is running.

For example, you may have the following configuration:

- Siebel Server and the Marketing File System run on UNIX. The Marketing File System may be located at /export/home/fil esystem on the Siebel Server (sdcn1125s031).
- The Analytics Web Server may be running on MS Windows.

You could export this file system path to be visible on MS Windows by running a third-party application such as Samba on the UNIX machine. In this example, the parameters would be set as shown in the following list:

- The Marketing File System parameter on the Siebel Server could be set to:
/export/home/filessystem
- The MarketingFileSystem configuration parameter on the Analytics Web Server must be set to:
\\<server>\export\home\filessystem

The following server components must run on the same operating system:

If the Communications server component and the Workflow server component are not on the same operating system, you must change the Marketing File System server parameter for the Communications Outbound Manager server component. This enables the workflow process manager component to use the path syntax that corresponds to the operating system on which the Communication Outbound Manager is running.

Setting Universal Time Option (UTC)

The time zone of the operating system on the Siebel Server machine can be set to any zone. However, the time must be synchronized with the database server. For example, if the time on the database server is 10:00 PM GMT, the Siebel Server machine would show a time of 2:00 PM (PST) or 4:00 PM (CST). To compensate for Siebel Servers and a database that are in different time zones, the Universal Time Option parameter is enabled to specify that server tasks are submitted in reference to a Universal Time. You must set this option to TRUE when deploying your Siebel application globally because global deployments typically have some Siebel Servers in a different time zone from the Siebel transactional database. If your implementation does not span time zones, this setting is optional.

NOTE: If your Marketing Server requests do not run and remain in Queued status, then you may have a UTC issue. Please repeat each step in this task to verify your settings.

To set the universal time option

- 1 Navigate to Administration - Application screen > System Preference.
- 2 In the System Preference Name field, query for Universal Time Coordinated, and perform one of the following steps:
 - To use the universal time option, in the System Preference Value field, set the value to TRUE.
 - To disable the universal time option, in the System Preference Value field, set the value to FALSE.
- 3 Verify that the operating system Clock and Time Zone on the Database Server machine is set to (GMT) Greenwich Mean Time.
- 4 Synchronize the time on the Siebel Server machine with the time on the database server machine.
- 5 Restart the Siebel Server to make your change effective.

Enabling Automatic Responses for Opportunities and Orders

Responses can be created automatically when you associate a campaign with an order, associate a campaign as a source for an opportunity, or create an opportunity using the Create Oppty button in the Campaign screen. By default, the user properties for automatic response creation are disabled.

To enable automatic response creation in the Orders, Opportunities, and Campaigns screens, perform the following tasks in Siebel Tools:

- **Orders screen.** Set the User property Create Auto Response Service to Y in the Order Entry - Orders business component. When you enable this service, a response is created for the primary contact for the order whenever a campaign is associated with the order.
- **Opportunity screen.** Set the User property Create Auto Response Service to Y in the Opportunity business component. When you enable this service, a response is created for one of the opportunity contacts whenever a campaign is associated as a source with the opportunity.
- **Campaigns screen, Contacts/Prospects view tab.** Enable the Create Oppty button in this view tab by setting the User property Create Auto Response Service to Y in the Opportunity business component. When you enable this service, a response is created automatically whenever the user clicks the Create Oppty button in the Campaign screen.

Configuring the Marketing Approval Process

Siebel Marketing provides the ability to submit a variety of marketing items for review and approval using the Marketing approval process. Marketing plans, budget requests, programs, campaigns, event plans, and offers can be submitted from one employee to another by changing the Approval Status field on any of these objects.

The approval process is integrated with the Universal Inbox, so that marketing items that are submitted for review or approval, also appear in the Universal Inbox for the user who sent or received the item.

In the standard configuration, a change in the approval status opens a dialog box so the user can select the recipient employee and add a comment. When the user clicks Send, the Marketing Approval Process workflow creates a Universal Inbox Item task for the recipient employee and updates the approval history with the approval status value and any comments made by the recipient.

[Table 4 on page 20](#) contains a list of the business components for which the approval process is enabled.

Table 4. Business Components With Approval Process

Business Component Name
Campaign
Direct Mail Offer

Table 4. Business Components With Approval Process

Business Component Name
Direct Sales Offer
eEvents Parent Event
Email Offer
Fax Offer
Indirect Offer
Marketing Budget Requests
Marketing Fund
Marketing Plans
Offer
Phone Offer
Program Container
Web Offer
Wireless Offer

Modifying the Approval Values

The standard configuration provides the following lists of values (LOVs):

- **Approval Status.** The values from this LOV appear in the Approval Status field that appears in the Marketing Plans, Budget Requests, Programs, Campaigns, Event Plans, and Offers screens.
- **Action.** The values from this LOV appear in the Action field in the Universal Inbox applets and the Approval view tab of the Marketing Plans, Budget Requests, Programs, Campaigns, Event Plans, and Offers screens. Action values are automatically mapped to Approval Status values. For example, when a user chooses an Approval Status value of Needs Revision in one record the Action value is updated to Request Revision in the corresponding Universal Inbox record. [Table 5 on page 21](#) shows the preconfigured mapping for these values.

Table 5. Values for Approval Status and Action LOVs

Approval Status	Action	Description
(blank)	Not Yet Submitted	This field is blank until a value is selected.
Approved	Approve	Approval Last Point. No further action is required by user.
Declined	Decline	Approval Last Point. No further action is required by user.

Table 5. Values for Approval Status and Action LOVs

Approval Status	Action	Description
Needs Revision	Request Revision	Requires action by the user until an Approval Last Point is selected.
Submitted	Submit	Requires action by the user until an Approval Last Point is selected.

If required, you can add to the list of values using the Administration - Data screen. If you add a value that you want to be an Approval Last Point, you must identify the new value as an Approval Last Point in Siebel Tools.

To add a new approval value and map the LOVs

- 1 Navigate to Administration - Data screen > List of Values.
- 2 In the List of Values list, query for the MKTG_PLAN_APPR_TYPE list of values and perform the following steps:
 - a Click New and complete the fields.
 - b You must complete the Display Name, Language Name, and Order fields, and then select the Active flag.

NOTE: Use a unique value in the Order column in this list. This controls the sequence that the items appear in the drop-down list.
- 3 Query for the MKTG_UINBOX_ACTION_TYPE list of values and perform the following steps:
 - a Click New and complete the fields.
 - b You must complete the Display Name, Language Name, and Order fields, and then select the Active flag.

NOTE: Set the order value in this list to control the sequence that the item appears in the drop-down list.

To identify a new Approval Last Point value

- 1 Login to Siebel Tools and query for the business component for each marketing approval item. For a list of supported business components, see [Table 4 on page 20](#).
- 2 For each business component, select the Business Component User Properties.
- 3 Select the Approval Last Point user property.
- 4 Add the new value to the comma separated list.

CAUTION: Do not change the existing values (Declined and Approved). You must insert your value *<your new value>* as an additional value.

If your organization does not want this Approval dialog box to appear when the Approval Status changes, you can disable it.

To disable the Approval dialog box

- 1 Log in to Siebel Tools.
- 2 Find the base Business Component for which you want to disable the popup. For a list of supported business components, see [Table 4 on page 20](#).
- 3 Select the Business Component User Properties.
- 4 Select the Show Approval Popup user property and change the value to No.

About Load Balancing and Global Deployment of Siebel Marketing

For information about load balancing server requests within the Siebel Enterprise, see *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

Isolating Marketing Workflow Processes

Marketing workflow processes can be resource intensive during peak usage or large jobs. You may need to isolate marketing-related workflows from other workflow requests in the Enterprise by directing marketing requests to a specific instance of the Workflow Process Manager. If you need to do this for marketing workflow processes, you must replicate the Workflow Process Manager component and change the enterprise parameter so that it points to the new component.

To create a new Marketing workflow process manager component

- 1 Navigate to Administration - Server Configuration screen > Enterprises > Component Definitions view.
- 2 In the Component Definitions list, query for the Workflow Process Manager component.
- 3 From the list menu, choose Copy Record.
- 4 For the copied component, enter a new component name such as Workflow Process Manager - Mktg in the Name field.
- 5 Enter a new alias such as WfProcMgrMktg in the Alias field.
- 6 Change the Enable State field to Enable.
- 7 In the Enterprises screen, select the Parameters view.
- 8 In the Enterprise Parameters list, query for the parameter named Marketing Workflow Process Manager.
- 9 In the Value field, change the value to the alias name of the new component that you just created.

For example if the component name is Workflow Process Manager - Mktg and the alias name is WfProcMgrMktg, then the enterprise parameter name is WfProcMgrMktg.

About Marketing Responsibilities and Access Groups

This section contains the following topics:

- [About Marketing Responsibilities on page 24](#)
- [Modifying Privileges for Marketing Access Groups on page 25](#)
- [Assigning Marketing Users to Access Groups on page 26](#)

About Marketing Responsibilities

Siebel Business applications provide a set of Marketing responsibilities that contain the full set of active views. These responsibilities are divided into core responsibilities and add-on responsibilities.

- **Core responsibilities.** Base user responsibilities that serve as a starting point for any Marketing user. Typically, a user has only one core Marketing responsibility from this list. The following is a list of core responsibilities:
 - Campaign Administrator
 - Campaign Agent
 - Events Manager
 - Marketing Executive
 - Marketing Planning Manager
- **Add-on responsibilities.** Support additional modules that certain users may need depending on their job description. These responsibilities are intended to be added to a core responsibility. They do not include common screens such as Accounts and Contacts because a core responsibility provides these screens. Because these are added to core responsibilities, you can assign a user multiple add-on responsibilities.

The following is a list of add-on responsibilities:

- Marketing Admin
- Marketing Analytics User
- Marketing Program Manager
- Segmentation User
- Web Marketing User

The Segmentation User responsibility is used for Analytics integration. Any user that needs to access the Segment Designer or List Format designer must have this responsibility. Also, make sure that the same responsibility is associated to the segmentation catalog and other marketing server metadata in the Analytics repository.

TIP: If you create custom views, you may want to create new add-on responsibilities for these views, instead of adding these views to the standard responsibilities. During future upgrades, this helps you identify custom views that you created.

Modifying Privileges for Marketing Access Groups

Siebel Marketing restricts the use of some buttons in the user interface (and their underlying methods) to those users assigned to Marketing access groups. This makes sure that unauthorized users cannot perform functions that they are not trained to perform. Marketing Access Groups can be used to restrict use of any button or menu item on any applet.

Siebel Marketing provides the following preconfigured access groups:

- Marketing Administrators
- Marketing Managers
- Marketing Users

Table 6 lists the functionality available to each access group.

Table 6. Functionality Available to Each Access Group

Functionality	Marketing Administrators	Marketing Managers	Marketing Users
Analytics Data Load (Activate and Deactivate)	X		
Generate Output List	X	X	X
Generate Source Code	X	X	
Launch Campaign	X	X	X
Launch Wave	X	X	X
Load Campaign	X	X	X
Load History Applet > Delete Record	X		
Purge Load	X		
Run Assignment Manager	X		
Save As Template	X	X	
Suspend Wave	X	X	
System Task List Applet > Delete Record	X		
Test Offer	X	X	X

To modify the Marketing access privileges for an applet

- 1 Login to Siebel Tools.
- 2 In the Object Explorer, select Applets.
- 3 Select the applet, such as Campaign Execution Status List Applet, for which you want to modify access.

- 4 In the Applet User Properties, in the Marketing Access Group user property, add or delete access groups. Use the following syntax for each user property entry:

Name	Value
Marketing Access Group <n>	"<method name>", "<access group 1>", "<access group 2>", and so on

NOTE: N is an integer such as 0, 1, 2, and so on, for each method to be restricted.

For example, the Campaign Execution Status List Applet has the following user properties in the standard repository:

Name	Value
Marketing Access Group 0	"PromptPurgeLoad", "Marketing Administrators"
Marketing Access Group 1	"PromptSuspendWave", "Marketing Administrators", "Marketing Managers"
Marketing Access Group 2	"PromptLaunchWave", "Marketing Administrators", "Marketing Managers"

- 5 To add or remove an access group for a specific method, add or remove the access group name from the comma separated list in the user properties.

If required, you can create additional access groups for your organization.

To create a new Marketing access group

- 1 Navigate to Administration - Groups screen > Access Groups.
- 2 In the Access Groups list, click New.
- 3 In the new record, enter an Access Group name and, from the Type drop-down list, select Access Group.
- 4 Review the applets in the application for which you want to enable or disable a button, menu item, or other control that invokes a method.
- 5 For each applet, modify the applet user properties to refer to the new access group.

Assigning Marketing Users to Access Groups

You must perform this setup task to make sure your Marketing users have access to the appropriate functionality. You assign the users to access groups based on the position of each user. For more information about access groups, see *Siebel Security Guide*.

To assign Marketing users to access groups

- 1 Navigate to Administration - Group screen > Access Groups.

- 2 In the Access Groups list, in the Name field, query for Marketing*.
NOTE: At least two access groups (Marketing Administrators and Marketing Managers) appear.
- 3 In the Access Groups list, select Marketing Administrators.
- 4 In the Party list, add the positions for your administrators.
For example, Siebel Administrator and Marketing Administrator positions.
- 5 In the Access Groups list, select Marketing Managers.
- 6 In the Party list, add the positions for your marketing managers.
For example, Marketing Analysts, Program Managers, and so on.
NOTE: You must add positions as access group members, not User List or Organization.
- 7 Restart the client for this change to be effective.

Creating Marketing Seed Data

After you install the Marketing application, there are some optional seed data that can be created to support various business processes. This section contains the following topics:

- [Creating Marketing Regions on page 27](#)
- [Creating Marketing Activity Templates on page 28](#)
- [Creating and Using Marketing Activity Plans on page 28](#)

Creating Marketing Regions

Marketing regions provide a way to organize the marketing plans and tactics in your organization. Additionally, using regions can generate more detailed Marketing reports and rollups in Siebel Analytics.

You can define marketing regions according to any set of parent child relationships that you require. Although there is no limit to the number of layers you can create in your hierarchy, marketing analytics only supports a hierarchy that is a maximum of 10 layers deep. You can implement a marketing region hierarchy by making one region the child of another region. The following example shows a simple regional hierarchy:

Worldwide
 North America
 EMEA
 Latin America
 Asia Pacific

To create marketing regions

- 1 Navigate to Administration - Location screen > Regions.

- 2 In the Regions list, create a new record.
- 3 Enter the Region name and description.
- 4 Be sure to set the Type as Marketing Region.
- 5 If this region is a child of another region, select the Parent Region in the Parent Region field.
- 6 Save the record.
- 7 Repeat [Step 2 on page 28](#) through [Step 6 on page 28](#) for each region in the hierarchy.

Creating Marketing Activity Templates

Activity Templates provide a convenient way for users to quickly assign a set of milestones and activities to a program or campaign. For instructions about how to create activity templates, see *Siebel Applications Administration Guide*. For instructions about updating Activity Templates from prior releases, see the activity plan topic in the *Siebel Database Upgrade Guide*.

NOTE: When you create Marketing activity templates, be sure to set the type of the template to the name of the main marketing business components, for example Program Container and Campaign.

Creating and Using Marketing Activity Plans

Activity Plans associate preconfigured planning and milestone activities and tasks with a template (activity plan). Users can assign the templates to marketing programs and campaigns. This creates one or more activities that are associated with a campaign or a program.

NOTE: Activities are not created for contacts that are loaded into a campaign.

Activity Plans may be designed to help you plan the marketing program or campaign or execute it. Before you link an activity plan to your campaign, you must create activity templates or customize existing templates to reflect your business process and needs. Use templates to define a generic set of activities that may be reused.

For example, a marketing department production manager may design an activity plan template called Direct Mail that contains regularly scheduled campaign planning activities (meetings with creative or budgetary staff) and start tasks (such as generating an export list according to segmentation criteria). Using the Campaign Activity Plans view the manager can associate the activity plan template to the current campaign and then assign resources, define priorities and status and so on to each predefined task, adding comments where necessary.

If your marketing program or campaign has a combination of planning and start activities, you can create two activity plans, one for planning and one for execution tasks, and assign them both to the program or campaign.

Guidelines for Testing the Marketing Module in an Integrated Environment

To deploy the Marketing module for segmentation and list generation, you must install, configure, and test your integrated environment.

- Installation. You must install the following products:
 - Siebel Analytics Web Server and Siebel Analytics Server. For more information, see *Oracle Business Intelligence Platform Installation and Configuration Guide*.
 - Siebel Enterprise Server. For more information, see *Siebel Installation Guide* for the operating system you are using.
- Configuration. After installing, you must configure segmentation metadata, list export metadata, and create example list formats. For information about configuring segmentation and list export metadata, see the chapter about Marketing metadata in *Siebel Analytics Server Administration Guide*.
- Testing:
 - After installing the Marketing application and Marketing module, conduct a system test to verify that all components are correctly activated.
 - After you install and configure Siebel Marketing and create segmentation metadata, test campaign load.

This section contains guidelines that help you test a Marketing integrated environment.

To test the Symbolic URL integration

- 1 In Siebel Marketing, click the Segments screen tab.
- 2 In the Segments screen, click the Segment Designer link.
If the Segment Designer page does not appear, perform [Step 5 on page 29](#).
- 3 In the Segments screen, click the Segment Tree Designer link.
If the Segment Tree Designer page does not appear, perform [Step 5 on page 29](#).
- 4 Navigate to Administration - Marketing screen > List Formats.
If the List Format Designer page does not appear, perform [Step 5 on page 29](#).
- 5 If any of the previous steps do not obtain the specified results or you receive an error, return to Administration - Integration > WI Symbolic URL List and check the Host Administration settings.

To test the Web Services integration

- 1 In Siebel Marketing, click the Segments screen tab.
- 2 In the Segments screen, click the Segment Designer link.
- 3 In the Segment Designer, create a test segment and save the segment in the Web Catalog.
For more information about creating segments, see *Siebel Marketing User Guide*.
- 4 Navigate to the Campaign screen and perform the following steps:
 - a In the My Campaigns list, click New.
 - b In the record, enter a campaign name, and save the record.
 - c Click the Campaign name and click the Design view tab.

- 5 In the Design view, perform the following steps:
 - a Click the Segments/Lists link.
 - b In the Segments/Lists list, click Add Segment.
 - c In the Previously Used Segments dialog box, click Choose a new Segment.
 - d In the next Previously Used Segments dialog box, click the Folder Location select button to display the following folders in the Siebel Analytics Web Catalog:
 - ❑ Your user name
 - ❑ Shared
- 6 If you receive an error, perform the following steps:
 - a Navigate to Administration - Marketing screen > Servers view.
 - b Verify the following values:
 - ❑ The Marketing Server definition has the correct Authentication user and password
 - ❑ All three Web services have the correct Analytics Web Server name in the address

To test navigation links to the Segment Designer page

- 1 Navigate to the Campaigns screen.
- 2 In the My Campaigns list, click the name of your test campaign.
- 3 In the Campaign Details form, click the Design view tab.
- 4 In the Design view, click the Segments/Lists link.
- 5 Add a segment to associate it with a campaign.
- 6 Click the name of the segment.

The Segment Designer appears with your segment open for editing.

- 7 If you receive an error, verify the following:
 - a Navigate to Administration - Marketing screen > Servers and verify that the Marketing Server definition has three parameters for the navigation views.
 - b Log in to an Analytics URL directly, and verify that the segment request exists and can be opened successfully.

To test the campaign load

- 1 In Siebel Marketing, click the Segments screen tab and perform the following steps:
 - a In the Segments screen, click the Segment Designer link.
 - b In the Segment Designer, create a test segment and save the segment in the Web Catalog.
For more information about creating segments, see *Siebel Marketing User Guide*.
 - c Click the Advanced Options tab and verify that a valid Campaign Load List Format is associated with the segment.

- 2** Navigate to the Campaign screen and create a test campaign by performing the following steps:
 - a** In the My Campaigns list, click New.
 - b** In the record, enter a campaign name, and save the record.
 - c** Click the Campaign name and click the Design view tab.
- 3** In the Design tab, perform the following steps:
 - a** Click the Offers link.
 - b** In the Offers list, click New.
 - c** In the Add Offer dialog box, choose a test offer and click OK.
 - d** In the Treatments list at the bottom of the view, click New.
 - e** In the Pick Treatment list, choose a test treatment.
- 4** In the Design view, perform the following steps:
 - a** Click the Segments/Lists link.
 - b** In the Segments/Lists list, click Add Segment.
 - c** In the Previously Used Segments dialog box, click Choose a new Segment.
 - d** Locate and select your test segment.
- 5** Click OK twice to associate the segment with the campaign.

In the Allocation matrix, a check box appears for each treatment you associated in [Step 3](#).

 - a** Check the check box.
 - b** Click Save.
- 6** In the Campaign form, click Menu and choose Load Campaign.
- 7** In the Load Campaign dialog box, click OK to submit the load request.
- 8** Click the Execute view tab and select the System Tasks link.
- 9** In the System Tasks list, verify that the campaign loads successfully.

Monitoring Marketing System Tasks

The Marketing Application provides a set of views so users and administrators can monitor the progress of any marketing-specific server process. Each marketing-specific job is referred to as a system task. [Table 7 on page 32](#) contains a list of where to locate these jobs.

Table 7. Views for Monitoring Marketing System Tasks

Location	Purpose
Administration - Marketing > System Tasks	Displays marketing system tasks for all users.
Campaigns > Execute tab > System Tasks	Displays marketing system tasks for the selected campaign.
List Management > System Tasks	Displays list import system tasks.
Programs > Execute tab > System Tasks	Displays marketing system tasks for the selected program and related campaigns.

Each system task provides high-level logging details that track the successful completion or any errors in each major step of the task. Because the task log is intended to be used by all users, the System Task view does not provide low-level logging details.

If an administrative user wants further details on a marketing task, each step in the task log provides the Siebel Server, log file (indicating the server component), and Task Id. The administrator can use this information to locate the log file or the logging details under Server Administration.

Marketing system tasks display information for the following tasks:

- Analytics Data Load
- Campaign Launch
- Campaign Load
- Generate Source Codes
- List Export
- List Import
- Stage Execution
- Wave Launch

If you get the “Unable to connect to gateway server” error message when launching a Siebel Marketing task, then you have the Docked parameter in the CFG file set to TRUE. To correct the problem, quit Siebel Marketing, set the Docked parameter to FALSE, and restart.

Importing Marketing iHelp Files from the Demo Database

The demo database includes many iHelp files that can help users through frequently used tasks. The following section provides instructions for exporting any of the iHelp examples included.

NOTE: Oracle has developed a library of available tasks for Marketing tasks that are not part of the demo data/sample database. To obtain a copy of these iHelp files, please see Oracle's Siebel SupportWeb, or contact a representative from Oracle's Product Marketing or Oracle's Siebel Technical Support for assistance.

To export a task from the demo database

- 1 Connect an instance of an application to the demo database.
- 2 Navigate to Administration - iHelp screen > All iHelp Items.
- 3 Select a task to export.
- 4 In the iHelp Items list menu, choose Export iHelp Item Definition.
- 5 In the File Download dialog box, click Save and save the XML file anywhere on your computer's file system or anywhere on your network.

You can access the file later when you are ready to import it into another environment.

To import the task in your new installation

- 1 Navigate to Administration - iHelp screen > All iHelp Items.
- 2 In the iHelp Items list menu, choose Import iHelp Item Definition.
- 3 In the Import iHelp Item Definition dialog box, select the XML file from the location on your computer or network where you stored the task.
- 4 Click the Designer tab.
A flowchart of the steps appears.
- 5 Click the Responsibilities tab and associate the responsibilities that have access to this set of instructions.
- 6 In the All iHelp Items list, select the iHelp item record and click Activate.
- 7 Test the iHelp task by going to a screen related to the task and clicking the How do I icon in the top-left view bar.

3

Installing and Administering Segmentation and List Generation

This chapter describes how to install and administer segments and lists. It includes the following topics:

- [Installation Guidelines for the Marketing Module on page 35](#)
- [Update Default Repository and Connection Settings on page 36](#)
- [About Mapping Segmentation Metadata on page 36](#)
- [Setting Up Marketing Module Parameters in Siebel Analytics on page 37](#)

Installation Guidelines for the Marketing Module

To install the segmentation and list generation (Marketing module), you install Siebel Analytics version 7.7.1 or later. In this guide, the term Marketing module refers to the module within the Siebel Analytics Web Server that supports segmentation and list generation.

See the *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb for this release to confirm that your Siebel Marketing version and Marketing Server version (Analytics Web Server) is supported. For more information, contact Technical Support.

NOTE: The Siebel Analytics platform has been renamed to Oracle Business Intelligence Enterprise Edition (BI EE). For versions higher than Siebel Analytics version 7.8.x, information is posted using a new version numbering system, for example, as Oracle Business Intelligence Enterprise Edition v10.1.3.x or higher.

During the installation, make sure that you adhere to the following guidelines:

- Install Siebel Analytics, version 7.7.1 or later. This installation includes Analytics Server, Analytics Web Server, and the Marketing module. For installation instructions, see *Oracle Business Intelligence Platform Installation and Configuration Guide*.
- Use a set of Analytics license keys that allow access to the Marketing module capabilities. These license keys provide access to the following features in the Analytics Web Server:
 - Segment Designer
 - Segment Tree Designer
 - List Format Designer
- To reduce the size of the installation disk space, you can choose the Custom install option and clear the check boxes for any of the optional components in the following list that you do not need for your installation:
 - Analytics Server (Required)
 - Siebel Analytics Administration Tool (Required)

- Siebel Analytics Job Manager (Required)
- Siebel Analytics Application Repository (Required)
- Siebel Analytics Clustering Manager (Optional)
- Siebel Analytics Scheduler (Optional for Marketing)
- Siebel Analytics Client (Optional)
- Siebel Analytics ODBC Driver (Required)
- Siebel Analytics Web (Required)
- Siebel Analytics Catalog Manager (Required)
- Data Warehouse (Optional)

Update Default Repository and Connection Settings

After the install is complete, perform the following tasks:

- Update the nqsconfig.ini file:
 - Update the [Repository] section of the nqsconfig.ini to reference the Analytics Repository (RPD) file that contains the segmentation metadata. For more information about changing the nqsconfig.ini file see *Siebel Analytics Server Administration Guide*.
 - Start the Analytics Server and test that some queries run successfully.
- Verify the Analytics Web DSN:
 - Verify that the DSN Analytics Web points to the correct the Analytics Server on the machine where the Analytics Web Server is installed.
 - Start the World Wide Publishing Service, your Web server (for example, IIS), and the Analytics Web Server.
 - Log in and make sure you can navigate to the user interface for Segment Designer and List Format Designer:
 - If Siebel Answers and Siebel Intelligence Dashboards are licensed, run a test report query against the Analytics Server.
 - If Siebel Answers is not licensed, create a simple segment and try to Update Counts. Otherwise, use the Siebel Analytics Client to test a query.

About Mapping Segmentation Metadata

Segmentation identifies a group of targets for applying a marketing treatment. Typically, targets are individuals, businesses, bank accounts, or households but they can be any dimensional entity in the database such as Opportunities or Assets. Use the marketing segmentation user interface to specify criteria that groups targets based on behavior patterns. The Segmentation Metadata specifies this criteria and is composed of the following entities:

- Cache
- Conforming dimensions
- Qualified list items
- Sampling factors
- Saved Result Sets
- Segmentation catalogs
- Target levels

For instructions about how to create segmentation metadata, see *Siebel Analytics Server Administration Guide*. When you have created the segmentation metadata, you must test the integrated environment.

If you customize your data warehouse with a new column and you want Siebel Marketing to access the new column, make sure that the column is exposed in all three layers of the Analytics repository. For more information, see “Setting Up Marketing Segmentation Metadata”, in *Siebel Analytics Server Administration Guide*.

Setting Up Marketing Module Parameters in Siebel Analytics

This section contains the following topics:

- [Verifying Database Privileges for the Marketing Module on page 37](#)
- [Setting Permissions for Marketing Server Groups on page 38](#)
- [Administering Configuration Keys for the Marketing Module](#)
- [Managing Marketing Jobs on page 42](#)
- [Managing Marketing Defaults on page 44](#)

Verifying Database Privileges for the Marketing Module

The Segmentation and List Generation functions of the Marketing module use write-back capabilities for internal functions such as cache and saved result sets. For security reasons, the administrator can set up a second writable connection pool for the cache and saved result set database whose login and password has database privileges to create tables and write back to the database. Contact your database administrator to verify that the user has these privileges.

To verify that write back has been set up properly

- 1 In Target Levels, in Saved Result Sets, verify that the connection pool used for the physical SQL permits writeback.
- 2 In Qualified List Items, in Cache Information, verify that the connection pool used for the physical SQL permits writeback.

- 3 In User/Group Permissions, for Query Limits for the segmentation database, set Populate Privilege to Allow.

NOTE: You do not have to set Populate Privilege to Allow, if you select the Allow populate queries by default check box in the General tab.

Setting Permissions for Marketing Server Groups

Specify the Web Catalog folders for segments, segment trees, list formats, and filters to which each user or Web group can access.

To provide visibility to functions of the Marketing module, perform the following tasks:

- Specify the users and groups that are allowed to have access to the Segment Designer, Segment Tree Designer, and List Format Designer. For instructions about creating Users and Groups for the Analytics Web and managing access to Web Catalog folder, see *Oracle Business Intelligence Web Administration Guide*:
 - After the users and groups are created, navigate to the Administration - Marketing screen, select Marketing Server Admin, and then select Manage Privileges.
 - In Manage Privileges, designate which users and groups have permission to access and perform each privilege listed. For instructions about managing privileges for Analytics Web users, see *Oracle Business Intelligence Web Administration Guide*.
- Establish the Web users and groups that must have access to display each Analytics Web Catalog folder. For instructions about managing the Web Catalog and permissions, see *Oracle Business Intelligence Web Administration Guide*.
- In the Analytics Repository, verify which groups have permission to each Target Level, Segmentation Catalog, and Presentation Column.

To set permissions for Marketing Server Groups

- 1 Log in to Siebel Analytics as an administrator.
- 2 In the Analytics application, click the Admin link.
- 3 In the Siebel Analytics Administration page, click Manage Privileges.
- 4 In the Access row, allow access by the appropriate groups to the following parts of the Marketing module:
 - a Access Segment Designer
 - b Access Segment Tree Designer
 - c Access List Format Designer
- 5 In the List Formats row, specify which user groups can perform each action.
- 6 In the Segmentation row, specify which user groups can perform each action.

Administering Configuration Keys for the Marketing Module

Settings for the segmentation and list generation functions of the Analytics Web Server are contained in a configuration file named `instanceconfig.xml`. The configuration keys in this file control path names for the Marketing File System, logging levels, and other properties. [Table 8 on page 39](#) shows some of the configuration keys that apply to the Marketing module. For a complete explanation of configuration keys and how to edit the `instanceconfig.xml` file, see “Making Siebel Analytics Web Configuration Changes” in *Oracle Business Intelligence Web Administration Guide*.

Table 8. Marketing Parameter Default Settings

Configuration Key	Default Value	Description
AdministrativeLogin	Administrator	Login credential of the Administrative Analytics Server user under which Marketing runs its EXECUTE PHYSICAL queries. These include queries to delete cache result sets, delete saved result sets, delete header saved result sets and insert header result set records.
AdministrativePassword	SADMIN (Encrypted)	Password credential of the Administrative Analytics Server user under which Marketing runs its EXECUTE PHYSICAL queries. The password is encrypted and can be retrieved by posting the following URL as an Administrative Web user: <code>http://localhost/analytics/saw.dll?EncryptString&string=<password></code>
MarketingCacheMaxEntries	500	Maximum number of database cache entries.
MarketingCacheMaxExpires	1440	Maximum time that a database cache entry can exist before it is expired and removed.
MarketingDataValidation	False	Replaces control characters in the column data with spaces. If this parameter is set to true, control characters in the column data whose ASCII value is less than 32, such as the carriage return and the line feed characters, are replaced by spaces before writing out to any list files.
MarketingEnableNodeProfiling	True	Enables or disables the hyperlink to the profile dashboard from counts in the Segment Designer and Segment Tree Designer.

Table 8. Marketing Parameter Default Settings

Configuration Key	Default Value	Description
MarketingFileEncoding	UTF8	Character set encoding of the List Format files generated.
MarketingFileSystem	\\<hostname>\Lists\	<p>File system path used by Siebel Marketing to store output list files. This path must be accessible to the Analytics Web Server, must have write permissions for the user under which Analytics Web Server is started, and must end with a backslash.</p> <p>The Marketing transactional application must use the same location as the Marketing File System. In the following situations, Analytics Web Server must have access to the path specified in the MarketingFileSystem parameter:</p> <ul style="list-style-type: none"> ■ In an environment in which Siebel Server and Analytics Web Server are running on the same platform (homogenous), this path matches the Marketing File System server parameter. ■ In an environment in which Siebel Server and Analytics Web Server are not running on the same platform (heterogeneous), the Siebel File System must be made visible to Analytics Web Server by running a third-party application (such as Samba) where the Siebel File System resides and by exporting this path such as in the following example: /export/home/Siebel/filesystem (Analytics Web running on UNIX)
MarketingJobsLogDetailLevel	5	Amount of debugging information saved for each job.
MarketingJobsLogSize	100	Maximum number of jobs in the job history log. After the maximum is reached, the oldest jobs are expired and removed.

Table 8. Marketing Parameter Default Settings

Configuration Key	Default Value	Description
MarketingJobsWaitSeconds	20	Duration between successive checks on the status of a Marketing job run from the User Interface. The jobs include Segment Counts, Segment Tree Counts, Saved Result Set Creation (in the Segments user interface or the Segment Trees user interface) and Purge and List Format Preview/List Generation. The wait-refresh cycles keep the browser from timing out while waiting for the jobs to complete.
MarketingPreviewPath	\\<hostname>\Lists\Preview\	File system path where preview and output list files are written.
MarketingPreviewSize	200	Number of default records shown in the List Format Designer when a user selects Generate Preview. This parameter can be overridden by the end users in the Preview user interface by entering a different preview size in the Preview Parameters dialog box.
MarketingUseBOM	True	Controls writing of the Byte Order Mark (BOM) characters at the beginning of list files. Typically applications see BOM characters to identify the encoding of the data. <ul style="list-style-type: none"> ■ When set to true, BOM characters are inserted at the start of the list file, identifying the character encoding used in the file. ■ When set to false, the BOM characters are not written. ■ If you set the character set encoding to ANSI then no BOM is written.
MarketingWrapColumnHeaders	True	Applicable only when files are being written out in the Delimited format and when a Text Qualifier is specified. <ul style="list-style-type: none"> ■ When the default value is true, the column headers are wrapped using the text qualifiers specified in the List Format Options tab. ■ When the default value is false, column headers are not wrapped.

Managing Marketing Jobs

The Manage Marketing Jobs console displays the status and details of each segmentation or list generation request running on the Analytics Web Server. To display the details of a request, click the Details link in the Action column for the job.

You can also display the current database cache for any Qualified List Items accessed by a segment or segment tree request. To display the details for the cache, click Details in the Action column for the cache entry. To purge the cache, click the Purge link in the Action column for the cache entry.

NOTE: The Purge link next to each cache entry row purges existing cache entries for the user who created the entry.

To view marketing jobs

- 1 Navigate to Administration - Marketing screen > Marketing Server Admin.
- 2 In the Siebel Analytics Administration page, click Manage Marketing Jobs.
- 3 The top section displays marketing jobs. The bottom section displays cache entries. The following list describes the types of marketing jobs.

Marketing Job	Description
Get Counts	Represents a segment or segment tree count submitted through the Segment Designer, Segment Tree Designer, or SOAP API. For the Segment Designer, a count request within the Edit Criteria Block dialog box appears. The name of the segment or tree is always displayed in the information column.
Write List Files	Represents a list generation job for full output list generation or preview. The information field contains the list format name as well as the location where the output files are written.
Write Saved Result Set	Represents the saving of either a segment result set or a segment tree cell result set. The name of the segment or tree is always displayed in the information column.
Delete Saved Result Set	Represents the deleting of a segment result set. The name of the segment or tree is always displayed in the information column.
Purge Cache	Represents the user action of deleting cache result sets. This job type includes purging all caches, purging all caches for a specific user, purging cache for a specific segment, and purging cache for a specific tree.

Using Job Action Links

The following is a list of action links:

- **Cancel.** All marketing jobs can be cancelled by clicking the Cancel action link. If a job is in the middle of a long-running operation, such as running a set of Siebel Analytic Server queries, the job issues SQLCancels to cancel all queries. While the Analytics Server is processing the cancel, the job state shows Running (Cancelling). After all queries have been cancelled, the job state updates the value to Cancelled.
- **Cancel All.** Cancels all running jobs.
- **Detail.** Each job record also includes a Detail link which includes real-time information about the progress of the job. This log contains basic job statistics as well as detailed information specific to the job:
 - For count, write saved result set, and write list file jobs, the log includes the query plan used to generate the logical SQL and SQL results and timings.
 - For delete saved result sets, the log includes the logical delete statements on the header and data tables.
 - For write list files, the log includes the constrained list items qualified by the list and the list SQL.

Managing Cache in the Marketing Jobs Console

The Marketing Jobs console displays a list of the active Marketing cache for users of the Marketing module.

The cache entries can be seen under the Database Cache heading in the Marketing Jobs view. For each cache entry, the following information is provided:

- **Qualified List Item.** QLI for which the IDs were cached. This cache must be enabled for creating random split segments.
- **User.** User who submitted the Marketing job responsible for generating the cache.
- **Sampling Context.** Sampling factor used for the request, as indicated in the Segment Designer or Segment Tree Designer.
- **Created.** Date the cache entry was created.
- **Last Accessed.** Most recent time the cached was accessed by a job.
- **Expiration.** Date the cache entry expires.
- **Time to Create.** Time required to create the cache entry.
- **Action.** Used by the administrator to View Details for the entry or Purge all Cache entries for a user.
- **GUID.** Global Unique ID for the Cache entry. This ID is written to the Cache header table for each entry.

The administrator can use the console to manually purge cache entries, using one of the following approaches:

- The Purge All Cache link beneath the Database Cache heading purges all current caches.
NOTE: When scheduling a campaign stage execution and setting the frequency to Non-Recurring, there is no purge cache task created in the Manage Marketing jobs section. This is expected behavior as Purge Cache is only invoked for recurring requests.
- The Purge Cache link in the Action column for a cache entry purges all Cache entries for a user.
NOTE: This link purges all cache for that user, not just the entry for the link.

Managing Marketing Defaults

The Marketing Defaults page controls the default system parameters for segment and segment tree requests. Each parameter is set for each target level. You can set the following global defaults:

- **Default Campaign Load File Format.** This option sets the default campaign load format for any new segment or segment tree request. When a user creates a new segment or segment tree, you can view this parameter on the Advanced page in the Segment Designer or Segment Tree Designer.
- **Default Global Audience.** This option selects the segment to be used as the Global Audience for any new segments or segment trees created using that target level. Users can not remove Global Audiences from their segment or segment tree criteria. For more information about Global Audiences, see *Siebel Marketing User Guide*.
- **Default List Export File Format.** This option sets the default list format value that used by the Generate List button on the Segment Designer, and the Generate List menu option on a segment tree branch. This parameter allows the user to generate an output file of actual results from a segment while building segment criteria. The user can override the default value on the Segment Advanced tab if the user wants to use a different list format.
- **Default Saved Result Set File Format.** This option is used to populate the columns of information for each segment member when storing a saved result set.
- **Profile Dashboard.** This option controls the dashboard that appears when users click the Counts link in the Segment Designer or Segment Tree Designer.

Below the default fields, the view provides a setting (Enforce Global Audiences in the Segment Designer). When this check box is selected, the Global Audience for each Target Level appears at the bottom of any segments created in the Segment Designer.

Setting Global Marketing Defaults

This section describes how to set global defaults for campaign load formats, segments, or dashboards.

To set Global Marketing Defaults

- 1 Go to Analytics Web and click the Admin link.
- 2 In the Siebel Analytics Administration page, click Manage Marketing Defaults.
Target levels appear in the first column.

- 3** For each Target Level, perform the following steps:
 - a** In the Default Campaign Load File Format, click Browse and select the default format for new segments and segment trees.
 - b** In the Default Global Audience field, click Browse and select the default segment for new segment trees.
 - c** In the Profile Dashboard field, click Browse and select the default report that appears when the user clicks the hyperlinked counts in the Segment Designer or Segment Tree Designer.

4

Designing Marketing List Formats

This chapter describes how to design marketing list formats. It includes the following topics:

- [Acceptable Characters in Marketing Configuration Entries on page 47](#)
- [About Designing Marketing List Formats on page 47](#)
- [Designing Marketing List Formats on page 48](#)
- [List Format Column Properties and Formatting Options on page 66](#)

Acceptable Characters in Marketing Configuration Entries

When entering values in fields in the Marketing Administration screens, make sure to avoid using apostrophes ('). These result in multiple failures of the Marketing Server component during attribute synchronization, campaign generation, and other tasks. This failure is due to SQL relying on apostrophes as a delimiter. The presence of apostrophes in the data columns, such as attribute names, table names, field names, and hierarchy names causes an SQL error.

About Designing Marketing List Formats

List Formats define the layout of files that you can use for a variety of purposes. Use the List Format Designer to select content from a subject area (list catalog), using filters that you add to the list format definition.

The List Format Designer can generate list formats for several purposes. These formats are listed in the left selection pane:

- **List Export Formats.** Typically used for campaign distribution lists, such as direct mail, exports to external vendors, exports to other IT applications, and other channels. Typically, list formats contain the name, customer profile, address, email address, and other information for the members of a segment or segment tree cell.
- **Email Server Formats.** Used to export the relevant data for each member of an email campaign to the Siebel Email Marketing Server.
- **Campaign Load Formats.** Used to load the members of a segment or a segment tree cell into the campaign history table in the Siebel transactional database through EAI.
- **Data Load Formats.** Used to import any type of data into the Siebel transactional database through EAI.
- **Saved Result Set Formats.** Used to save result sets from segments and segment trees.

In the list formats page you can either open an existing, saved list format or create a new list format. To create a new list format, select a subject area in the list on the right. You specify the type of list later on using a control in the Options tab.

Existing list formats are in the List Format pane to the left. The formats are in folders, and the formats are organized first by format (List Export, Email Server, Campaign Load, and so on) and then by personal and shared formats. Examples: My List Export Formats, Shared List Export Formats.

You can combine data from more than one subject area by using the set operation capability in the List Format designer. You can combine data from more than one data source into a single file. For example, you can combine the list of segment members from your data mart with some additional customers that may only exist in your Siebel transactional database. To obtain descriptions for commonly used terms, see [“Frequently Used Terms for Marketing List Formats” on page 48](#).

The List Format Designer supports a variety of options to format the content including column sorting and casing for each column. For a list of formatting options, see [“Column Properties Formatting Options” on page 68](#).

Navigating to the List Format Designer

Access to the List Format Designer start page depends on your product license key and privileges. You open List Format Designer in one of the following ways:

- In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
- If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.

Frequently Used Terms for Marketing List Formats

[Table 9 on page 48](#) defines frequently used terms for list formats.

Table 9. Frequently Used Terms for Marketing List Formats

Term	Description
Column set	A set of columns from a subject area.
Data set	The result of applying filters to a column set selected from a list catalog.
Filter (list formats)	A criteria added to the list format to constrain the data included in the list file.
List catalog	A subject area that is enabled for list export.

Designing Marketing List Formats

The List Format Designer can generate lists in different formats for the following purposes.

- **List Export Formats.** For more information, see [Defining List Export Formats on page 49](#).

- **Email Server Formats.** For more information, see [Defining Email Server Formats on page 52](#).
- **Campaign Load Formats.** For more information, see [Defining Campaign Load Formats on page 54](#).
- **Data Load Formats.** For more information, see [Defining Data Load or Customer Synchronization Formats on page 56](#).
- **Saved Result Set Formats.** For more information, see [Defining Saved Result Set Formats on page 58](#).

The following topics are not specific to any one list format. They provide additional information to enhance your understanding of the capabilities of list formats:

- [Adding Columns to List Formats on page 59](#)
- [Combining Lists From Different Subject Areas on page 60](#)
- [Adding Calculated Fields and System Fields to a List Format on page 61](#)
- [Adding a System Data Expression as a Column in a List Format on page 61](#)

Defining List Export Formats

A List Export format defines the customer data and other campaign-related information that is exported so that the campaign can be executed. For example, a list export format may provide a list file for the following purposes:

- Sending a list of customers and addresses to a direct mail vendor for printing and mailing.
- Distributing a call list to employees in a sales organization.
- Exporting the campaign list to another IT application.

In addition to their use in campaigns, you can define list export formats for a wide variety of uses. The only requirement is that the data be accessible by the Analytics Server.

If you are using the standard metadata from the Siebel Analytics Administration Tool for the Siebel Data Warehouse, the application provides examples of List Export formats in the following location in the Web Catalog:

Shared List Export Formats/Marketing/Example List Formats

To create a list export format and add columns

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a New List Format.

- 2 From the list of Subject Areas on the right, select a subject area that includes the columns for your export file.
NOTE: Be sure to determine whether to get data from the Siebel transactional database, the Siebel Data Warehouse, or another data source, and then select the corresponding Subject Area.
- 3 Expand the folders in the left selection panel and click each column name to add it to the format.
- 4 To modify the displayed name for a column, in the Column Properties dialog box, use the Custom Headings option.
- 5 Click the properties button on a column to apply custom formatting.
For information about column formatting options, see [“List Format Column Properties and Formatting Options” on page 66](#).
- 6 Add any filters to be applied to the list format contents every time a list is generated.
NOTE: If the campaign membership already constrains the expected set of output records, this step is not required.
- 7 If you plan to use this export format for campaign execution, add filters to constrain the output to a specific campaign wave or set of waves using system data expressions.
- 8 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

To add filters to constrain output to the correct campaign waves

- 1 From the selection panel, add the column that corresponds to the Campaign Wave Id.
- 2 Select the formula button to add a filter based on the column.
- 3 In the Edit Filter dialog box, click Add and select System Data.
- 4 In the System Data list, select the Wave Id expression.
- 5 Click OK to add the filter.
- 6 Click the delete button to remove the column from the output columns (unless you want to include the Wave Id as an included column).
For information about adding system data expressions, see [“Adding a System Data Expression as a Column in a List Format” on page 61](#).
- 7 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

To set options, headers, and footers for list export formats

- 1 Click the Options tab and select the following options based on the results you want to achieve:

Attribute	Option
Purpose	List Export
(choose format)	Delimited File, Fixed Width, XML, or Database XML options: <ul style="list-style-type: none"> ■ Record Set element. Enter the XML tag name for the outer record set. ■ Record element. Enter the XML tag name for each record. Database options: <ul style="list-style-type: none"> ■ Table. Enter the table in which to store the records. ■ Connection Pool. Enter the connection pool name for access to the table.
End of Field Delimiter	(any)
Text Qualifier	optional
File Name	The default name includes components for format name, job ID, time stamp, and file counter. You can edit the default name by removing any of these components, and adding in constants (such as your company name). To add more components, click Available System Data.
Max # Records	Optional. You can limit the quantity of records in your output. This is useful for creating a test list and for when you have to limit the number of contacts in the list.
Include Column Headers	Optional
Order by all Non-measure columns left to right when no column is ordered explicitly	Check this to order (sort) the list as indicated in the prompt.

- 2 To set up a custom header or footer, click the Header and Footer tab.
- 3 To include text, click in the Header Content or Footer Content workspace.
- 4 If required, add any System Data expressions to the header or footer content.

For more information, see [“Adding Marketing List Format Headers and Footers” on page 69](#). For a list of system data expressions, see [“Adding a System Data Expression as a Column in a List Format” on page 61](#).

- 5 Test your list format by previewing some sample contents of the list format.

To preview a list format, see [“Previewing a Marketing List Format” on page 69](#).

- 6 To combine data from multiple subject areas, click Combine with list from another Subject Area. For more information, see [“Combining Lists From Different Subject Areas” on page 60](#).

NOTE: You must apply column formatting to the combined results.

- 7 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

Defining Email Server Formats

An Email Server format is used to export the members of an email campaign to the Siebel Email Marketing Server. The Email Personalization Format provides the columns that can be used as merge fields to personalize the email message sent to each recipient. You can find examples of email personalization formats in the following location:

Shared Email Server Formats/Marketing/Example List Formats

To define an email server format

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a New List Format.
- 2 From the list of Subject Areas on the right, select a subject area that includes the columns for your email server file.

In most situations, the Subject Area corresponds to data pulled directly from the campaign history in the Siebel transactional database.
- 3 Expand the folders in the left selection panel and click each column name to add it to the format.
- 4 Add the columns from the Subject Area to be available as merge fields in the email template.
- 5 Add the required columns.

The following columns are required for all email server formats:

- First Name
- Last Name
- Email Address
- Camp Con Id
- Contact Id
- Prospect Id

- Batch Number

NOTE: When you add the Batch Number column, you must include the column in the sort order and assign a split value. For more information, see [“Adding Columns to List Formats” on page 59](#).

- 6 Make sure that the displayed name of the column exactly matches the values in the list in [Step 3 on page 52](#).

- If a Subject Area column that you select from the required columns list does not have a column label that exactly matches the name in the list, in the Column Properties dialog box, use Custom Headings option to modify the heading.
- You can add additional columns as needed. If you must modify the displayed name for a column, in the Column Properties dialog box, use Custom Headings option.

- 7 Remove the table heading portion of the column header caption for all columns.

The Email Marketing Server expects each column header in the email file to contain the column header, not the table header caption. For each column in the format, use the following steps to remove the table heading portion of the column header caption:

- a Select Column Properties on the column.
- b In the Column Properties dialog, select the Custom Headings check box.
- c Delete the value in the Table Heading field.
- d Click OK.

- 8 To apply any custom formatting for a column, click the properties button on the column.

For information about column formatting options, see [“List Format Column Properties and Formatting Options” on page 66](#).

- 9 Add a filter to constrain the output based on the runtime Campaign Wave by adding the system data expression (Wave Id) to the column formula in the following steps:

- a Add the Wave Id column to the format.
- b Click the filter button and add the Wave ID System Data Expression in the filter.

For more information about adding system data expression to a list format, see [“Adding a System Data Expression as a Column in a List Format” on page 61](#).

- c Click the delete button to delete the Wave ID from the displayed columns.

- 10 If your email content needs to be filtered based on a secondary Qualified List Item, select the following check box in the Filter section of the Columns view:

Re-qualify list results against original segment criteria

- 11 If necessary, click the Options tab and specify the following options:

Attribute	Option
Purpose	Email Personalization
(choose format)	Delimited File

Attribute	Option
End of Field Delimiter	Comma
Text Qualifier	""
File Name	The default name includes components for format name, job ID, time stamp, and file counter. You can edit the default name by removing any of these components, and adding in constants (such as your company name). To add more components, click "Available System Data".
Max # Records	Optional. You can limit the quantity of records in your output. This is useful for creating a test list and for when you have to limit the number of contacts in the list.
Include Column Headers	optional
Order by all Non-measure columns left to right when no column is ordered explicitly	Check this to order (sort) the list as indicated in the prompt.

- 12 Test your list format by previewing some sample contents of the list format. To preview a list format, see ["Previewing a Marketing List Format" on page 69](#).
- 13 To combine data from multiple subject areas, click Combine with list from another Subject Area. For more information, see ["Combining Lists From Different Subject Areas" on page 60](#).
NOTE: You must apply column formatting to the combined results.
- 14 Click the save icon in the upper-right corner of the screen.

Defining Campaign Load Formats

A Campaign Load formats are used to load the members of a segment or a segment tree cell into the campaign history table in the Siebel transactional database through EAI.

To create a campaign load format and add columns

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a New List Format.
- 2 From the list of Subject Areas on the right, select a subject area that includes the columns for your campaign load file.

NOTE: Be sure to determine whether to get data from the Siebel transactional database, the Siebel Data Warehouse, or another data source, and then select the corresponding Subject Area.

- 3 Expand the folders in the left selection panel and click each column name to add it to the format.
- 4 To modify the displayed name for a column, in the Column Properties dialog box, use the Custom Headings option.
- 5 Click the properties button on a column to apply custom formatting.
For information about column formatting options, see [“List Format Column Properties and Formatting Options” on page 66](#).
- 6 Add any filters to be applied to the list format contents every time a list is generated.
NOTE: If the campaign membership already constrains the expected set of output records, this step is not required. If the customer records are already loaded into the campaign history and you are exporting these customers, it is not necessary to requalify the segment criteria.
- 7 If you plan to use this export format for campaign execution, add filters to constrain the output to a specific campaign wave or set of waves using system data expressions.
- 8 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

To set options, headers, and footers for formats

- 1 Click the Options tab and select the following options based on the results you want to achieve:

Attribute	Option
Purpose	Campaign Load
(choose format)	Delimited File, Fixed Width, XML, or Database
End of Field Delimiter	(any)
Text Qualifier	optional
File Name	The default name includes components for format name, job ID, time stamp, and file counter. You can edit the default name by removing any of these components, and adding in constants (such as your company name). To add more components, click “Available System Data”.
Max # Records	Optional. You can limit the quantity of records in your output. This is useful for creating a test list and for when you have to limit the number of contacts in the list.
Include Column Headers	optional
Order by all Non-measure columns left to right when no column is ordered explicitly	Check this to order (sort) the list as indicated in the prompt.

- 2 To set up a custom header or footer, click the Header and Footer tab.
- 3 To include text, click in the Header Content or Footer Content workspace.

- 4 If required, add any System Data expressions to the header or footer content.
For more information, see [“Adding Marketing List Format Headers and Footers” on page 69](#). For a list of system data expressions, see [“Adding a System Data Expression as a Column in a List Format” on page 61](#).
- 5 Test your format by previewing some sample contents of the format.
To preview a format, see [“Previewing a Marketing List Format” on page 69](#).
- 6 To combine data from multiple subject areas, click Combine with list from another Subject Area.
For more information, see [“Combining Lists From Different Subject Areas” on page 60](#).
NOTE: You must apply column formatting to the combined results.
- 7 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

Defining Data Load or Customer Synchronization Formats

The Data Load format is used to import any type of data into the Siebel transactional database. The customer synchronization format is used to import a batch of new customers into the Siebel transactional database or to update a set of customer profiles. You can find examples of data load formats in the following location:

Shared Data Load Formats/Marketing/Example List Formats

Column Headings Must Match Field Names in Integration Components

If you use one of the standard subject areas provided for data load, the column names are already set to match the field names in the Integration Components in the Siebel enterprise application. To load data that does not exist in these subject areas, you must use other subject areas.

CAUTION: Data Load and Customer Synchronization formats must have columns that exactly match the field names of the integration components where the data is loaded.

If necessary, use Custom Headings in the Column Properties dialog box to rename any columns whose label does not exactly match the name of the integration component field name in the Siebel enterprise application.

For customer data (Contacts, Accounts, and Prospects), the standard application provides example subject areas that are already set up for Analytics Data Load. The standard application provides the following three subject areas that can be used for this purpose:

- Campaign Load - Contacts
- Campaign Load - Accounts
- Campaign Load - Prospects

Preconfigured Integration Objects Used in Headers and Footers

The standard application provides the following preconfigured integration objects that you can use in headers and footers:

- Analytics Account
- Analytics Contact
- Analytics Household

In the standard repository (SRF file), only certain fields from the extension tables in the business objects for Contacts, Accounts, and Households are enabled for update by default using the Analytics Data Load process. For example, in the Contacts business component, only the extension columns Attribute 49 through Attribute 64 are set up for this purpose. If you must update additional extension columns, confirm that the business component fields are enabled for update through the corresponding Integration Component.

For more information about the available fields in the Analytics Data Load integration components, see [“Field Names for Marketing Integration Components” on page 186](#).

To define data load or customer synchronization formats

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, you click the Marketing screen tab and then click Create a List Format.
- 2 From the list of Subject Areas on the right, select a subject area that includes columns to load into the Siebel enterprise application.
- 3 Expand the folders in the selection panel and click each column name to add it to the format.
- 4 Verify that you have included the required columns for the Siebel Business Component to load. For more information about business components, see *Configuring Siebel Business Applications*.
- 5 If necessary, in the Column Properties dialog box, use Custom Headings option to rename any columns whose label does not exactly match the name of the integration component field name in the Siebel enterprise application. For more information, see [“Column Headings Must Match Field Names in Integration Components” on page 56](#).

CAUTION: Data Load and Customer Synchronization formats must have columns that exactly match the field names of the integration components where the data is loaded.

- 6 Apply filters to constrain the data to be loaded.

For example, to load contacts that have been added to the Data Warehouse since 01/01/2004, you could add a filter similar to the following:

Contact Created Date is greater than 01/01/2004 12:00:00 AM

- 7 Click the Options tab and select the following options:

Attribute	Option
Purpose	Analytics Data Load or Customer Synchronization
(choose format)	Delimited File

Attribute	Option
End of Field Delimiter	Comma
Text Qualifier	""
Max # Records	1000

- 8 Click the Headers and Footers tab.
- 9 In the Headers and Footers field, enter the integration object name to load using the following format. See the following example:

Format	Example
# <i>integration object name</i>	# Analytics Contact
#	#

CAUTION: You must not add additional text or a system data expression to the header. Additionally, do not press enter at the end of the second line. For EAI formatting, there must not be an end-of-line character at the end of the header.

For more information, see [“Preconfigured Integration Objects Used in Headers and Footers” on page 56](#).

- 10 Test your list format by previewing some sample contents of the list format. To preview a list format, see [“Previewing a Marketing List Format” on page 69](#).
- 11 To combine data from multiple subject areas, see [“Combining Lists From Different Subject Areas” on page 60](#).
- 12 Click the save icon in the upper-right corner of the screen.

Defining Saved Result Set Formats

Saved Result Set formats are used to save result sets from segments and segment trees.

To create a saved result set format and add columns

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a New List Format.
- 2 From the list of Subject Areas on the right, select a subject area that includes the columns for your export file.

NOTE: Be sure to determine whether to get data from the Siebel transactional database, the Siebel Data Warehouse, or another data source, and then select the corresponding Subject Area.

- 3 Expand the folders in the left selection panel and click each column name to add it to the format.
- 4 Click the properties button on a column to apply custom formatting.
- 5 Add any filters to be applied to the list format contents every time a list is generated.
- 6 Click the save icon in the upper-right corner of the screen and follow the instructions in the dialog box.

Adding Columns to List Formats

You select the columns in a subject area to include in a list format. The subject area for the request is listed in the selection pane with the tables and columns it contains.

After you have added a column, you can use the buttons on the column to modify the column formatting, add a formula, add a filter, or sort or split the contents.

CAUTION: If you click the refresh button in the browser window before you finish creating a request, be aware that the browser reloads all frames and deletes your changes.

To add a column to the list format

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, you click the Marketing screen tab and then click Create a List Format.
- 2 Create a new list format or open an existing format.
- 3 Click columns in the selection pane to add them to the list format definition.
- 4 Use the column buttons shown in [Table 10 on page 59](#) to control the use of each column in the request.

Table 10. List Format Button Descriptions

Button	Description
	<p>The order by button adds a column to the sort order and specifies the order in which results are returned, ascending or descending. The button appears as gray (unavailable), up and down arrows if the column has not been added to the sort order. When a column is part of the sort order, the button changes to an up or a down arrow.</p> <p>You can order results by more than one column. If you choose more than one column, the order sequence number appears on the order by button. To remove or change the sort order from a column, click the order by button until the sorting is changed or removed.</p>
	<p>Click the properties button to edit various format properties for the column. For more information, see “List Format Column Properties and Formatting Options” on page 66.</p>

Table 10. List Format Button Descriptions

Button	Description
	The edit formula button lets you change the column heading, create a formula for the column (such as adding a Rank or Percentile function), or add a system data expression. For more information, see “Adding Calculated Fields and System Fields to a List Format” on page 61 .
	The add filter button lets you create or edit a filter for the column. For information about adding filters to a criteria block, see <i>Oracle Business Intelligence User Guide</i> .
	The split button splits the contents of the file by unique values in that column. The split button is not available unless the column is part of the sort order. When the split is active, a separate file generates for each distinct value for that column in the results.
	The delete button deletes the column from the request.
	The action button opens a menu of available options.

To sort a list or split a list into multiple files

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 Locate the column or columns by which to sort or split.
- 3 Use the column buttons described in [Table 10 on page 59](#) to activate sorting or splitting.

Combining Lists From Different Subject Areas

You can use a List Format to combine two or more lists from different Subject Areas. For example, you can combine a set of customers from your data warehouse with a set of customers from your Siebel transactional database.

To combine data sets from multiple subject areas, you select a similar column set from each subject area. After you have combined two or more column sets, you can use standard set operators (Intersect, Union, Union All, and Minus) to determine the final result set.

Each column set from each subject area must have the same number of columns and the data types for corresponding columns must match.

To combine data sets across subject areas

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.

- If you log in to the Marketing module directly, you click the Marketing screen tab and then click Create a List Format.
- 2 Select a column set from your first subject area.
- 3 Add filters to control the contents of the first data set.
- 4 Click Combine with list from another Subject Area.
- 5 Select the Subject Area for your second column set.
- 6 After you have added the columns for each column set, click the Combined Results link.
- 7 Click the buttons on the columns in the Combined Results to control the formatting, sorting, and splitting of the combined list.

Adding Calculated Fields and System Fields to a List Format

Use the column formula dialog box to add a calculated column or a column based on a system data expression to the list format. Calculated fields can be created using a wide variety of formulas based on other columns in subject area.

System Data are variables that can be added to a list format at run time. For example, if you are exporting a campaign file, you may want to include a column displaying the segment for each customer in the list. To do this, you add System Data for the Segment Name to the list format, and the server determines the correct segment for the file based on the campaign being executed. System Data can also be used for filtering the contents of the file based on the context of a campaign or other use.

Adding a System Data Expression as a Column in a List Format

To automatically populate campaign contact columns with values that are determined by the list generation process at run time, you must set up the Campaign Contact columns to use system data expressions.

If you use list export format for campaign execution, you can add columns to constrain the output using system data expressions. To add a filter to constrain the output based on the run-time campaign wave, add the system data expression wave ID.

To add a system data expression

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 In the List Format Designer, select a column from the selection pane.
- 3 Click the fx button.
- 4 In the Edit column Formula dialog box, select the Custom Headings check box.
- 5 Delete the text from the Column Formula workspace.

- 6 Click the Available System Data link.
- 7 In the System Data list, select a system data expression.

For example, if you choose the Campaign Id expression, the following appears

```
@{campaignID}{0}
```

NOTE: The value in the braces at the end of the expression is the default value for the expression. If you do not provide an input value for the list generation request, the default value is used.

- 8 To display the System Data Expression column in the file, leave the column in the column set at the top of the page.
- 9 To filter the content but not display the column, perform the appropriate steps from the following list:
 - Add the column.
 - Apply the data expression to the Column Formula.
 - Delete the column from the column set by clicking the delete button on the column.

Configuring the System for New System Data Expressions

You may need to add System Data Expressions in addition to data expressions that are automatically installed. For example, you might have customizations that require that additional information be passed to the list generation job by the Web Service. Or, if you are upgrading from a previous version of Siebel Marketing, new columns such as Treatment Id might not be included in your repository and configuration files. You must modify two configuration files to add system data expressions.

To add new System Data Expressions

- 1 Open the marketingwebexpressions.xml file.
(root directory)\Siebel AnalyticsData\config\marketingwebexpressions.xml

- 2 Scroll to the bottom of the file and add your new expression.

For example, if you want to add treatmentID, enter a new section:

```
<WebExpression name="treatmentID" usequotes="true">
    <messageKey>kmsgMktgWebExprTreatmentId</messageKey>
    <default></default>
</WebExpression>
```

- 3 Test to make sure that the new expression appears in the User Interface.
 - a Save your changes to the marketingwebexpressions.xml file.
 - b Restart the Analytics Web Server.
 - c Navigate to Administration - Marketing > List Formats.

- d Create a list format or open an existing format.
- e Click on the button for a column, enter the cursor in the formula box, and then select the System Data link.

The new expression appears in the list.

- f Click the new expression, and a formula is automatically populated.

The treatmentID expression, similar to the following example, appears:

```
'@{treatmentID}{}'
```

Using Extension Attributes as System Data Expressions

You can use extension attributes as system data expressions by adding them to the `marketingwebexpressions.xml` file. The following is an example:

```
<WebExpression name="segment.offer" usequotes="true">
  <messageKey>kmsgMktgWebExprOfferName</messageKey>
  <default t></default t>
  <context>extensionAttribute</context>
  <width>10</width>
</WebExpression>
```

When you are done editing the `x` file, click **Reload Metadata** in the Marketing window. You do not need to stop and restart a server or log out and back in to the application.

System Data Expressions Used in List Format Elements

Each list format element (Column formula, Headers/Footers, and Filters) can contain one or more system data expressions. [Table 11 on page 63](#) shows which System Data Expressions can be used in each list format element.

Table 11. System Data Expressions Used in List Format Elements

System Data Expression	Column Formulas (Y=Supported)	Filters (Y=Supported)	Headers/Footers (Y=Supported)
Bytes per Record			Y
Campaign Id	Y	Y	Y
Campaign Name			Y
Campaign Source Code	Y	Y	Y
Current Date and Time			Y
Current User			Y
DNIS Number	Y	Y	Y
Email Batch Number	Y	Y	
File Counter			Y

Table 11. System Data Expressions Used in List Format Elements

System Data Expression	Column Formulas (Y=Supported)	Filters (Y=Supported)	Headers/Footers (Y=Supported)
File Size in Bytes			Y
Load Number	Y	Y	Y
Offer Code	Y	Y	Y
Offer Name	Y	Y	Y
Qualifying Segment	Y	Y	
Record Count			Y
Segment Id	Y	Y	
Segment Path	Y	Y	
Segment Tree Node Path	Y	Y	
Segment Tree Path	Y	Y	
Split Details			Y
Token Number	Y	Y	
Treatment ID	Y	Y	Y
Wave Id	Y	Y	Y

List Format Types and Valid System Data Expressions

All system data expressions cannot be used with every list format. [Table 12 on page 64](#) contains the list formats and shows which system data expressions can be used with each one.

Table 12. List Format Types and Valid System Data Expressions

List Format Type	Valid System Data Expressions
Analytics Data Load	No System Data Expressions
Campaign Load	Campaign Id Email Batch Number Load Number Segment Id Token Number Treatment ID
Customer Sync	No System Data Expressions

Table 12. List Format Types and Valid System Data Expressions

List Format Type	Valid System Data Expressions
Email Personalization	Bytes Per Record Campaign Id Campaign Name Campaign Source Code Current Data and Time Current User DNIS Number File Counter File Size in Bytes Offer Code Offer Name Record Count Segment Id Split Details Wave Id

Table 12. List Format Types and Valid System Data Expressions

List Format Type	Valid System Data Expressions
List Export	Bytes Per Record Campaign Id Campaign Name Campaign Source Code Current Data and Time Current User DNIS Number File Counter File Size in Bytes Offer Code Offer Name Record Count Segment Id Split Details Treatment ID Wave Id

List Format Column Properties and Formatting Options

You can edit properties for a list column to control the appearance and layout of a column and its contents. [Table 13 on page 68](#) contains format options and descriptions.

This section contains the following topics:

- [Editing the Layout of Column Contents on page 66](#)
- [Previewing a Marketing List Format on page 69](#)
- [Adding Marketing List Format Headers and Footers on page 69](#)
- [Options for Marketing List Formats on page 70](#)

Editing the Layout of Column Contents

Use the Column Format tab of the Column Properties dialog box to perform the following tasks:

- **Specify whether or not the column must appear in results.** Columns are usually visible in results by default. However, you may want to include a column in your request that is not displayed in the results, such as a column used in creating a filter.
- **Assign alternate table and column headings and apply custom formatting to them.** You can also use functions and conditional expressions to format results in a variety of ways. Your selections apply only to the contents of the column for the request with which you are working.

To hide a column in report results

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 In the List Format designer, click the properties button for a column.
[Table 13 on page 68](#) contains format options and descriptions.
- 3 In the Column Properties dialog box, in the upper-right corner, select the Hide Column check box.
- 4 Click OK.

To create or change custom table and column headings

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 In the List Format designer, click the properties button for a column.
[Table 13 on page 68](#) contains format options and descriptions.
- 3 In the Column Properties dialog box, in the Headings area, click the Custom Headings check box and perform the following steps:
 - a To add a custom table heading and column heading name, enter new names in the Table Heading and Column Heading fields.
The custom heading is used in this request instead of the default heading.
 - b To prevent a table name to appearing in the heading, use a blank name for the Table Heading field.
 - c To change the format of the table heading or column heading, In the Column Format area, click the edit format button next to the Table Heading or Column Heading field.
- 4 In the Column Format area, complete the appropriate fields using [Table 13 on page 68](#) as a guide.
- 5 To control the way the data displays, in the Data Format area, select the Override Default Data Format check box and complete the appropriate fields.

6 Click OK.

Table 13. Column Properties Formatting Options

Format Option	Description
Alignment (for fixed width only)	Justifies the value in the column relative the right and left boundaries of the column. The options are Left Justify, Center Justify, and Right Justify.
Casing	<p>Casing controls how capitalization is used in the selected column. The following are casing options with examples in parentheses:</p> <ul style="list-style-type: none"> ■ Upper case (UPPER CASE) ■ Lower case (lower case) ■ Title case (Title Case) ■ Sentence case (Sentence case) ■ No casing (data is not modified from its original form)
Default Value	If you enter a default value in the Properties dialog box, if the selected column has an empty value for a row, the default value is inserted.
Headings	<p>Headings display as the first row in the file when you select Include Column Headers in the List Format options page. By default, the heading is Presentation_Table_Name.Presentation_Column_Name.</p> <p>For a column, you can provide a custom name for the table and column portions of the column header.</p>
Hide Column	If you check this option, the column does not appear in the contents of the file. However, a hidden column can be used for sorting, splitting and shuffling.
Override Default Data Format	<p>Overrides the default display characteristics. In the column Properties dialog box, the selections that appear vary based on the data type. For example, if the column contains numeric data, you can choose formatting options, such as percentages, month names, or dates. You can choose the number of decimal places to display, how to display negative numbers, the number of digits to show, and the thousands separator to use.</p> <p>To use a custom format for text, choose Custom Text Format from the drop-down list, and then enter the custom format.</p> <p>To create a custom numeric format, you can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail as shown in the following examples:</p> <p style="padding-left: 40px;">Specifying ##.# shows 12.34 as 12.3</p> <p style="padding-left: 40px;">Specifying ##.000 shows 12.34 as 12.340</p>

Table 13. Column Properties Formatting Options

Format Option	Description
Shuffle Forward	The shuffle forward option makes a column eligible to be moved to the left whenever the column to the left of the shuffled column is empty. For example if Column 1 has an empty value for a row and Column 2 is enabled for Shuffling, the value in Column 2 is written to Column 1. If multiple columns adjacent to the shuffled column (to the left) are empty, the shuffled value slides as far to the left as possible.
Width (for fixed width only)	Width specifies the maximum number of characters that can be entered in the column.

Previewing a Marketing List Format

You can preview the layout of a list format using the Preview tab. To preview the file you provide some test parameters for any system data expression or Segments that are used to constrain the contents of the list.

To preview a list format

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 In the List Format Designer, select a format to preview.
- 3 Click the Preview tab.
- 4 Verify that the Destination Folder Path points to a desired location.
- 5 In the List Parameters area, click Add.
- 6 Enter a test value for a Segment or System Data expression you have used in the format. If you have used multiple System Data, you can click Add more than once.
- 7 To generate a preview list of a few records, click Generate Preview.
- 8 Enter the number of records to preview.
- 9 To generate a complete file of qualifying records, click Generate List File.

Adding Marketing List Format Headers and Footers

Use the Headers and Footers page to add text content to the beginning or end of list files that are generated. The content of the header or footer can consist of text plus System Data expressions.

To add a header or footer to a list format

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 In the List Format Designer, select a format.
- 3 Click the Header and Footer tab.
- 4 Add any text in the Header Content or Footer Content workspace to be included at the beginning or end of the file.
- 5 To add a System Data expression, place your cursor in the Header Content or Footer Content workspace, click Available System Data link and select the desired expression.

Options for Marketing List Formats

The Options view tab controls the file type and file formatting for any lists generated using the list format.

- **Purpose.** The intended use of the List Format. The type you choose determines in which folder the list format is saved and where in the Siebel Marketing application the list format is visible. For more information, see [“About Designing Marketing List Formats” on page 47](#).
- **Delimited/Fixed Width.** Indicates whether the columns in the file contents are delimited using a character or use fixed width.
- **End of Field Delimiter.** Indicates the character used to delimit the columns in the file.
To use a special character other than commas, semicolons, spaces, or tabs, select Other and enter another character in the field to the right of the selection.
- **Text Qualifier.** This option wraps the values in each column with a pair of characters. You have the option to use double quotes (") or single quotes (').
- **File Name.** The default name includes components for format name, job ID, time stamp, and file counter. You can edit the default name by removing any of these components, and adding in constants (such as your company name). To add more components, click Available System Data.
- **Max # Records.** This option limits the number of rows that can be written to a single file. When the maximum number of records is reached, List Designer starts a new file. The List Designer generate additional files until all records are exported.
- **Include Column Headers.** When you select this check box, the column labels are included as the first row in the file.
- **Order by all Non-measure columns left to right when no column is ordered explicitly.** Check this to order (sort) the list as indicated in the prompt.

5

Creating Source Code and Vendor Profiles

This chapter describes how to create source codes and vendor profiles. It includes the following topics:

- [About Source Codes](#)
- [Creating Source Code Formats on page 72](#)
- [Setting Up Vendor Profiles on page 75](#)

About Source Codes

Siebel Marketing uses source code capabilities with exported lists, for proper campaign tracking and reporting. The source code format can include encoded information about each customer or prospect based on any business component field. You can also define and maintain multiple formats for use in different campaign scenarios. After you launch the campaign, the source codes assigned to each customer can be captured as part of the response and decoded for closed-loop tracking.

Siebel Marketing supports the assignment of source codes to each contact in a campaign. A source code appears to the customer as a seemingly indecipherable mix of alphanumeric characters that typically can be found on a mailer. Marketers, however, can gather a wealth of information about the demographic makeup of the consumer responding to an offer, as well as the particulars of the marketing campaign that delivered the promotion, by decoding the source code.

In a typical scenario, a customer contacts a company's call center to place an order for merchandise or ask questions about an item advertised in a catalog. During the first few minutes of the call, the representative asks the customer to read the code that appears on the catalog's label or order form. Depending on the information received, the call center representative may be authorized to present to the customer a better offer on the merchandise than the one in the catalog.

The call center representative can also capture the customer's source code to make sure that the marketing organization can make the link that this customer is responding to a direct marketing campaign.

In Siebel Marketing, a unique source code is assigned to a marketing program element each time an element is created. Marketing program elements include program, stages, segments, campaigns, and waves.

NOTE: When marketing programs, segments, and campaigns are created, Siebel Marketing assigns a unique source code value to new program stages, segments, and campaigns. Although the stage or campaign's name may be duplicated, the source code field is the actual identifier. If you change the assigned source code to something more meaningful to you, make sure it is a unique value.

These individual source code components are concatenated and grouped according to the sequence and format that you specify in the Source Code Formats view to help you track your marketing program and analyze response to campaigns and offers. The source code format can contain up to 75 characters and may optionally include other tracking information.

When you load a campaign or generate source codes manually, the source code for each contact is assembled, based on the characteristics associated with the target contact in the marketing program. For example, the source code for a contact who is in Segment 1 and is in the first wave of Campaign 1 can be different from the source code for a contact who is in Segment 3 and the second wave of Campaign 1.

In addition, you can tailor the contact information that is generated for the distribution list to suit your business requirements. At minimum, a list has a contact's name or some other identifier and a source code. It may also contain an address (if you are mailing to the contact), phone number (if you are calling the contact), email address, account number, and so on.

Creating Source Code Formats

The Source Code Formats view defines a source code format, specifies the individual components that are included, and determines how these components are arranged or sequenced.

After creating a source code format, you can use the source code in the following ways:

- Include in an export list.
- Embed as a personalization element in an email offer.
- As input in the customer-facing Web Marketing home page (in the applet named Do you have another offer?).
- As a direct input to a response from any of the Response views.

The Source Code Formats list shows available source code formats. The All Components list displays details of the source code format selected in the list and is used to create the structure of the source code grouping, or format. The All Components list contains the computed length of each source code (maximum of 75 characters).

By clicking Move Up or Move Down, you can rearrange components in the format. If you delete components (for example, component 2 and component 4 of 5), click the menu button and choose Resequence to reorder the remaining components before saving the record.

To create source code formats

- 1 Navigate to Administration - Marketing screen > Source Code Formats.
- 2 In the Source Code Formats list, create a new record.
- 3 Enter a name and a description for the Source Code Format.
- 4 When you save the source code format, the new format appears in the Source Code Formats list.

To define source code format components

- 1 Navigate to Administration - Marketing screen > Source Code Formats.
- 2 In the Source Code Formats list, select a source code format.
- 3 In the All Components list, create a new record.

- 4 Complete the fields for the component, using the following information as a guide.

Field	Description
Attribute	Shows the available fields from the business component. For a list of available business components, see the Type row in this table. The Attribute MLOV (Multiple List of Values) column in the Source Code formats view records the language-independent code for each Attribute. The language independent code must exactly match the field name in Siebel Tools. Do not attempt to add extension fields that exceed 30 characters. The <i>displayed</i> value is limited to 75 characters.
Constant Value	Specifies an optional constant value to be inserted in the source code. This is editable only when the Type field is set to Constant.
Default Value	Inserted when the input value is NULL. You can provide a default value for any source code component. For example, if you included Campaign Member Country, you could insert a value for any members with no Country in their profile.
Sequence	Sequence determines the position of the code component in the source code format. Sequence is automatically set when source code components are added to the format. Use Move Up, Move Down or Resequence to adjust the order.

Field	Description
Type	<p>The Type field shows the business component used as the source of the field. The supported components are Campaign, Campaign Member, Offer, Program, Segment, Stage, and Wave. When you select one of these types, you must also select the Attribute.</p> <p>The Type field also supports inserting a Constant, Numeric Sequence, or Alphanumeric Sequence. You can not use both a Numeric Sequence and an Alphanumeric Sequence in the same source code.</p> <ul style="list-style-type: none"> ■ Constant. A fixed value that is the same for all campaign members. You can have more than one constant in the source code format. For example, you can use a constant to insert a spacing character such as a hyphen (-). ■ Numeric Sequence. Inserts a running count in the source code for each campaign member in a campaign wave. The value uses a standard integer sequence of 1,2,3...9,10,11...N. ■ Alphanumeric Sequence. Similar to Numeric Sequence, except that the values include integers and letters of the alphabet. For example, 1,2,3...9,A,B,C...,X,Y,Z,10,11, and so on. <p>The source code generator adds a prefix of zeros (0) to the numeric sequence and alphanumeric sequence based on the width of the field. For example, if the width is 4, the values are 0001, 0002, 0003, and so on.</p>
Width	<p>The width of the source code component is automatically added. However, you can change the width. The maximum width for the entire source code format is 75 characters. The following is a list of examples:</p> <ul style="list-style-type: none"> ■ If the source code width for a component is 16 characters and you specify 6 as the width in this field, the individual source code for the component is truncated to the first six characters. ■ If the component's code has a width of 10 characters, and you specify 20 as the width, 10 blank spaces appear in your source code format.

5 Save the component.

NOTE: Repeat Step 3 on page 72 through Step 5 on page 74 to add more components, one row at a time.

6 Adjust the sequence of the components by clicking Move Up and Move Down.

To reorder deleted components before saving the changes, click the menu button and choose Resequence.

Setting Up Vendor Profiles

Vendors are external partners that receive lists of target contacts when you launch a campaign. Your campaign strategy may call for vendors such as call centers, fulfillment centers, and printers to split lists of contacts. Some customers would receive a telephone call, others a direct mail offer, and a third group would receive promotion samples.

Use the Vendors view to create a library of vendor profiles for your marketing programs. Vendors include telemarketers, fulfillment houses, and any other company you retain to help you with campaign distribution.

Vendor Tasks

When you launch a marketing campaign, the generated output list is sent to the specified vendor using the vendor's preferred distribution method and communications protocol (File Transfer Protocol, email, and so on).

Before creating a vendor record, make sure the following tasks have been performed:

- **Create Export List Formats.** Ask your vendor what format they prefer for the generated distribution lists. For example, do they want the list to contain a header or do they prefer ASCII (default) or fixed-width output. Then, create an output file layout tailored to the vendor's preferences.

You are asked to provide the default export list format when creating the vendor profile. For more information, see ["Designing Marketing List Formats" on page 48](#).

- **Determine Distribution Method and Create Distribution Profile.** As you are creating the vendor record, you must select a distribution method and a distribution (communications) profile for the method. Set up distribution profiles that reflect each vendor's requirements.

For example, if your vendor prefers to receive list files using File Transfer Protocol (FTP), you would set up a communications profile for that vendor containing information about HostName, IP Address, Password, and so on. Communications profiles are set up using the Communications Administration screen's Communications Drivers and Profiles view.

If the list files are sent to the vendor attached to email, set up a communications profile for email, and verify that the vendor contact has provided an email address. For more details, see ["Defining Distribution Profiles for Vendors" on page 76](#).

If someone in your marketing department receives the distribution list, rather than an outside vendor, a vendor record and communications profile that includes the team member's email address must be set up.

Defining Vendors

Use the following procedure to set up profiles for the third-party vendors that receive the distribution list of contacts. If your marketing department is the list recipient, set up a vendor profile using the marketing department contact as the vendor.

To define vendors and assign list distribution methods

- 1 Navigate to Administration - Marketing screen > Vendors.
- 2 In the Vendors list, create a new record.
- 3 Complete the fields for the vendor definition, using the following table as a guide, and save the record.

NOTE: If one vendor can handle multiple list formats, such as a direct mail format and a telWeb Marketing format, create separate vendor profiles for each type. For example, the profiles may be named: Ace Fulfillment: Direct Mail, and Ace Fulfillment: TelWeb Marketing.

Field	Comment
Contact Name	Select the contact name, if it exists. If the contact does not appear in the list, add the relevant information using the All Contacts list. By default, the server looks for the email address in the EMAIL_ADDR column of the S_CONTACT table. If you store the email address in a different column, see <i>Siebel Communications Server Administration Guide</i> to configure the Recipient Email Address field.
Distribution Method	Choose the method that describes how the distribution list is sent to the vendor.
Distribution Profile	Choose from the list of predefined distribution profiles. Distribution Profiles are defined using the Administration - Communications > Communications Drivers and Profiles view.
Email Address	The email address for the vendor is populated if it was defined for the selected vendor contact. You cannot add the email address in this view. If you plan to send a generated list to the vendor using email, you must add the email address for the contact in the All Contacts or My Contacts view.

Defining Distribution Profiles for Vendors

Use the Communication Administration screen's Drivers and Profiles view to define communications profiles for email, fax, and FTP distribution of lists to vendors. Output file layouts and vendor profiles must be defined for all types of lists. If you are using email or FTP, you must also define Email Address, Distribution Method, and Distribution Profile in the Vendor profile. For more information about using delivery profiles, see *Siebel Marketing User Guide*.

Siebel Marketing provides default drivers in its library that can be modified for use when sending files to a vendor. An administrator can create distribution profiles for each of these driver types that override the default parameters for that driver. For more information about communications drivers and profiles, see *Siebel Communications Server Administration Guide*.

6

Designing Marketing Campaign Load Formats

This chapter describes how to design marketing campaign load formats. It includes the following topics:

- [Creating and Testing Campaign Load Formats on page 77](#)
- [About Marketing Integration Objects on page 84](#)

Creating and Testing Campaign Load Formats

Campaign load formats define the way campaign-related data is copied from a marketing data source into the Siebel transactional database for launching a campaign. You must define campaign load formats for your marketing data sources before you can use Siebel Business Application Integration (EAI) technology to import this information. For example, contact information such as first and last name, phone number, and email address can be brought into the Siebel database during campaign load only if you define campaign load formats for this data. The Campaign Load workflow process is used to manage the load process.

For information about creating a campaign load format for the Siebel Data Warehouse, see [“Examples of Recommended Campaign Load Mappings” on page 90](#).

This section contains the following topics:

- [Creating Campaign Load Formats on page 77](#)
- [Testing Campaign Load Formats on page 82](#)

Creating Campaign Load Formats

Before you begin creating campaign load formats, make sure the subject area in the Analytics Administration Tool includes the required fields to load new customers and execute your campaigns. For example, if you are loading contact data, you must verify that the Subject Area used for the Campaign Load Format includes Contact First Name, Middle Name, Last Name, and so on. For more information about creating Subject Areas for list formats, see *Siebel Analytics Server Administration Guide*.

Creating campaign load formats requires that you complete the following tasks that are described in this section:

- **Create a campaign load format and add columns.** Campaign load formats have columns that are always required, regardless of the type of customer data such as contacts, accounts, or prospects being loaded.

- **Enable system data expressions for required columns.** Several of the required Campaign Contact columns must be populated with values that are determined by the list generation process at run time. To accomplish this, you set up the Campaign Contact columns to use system data expressions.
- **Supply Integration Ids.** Every campaign load format requires an integration ID (referred to as Key 1) that supplies the enterprise-wide ID representing that customer. For example, most corporate data warehouses already have unique customer Ids assigned as the enterprise customer ID. Campaign load expects this column to be included in the campaign history.
- **Requalify list results against original criteria.** The members of the campaign load file must be evaluated against the segment criteria when generating the campaign load file. This option limits the information in the list file only to members of the segment (and any Qualified List Items constrained on the segment tree). There is no need to reload the campaign as it picks up the changes in the people who are added to the segment when the campaign is launched.
- **Set options, headers, and footers for campaign load formats.** In the header, you can add an integration object name but you must not add a system data expression.

To create a campaign load format and add columns

- 1 Using one of the following methods, navigate to the List Designer start page:
 - In the Siebel Marketing application, navigate to Administration - Marketing screen > List Formats.
 - If you log in to the Marketing module directly, click the Marketing screen tab and then click Create a List Format.
- 2 From the list of Subject Areas on the right, select a subject area that includes the required columns for your campaign load format.

The application provides some subject areas for this purpose, including the following:

- Campaign Load - Contacts
- Campaign Load - Accounts
- Campaign Load - Prospects

NOTE: Your administrator may have added additional subject areas.

- 3 Expand the folders in the selection panel and click each column name to add it to the format.
- 4 Verify that you have included the required columns for each integration object and integration component, based on the type of party being loaded (contacts, accounts, or prospects).

NOTE: The column label must exactly match the field name of the integration component in the Siebel enterprise application repository (siebel.srf). For information about required integration component fields, see [“Enabling and Synchronizing Marketing Server Components” on page 12](#) and [“Field Names for Marketing Integration Components” on page 186](#).

- a To rename a column label that does not exactly match the field name of the integration component, click the properties button.

- b Select the Custom Headings option.

If you use one of the standard subject areas listed in [Step 2 on page 78](#), the column names matches the field names in the integration components in the Siebel enterprise application.

- c Enter the necessary table and column heading.

The table heading must match the integration component name and the column heading must match the field name.

- 5 Select the following required columns to add them to the campaign load format:

- a From the Contact folder, add the Person UId column.
- b From the Campaign Contact folder, add the following columns:

Column	Description
Campaign Id	
Segment Id	
Load Number	
Token Number	
Scalability Batch Number	
Treatment Id	External Key. Treatment Id is now a required column. Depending on your upgrade history and system configuration, your current list formats may not include this column. If this is the case, add a System Data Expression for Treatment Id to the Analytics Web configuration files (see Configuring the System for New System Data Expressions on page 62) and add this expression as a column to your Campaign Load list formats (see Creating and Testing Campaign Load Formats on page 77).

[Table 14 on page 79](#) shows the mappings used in the preconfigured reports.

Table 14. External Key Mappings

Type of Party	Key	Party Id	Map to this Column Id
Contacts	Key 1	Contact Id	Contact.ROW_ID
Accounts	Key 1	Contact Id	Contact.ROW_ID
Accounts	Key 2	Account Id	Account.ROW_ID
Prospects	Key 3	Prospect Id	Prospect.ROW_ID

To enable system data expressions for required columns

- 1 Click the properties button on the column.

- 2 In the dialog box, first click the Custom Headings check box.
This makes sure the table and column name are not changed when you modify the formula in [Step 3 on page 80](#).
- 3 Clear the current formula from the Column Formula box.
- 4 Place your cursor in the Column Formula box, then click the Available System Data link.
- 5 Select the appropriate system data expression from the following list:

Column	Corresponding System Data Expression
Campaign Id	Campaign Id
Load Number	Load Number
Scalability Batch Number	Email Batch Number
Segment Id	Segment Id
Token Number	Token Number
Treatment Id	Treatment Id

The expression is added to the formula. For example, the Campaign ID column would show the following formula:

```
@{campaignID}{0}
```

NOTE: If you get an error message in the Formula dialog box, ignore the error.

- 6 Click OK.

To assign integration Ids

- 1 Choose the Column from the Subject Area that provides the Integration ID for the Contacts Target Level.
- 2 Select the column in the right pane.
- 3 Click the formula button in the column.
- 4 Check the Custom Headings box.
- 5 Delete the existing formula and replace it with the appropriate value from [Table 14 on page 79](#).
- 6 Click OK.

To requalify list results against original criteria

- 1 In the Columns view, in the Filters pane, select the following check box:
Re-qualify list results against original segment criteria
- 2 The following line is automatically added to the filter criteria:
Re-qualified against original segment criteria

To set options, headers, and footers for campaign load formats

- 1 Click the Options tab and select the following options:

Attribute	Option
Purpose	Campaign Load
(choose format)	Delimited File
End of Field Delimiter	Comma
Text Qualifier	""
Max # Records	1000

- 2 Click the Headers and Footers tab.
- 3 Enter the integration object name to load, using the following format (example also shown):

Format	Example
# <i>integration object name</i>	# Marketing Contact
#	#

CAUTION: You must not add additional text or a system data expression to the header. Additionally, do not press enter at the end of the second line. For EAI formatting, there must not be an end-of-line character at the end of the header.

- 4 Verify your campaign load format by previewing some sample contents of the list format.
NOTE: For instructions about how to preview a list format, see [“Previewing a Marketing List Format” on page 69](#).
- 5 When you obtain the expected results, click the save icon to save your work.

Siebel Contact and Campaign History Tables

When you load a campaign, the Campaign Load workflow process modifies data in the Siebel database after the Contact a integration component is mapped and the campaign load mapping data is modified.

- **Contacts table (S_CONTACT).** The Contacts table stores contact-level information.
- **Campaign History table (S_CAMP_CON).** The Campaign History table contains the history of contacts that qualify for campaigns, as well as the Campaigns ID, Segment ID, Wave Number, and so on.

If you include optional integration component fields such as Account or Contact Address in the campaign load format, other tables are updated with data according to the integration fields that are mapped.

For every record that qualifies for a campaign, the Campaign Load process uses the Contact component user key to determine if the contact record exists. [Table 15 on page 82](#) contains the table update rules.

Table 15. Campaign Load Table Update Rules

Siebel Contact Record	S_CONTACT	S_CAMP_CON
Exists	Update existing record	Insert new record
Does not exist	Insert new record	Insert new record

NOTE: If you use the Marketing Contact integration object, the lookup uses the User Key fields for Contacts and Accounts. [Figure 1 on page 85](#) shows the integration components for the Marketing Contact integration object. If you use the Marketing Person integration object, the lookup only requires the Campaign Id, Load Number, Token Number, Contact Id, or Prospect Id to confirm that the person is present in the transaction database.

Testing Campaign Load Formats

To verify that you have created a valid Campaign Load Format, a best practice is to build a test campaign and test segment.

To test your campaign load mapping

- 1 Verify that you have included the minimum required fields for each integration component. For more information, see [“About Marketing Integration Objects” on page 84](#).
- 2 Confirm that the Campaign Load Format includes the required columns for all formats:
 - Campaign Id
 - Segment Id
 - Load Number
 - Batch Number
 - Token Number
 - Treatment Id
- 3 Confirm that the parent integration component is mapped for every child component. For example, if you included Account Address fields, ensure that you also included Account Name and Location.
- 4 Create a test segment using the Segment Designer. For the segment, go to the Advanced Options tab and change the Campaign Load List Format to use your new Campaign Load Format. Save the segment.
- 5 Create a new campaign under the Campaigns screen tab.

- 6 In the Design tab, perform the following steps:
 - a Click the Offers link.
 - b In the Offers list, click New.
 - c In the Add Offer dialog box, choose a test offer and click OK.
 - d In the Treatments list at the bottom of the view, click New.
 - e In the Pick Treatment list, choose a test treatment.
- 7 In the Design > Segments/Lists view for the Campaign, click Add Segment to choose your test segment.
 - a Click the Segments/Lists link.
 - b In the Segments/Lists list, click Add Segment.
 - c In the Previously Used Segments dialog box, click Choose a new Segment.
 - d Locate and select your test segment.

In the Allocation matrix at the bottom, a check box will appear for the treatments you associated in [Step 6](#).
 - e Check the check box and click Save.
- 8 Click the menu on the upper form for the campaign and choose 'Load Campaign'. In the dialog box, confirm the load time and click OK to submit.
- 9 Navigate to the Execute > System Tasks view to monitor whether the Campaign Load task successfully completed. Investigate any error messages that appear in the Task Log.
- 10 After the load completes successfully, validate that the data loaded matches the expected information.
 - a While your campaign is still selected, navigate to All Contacts/Prospects across Organizations and query for the campaign members for that Load Number. If desired, export these rows to a file using the Export menu command.
 - b Navigate to Administration - Marketing screen > Marketing Server Admin > Manage Marketing Jobs. Find the Marketing Job that you generated with the type WriteListFiles. Open the details link and find the network path to the file that was generated.
 - c Compare the contents of the file and the data that was loaded into your campaign to confirm that the data was complete and correct.
- 11 Make any changes required to the Campaign Load Format using the List Format Designer. Be sure to save any changes to the Format.
- 12 When completed, purge the load history by performing the following steps:
 - a Navigate to the Campaigns screen and click the campaign.
 - b In the Execute tab, click Suspend Wave.

NOTE: You must suspend the waves in the load before you can purge a load.
 - c In the Execution Status view, click Purge Load, and then delete your test campaign.

About Marketing Integration Objects

For each campaign load format, you must select only one of the following integration objects:

- **Marketing Contact integration object.** If any campaign contact names do not exist within the Siebel transactional database, you must use the Marketing Contact integration object. It provides the field mappings necessary to import new contacts and accounts. For more information, see [“About the Marketing Contact Integration Object” on page 84](#).
- **Marketing Prospect integration object.** If any prospect names from your target segment do not exist within the Siebel transactional database, you must use the Marketing Prospect integration object. It provides the field mappings necessary to import new prospects. For more information, see [“About the Marketing Prospect Integration Object” on page 88](#).
- **Marketing Person integration object.** If your campaign contacts and prospects exist within the Siebel transactional database prior to loading any campaigns, then you can also use the Marketing Person integration object. Typically, this configuration occurs for installations that use the Siebel Data Warehouse populated from the Siebel transactional database and that do not introduce new customers into the Siebel Data Warehouse from other sources. Because the contact and prospect field information is already recorded, to load the campaign in this configuration, you only need to map the Contact and Prospect IDs between the data warehouse and Siebel transactional database. For more information, see [“About the Marketing Person Integration Object” on page 89](#).

The application does not provide an integration object that can insert new contacts and prospects simultaneously in the same load.

This section contains the following topics:

- [About the Marketing Contact Integration Object on page 84](#)
- [About the Marketing Prospect Integration Object on page 88](#)
- [About the Marketing Person Integration Object on page 89](#)
- [Examples of Recommended Campaign Load Mappings on page 90](#)

About the Marketing Contact Integration Object

The Marketing Contact integration object provides field mappings to typical contact- and account-related information from the external data sources. The predefined integration object, Marketing Contact, defines the information that is exchanged between the external data source and Siebel Marketing, using EAI technology. For more information about EAI, see *Overview: Siebel Business Application Integration Volume I*. For a list of fields for the Marketing Contact integration object, see [“Field Names for Marketing Integration Components” on page 186](#).

Figure 1 on page 85 shows the integration components for the Marketing Contact integration object. Required fields apply when a new contact is inserted into the Siebel transactional database.

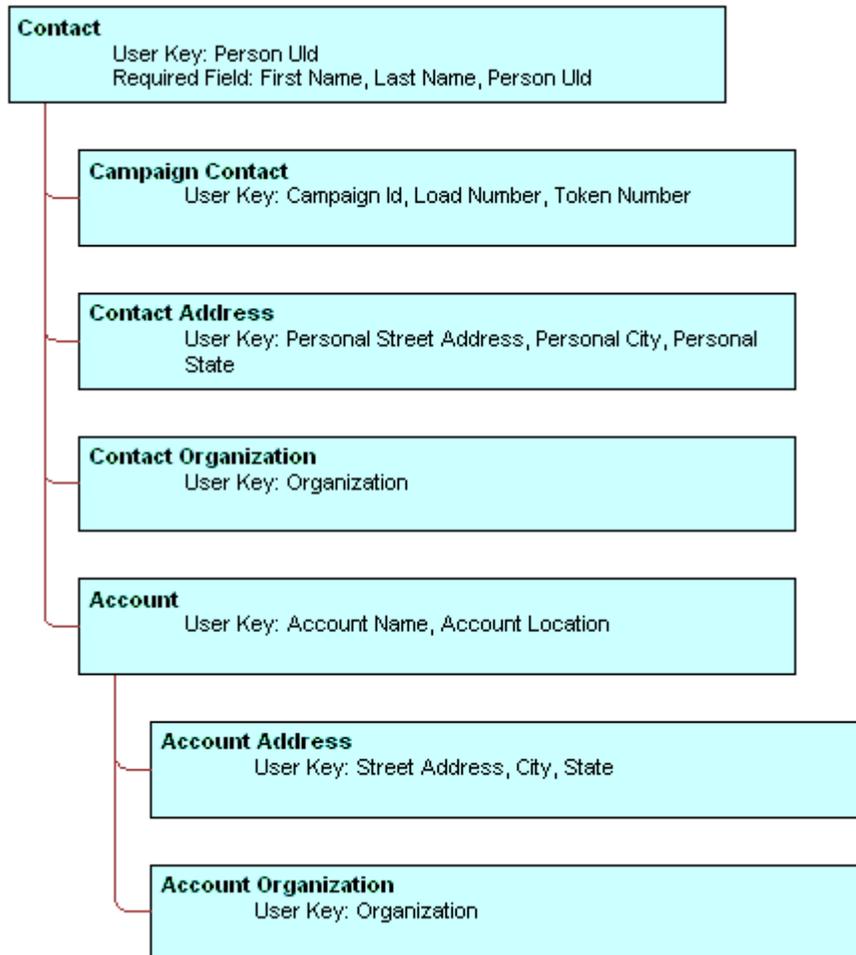


Figure 1. Marketing Contact Integration Components

During campaign load, integration component User Keys determine if a record already exists in the component (for the given values) and if the record is unique. Required fields cannot be a null value for the new record.

Table 16 on page 85 describes the Marketing Contact integration components.

Table 16. Marketing Contact Integration Component Description

Component	Comment
Account	Maps account information associated with the contact.
Account Address	Maps the account address.

Table 16. Marketing Contact Integration Component Description

Component	Comment
Account Organization	Maps information about the account's organization.
Campaign Contact	Maps campaign history-level information such as campaign Id, load number, wave number, contact Id, prospect Id, account Id, and the keys that bind contacts with their unique IDs in the data warehouse.
Contact	Maps contact-level information such as the contact's name, telephone number, email address, and so on.
Contact Address	Maps the contact's address information.
Contact Organization	The Contact Organization component maps information about the contact organization.

Mapping Rules for the Marketing Contact Integration Components

Using contact information for campaign load requires the following integration components:

- **Contact.** Includes information such as contact first name, contact last name, and so on.
- **Campaign Contact.** Fields must be mapped in the campaign load report. Mapping includes the required campaign load columns and the keys that store unique IDs from the data warehouse for the party (contacts, prospects, or accounts) being loaded.

Use the following rules when mapping components:

- A parent integration component must be mapped before mapping a child component. For example, the Account Address component cannot be mapped unless Account is mapped.
- User Key fields must be mapped for each integration component if one or more fields for the component is mapped.
- Required fields must be mapped for each integration component if one or more fields for the component are mapped.
- Make sure that the campaign load format includes a column indicating the organization in which the contact and account data must be loaded.

Sample Mappings for Contact Key Components

The combination of keys that are mapped in the campaign load report depend upon the target levels that you use.

Table 17 describes examples of Key mappings for sample target levels.

Table 17. Key Mappings for Sample Target Levels

Target Level	Key Mapping
Contacts	Key 1
Accounts	Key 2
Prospects	Key 3
Households	Key 4

Changes for Segmentation Bridge Users

If you use the Marketing Segmentation Bridge to execute campaigns in Siebel Marketing 6.3, 7.0, or 7.5, the campaign load formats have a some modifications from the 7.7 format.

Segmentation Bridge User Key columns

To populate campaigns in Siebel 6.3, 7.0, and 7.5, modify the required user key columns to match the user keys in the pre-7.7 version of Siebel Marketing. Table 18 shows the integration components and required columns for Siebel Marketing versions 6.3, 7.0, and 7.5.

Table 18. Required Columns for the Marketing Contact Integration Object for Siebel Marketing versions 6.3, 7.0, and 7.5

Integration Component	Field	Comment
Campaign Contact	Campaign Occurrence Id	
	Scalability Batch Number	
	Segment Id	
	Token Number	
	Wave Id	Optional
Contact	First Name	
	Last Name	
	Person UId	
Contact Key	Family Level Id	Optional
	Key 1	
	Master Key	Optional

When you move your environment from a segmentation bridge environment to a nonbridged environment (Siebel Enterprise and Marketing Server on the same version), make the following changes to convert your campaign load format:

- Remove the Family Level Id and Master Key columns; they are no longer needed.
- Replace the Campaign Occurrence Id column with Campaign Id.
- Add the Load Number column. This is a new user key column in 7.7.

End of Line Character

To populate campaigns in Siebel 6.3, 7.0, and 7.5, the end of each line of the campaign load file (loaded by EAI) must have a tilde character (~) concatenated to the end of the last column. In a nonbridged environment, the tilde character is not required. Modify the column formula for the last (rightmost) column to remove the concatenation.

Campaign Load File Header Modifications

To populate campaigns in Siebel 6.3, 7.0, and 7.5, the campaign load file (the EAI file) required a header with the following four lines:

```
# Marketing Contact  
# TIME : mm/dd/yyyy hh: mm: ss  
# @{recordCount}{0}  
#
```

A nonbridged environment requires only two lines. For nonbridged environments, remove the time stamp and record count lines from the bridge version as follows:

```
# Marketing Contact  
#
```

Remove the extra lines from your EAI header.

About the Marketing Prospect Integration Object

The Marketing Prospect integration object provides field mappings to typical prospect information from marketing data source(s). The required fields are fields that cannot be a null value for the new record.

Figure 2 on page 88 shows the integration components for the Marketing Prospect integration object. Required fields apply when a new prospect is inserted into the Siebel transactional database.

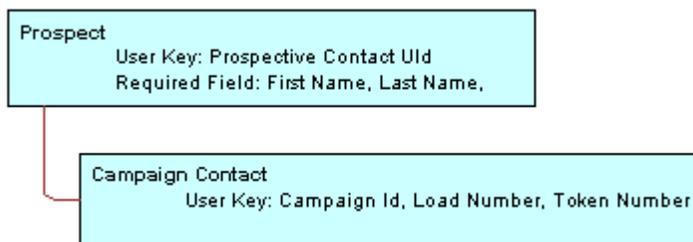


Figure 2. Marketing Prospect Integration Components

For a list of fields for the Marketing Prospect integration object, see [“Field Names for Marketing Integration Components” on page 186](#).

Table 19 on page 89 describes the Marketing Prospect Integration components.

Table 19. Marketing Prospect Integration Component Description

Component	Comment
Campaign Contact	<p>Maps campaign history-level information.</p> <ul style="list-style-type: none"> ■ User Key: Campaign Id, Load Number, and Token Number
Prospect	<p>Maps prospect information.</p> <ul style="list-style-type: none"> ■ User Key: Prospect Contact UId ■ Required fields: First Name, Last Name, and Prospective Contact UId

NOTE: Required fields apply when a new contact is inserted into the Siebel transactional database.

Mapping Rules for the Marketing Prospect Integration Components

Using prospect information for a campaign load requires the following integration components:

- Prospect. Includes information such as prospect first name, prospect last name, and so on.
- Campaign Contact. Fields must be mapped in the campaign load report. Mapping includes the required campaign load columns and the keys that store unique IDs from the data warehouse for the prospects being loaded.

About the Marketing Person Integration Object

Most deployments of the Siebel Marketing application use the Marketing Contact integration object for loading campaign data. The Marketing Contact integration object is most commonly used because it supports inserting new contact and account names into the transaction database. In contrast, the Marketing Person integration object only supports inserting new records into the Campaign History table for contacts or prospects that already exist in the transaction database.

When all the customer data resides in the Siebel transaction database, the load process can avoid inserting new customers and improve the load time. The Marketing Person integration object supports this simple lookup load process.

Only use the Marketing Person integration object when all target contacts, accounts and prospects in the campaign already exist in the transaction database. The only required mapping is between the Row ID from the Contact and Prospect tables in the Siebel transactional database and the external data source, typically the Siebel Data Warehouse. For a list of fields for the Marketing Person integration object, see [“Field Names for Marketing Integration Components” on page 186](#).

Figure 3 on page 90 shows the integration components for the Marketing Person integration object. Required fields apply when a new campaign contact record is inserted into the Siebel transactional database.

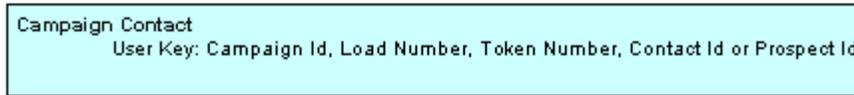


Figure 3. Marketing Person Integration Components

Table 20 on page 90 describes the integration component for the Marketing Person integration object.

Table 20. Marketing Person Integration Component Description

Component	Comment
Campaign Contact	<p>Maps the required campaign history columns and keys that store the unique IDs from the data warehouse for the party being loaded.</p> <p>User Key: Campaign Id, Load Number, Token Number, and one or more of the following:</p> <ul style="list-style-type: none"> ■ Contact Id ■ Prospect Id

Mapping Rules for the Marketing Person Integration Components

When creating a campaign load mapping using the Marketing Person integration object, use the following guidelines:

- The Contact Id and Prospect Id values imported from the external data source must match the Row IDs for the Contact or Prospect in the contact or prospect tables.
- If all incoming target names are contacts, then mapping the Prospect Id is not required. Alternatively, you could use the Marketing Contact integration object. If all incoming target names are prospects, then you do not need to use Contact Id. If the target list includes both contacts and prospects, then both fields are required.

Examples of Recommended Campaign Load Mappings

Campaign Load Mappings depend on the following:

- **The Data source.** The data source includes Siebel Data Warehouse, Siebel transactional database, or a data source other than Siebel applications.
- **The Data elements required to be imported.** These elements include Contact fields, Account fields, Contact address, and so on.

- **Contact Qualification.** Determine if new contacts or existing contacts qualify for a campaign.
- **Presence of contacts and prospects in the Siebel database.** Determine if all contacts and prospects are already present in the contact and prospect tables in the Siebel database.

This section contains descriptions of mappings with the name of the sample campaign load format report in which the recommended mappings appear. The examples listed in the following topics can be found in the following location in the Siebel File System: Shared Campaign Load Formats/Marketing/Example List Formats

Examples of Mappings to the Siebel Data Warehouse

These mappings are applicable when campaigns are run against Siebel Data Warehouse.

- **Recommended Mappings for Existing Contacts And Prospects.** See the following sample campaign load format report:

Campaign Load - Contacts and Prospects Example

- **Recommended Mappings for Existing Accounts.** See the following sample campaign load format report:

Campaign Load - Existing Accounts

Examples of Mappings to the Siebel Database

The mappings shown in the following reports are applicable when campaigns are run on Oracle's Siebel database.

- **Recommended Mappings for Contacts And Prospects.** See the following sample campaign load format report:

Campaign Load - Contacts and Prospects Example

- **Recommended Mappings for Accounts.** See the following sample campaign load format report:

Campaign Load - Existing Accounts

Examples of Mapping to a Non-Siebel Database

The mappings shown in the following reports are applicable when campaigns are run on a non-Siebel database.

- **Recommended Mappings for New Contacts.** This is for cases where some of the contacts being loaded for the campaign do not exist in the Siebel database. See the following sample campaign load format:

Campaign Load Contacts - Example

- **Recommended Mappings for New Accounts.** This is for cases where some of the accounts being loaded for the campaign do not exist in the Siebel database. See the following sample campaign load format:

Campaign Load Accounts - Example

- **Recommended Mappings for New Prospects.** This is for cases where some of the prospects being loaded for the campaign do not exist in the Siebel database. See the following sample campaign load format:

Campaign Load Prospects - Example

7

Installing and Configuring Email Marketing

This chapter describes how to install and configure Email Marketing. It includes the following topics:

- [About Installing and Configuring Siebel Email Marketing on page 93](#)
- [Siebel Email Marketing Architecture on page 99](#)
- [Requirements for Installing Email Marketing on page 101](#)
- [Installing the Email Marketing Server on page 104](#)
- [Configuring Email Marketing Daemons on page 109](#)
- [Final Test of Email Marketing Components on page 121](#)
- [SOAP Calls for Marketing on page 124](#)

About Installing and Configuring Siebel Email Marketing

The Siebel Email Marketing Server is a combination of components designed to support high volume, personalized email messages and track email bounces and click-through responses. The Siebel Email Marketing Server consists of the following three components, each with its own installer and each is separate from the Siebel Marketing Server installer:

- The Email Sending Daemon (ESD). Assembles each outbound email message for a campaign using the email template (HTML or text) and the recipient list, and then sends each message to your company's outbound MTAs for delivery.
- The Bounce Handler Daemon (BHD). Tracks email messages that cannot be delivered, parses the returned email messages, and records the cause of the bounce.
- The Click-Through Daemon (CTD). Tracks clicks made by the email recipient on any Siebel-supported hyperlinks included in the email template.

This section contains the following topics:

- [Example of Email Delivery on page 94](#)
- [The Siebel Email Marketing Server Installation on page 96](#)
- [Email Sending Daemon \(ESD\) on page 96](#)
- [Bounce Handler Daemon \(BHD\) on page 96](#)
- [Click-Through Daemon \(CTD\) on page 97](#)
- [Frequently Used Terms for Email Marketing on page 98](#)

Example of Email Delivery

A good understanding of email delivery is helpful in understanding the key principles and items presented in the following topics. The provided example is a simplified description of the email delivery process and describes one email being sent. When you send thousands or millions of emails, the process becomes more complex. Siebel Email Marketing is designed to address the issues associated with sending a large volume of emails.

When an email is sent by person A to person B, an attempt is made to deliver the email. The first step in the process occurs when the user clicks Send in their email client. The email client tries to initiate a connection to an email server.

NOTE: This email server is often called a Mail Transfer Agent (MTA) because of its function or a Simple Mail Transfer Protocol (SMTP) Server because of the protocol it uses.

When the client has a connection to a Mail Transfer Agent, the Mail Transfer Agent and the client communicate using the Simple Mail Transfer Protocol. The following are important parts of this communication:

- One critical piece of this communication involves the transfer of the email message to the Mail Transfer Agent.
- Another piece of this communication is the passing of the sender's email address. This email address is often referred to as the SMTP envelope from (or sender) address. The use of the term envelope represents the email content as a letter and the SMTP communication as the envelope used to carry the letter.

If the recipient of the email (person B) has their mailbox on this server, then the server drops the email in the box and the job is done. If person B is on another domain, the Mail Transfer Agent executes a Domain Name Service (DNS) lookup to find the address of another Mail Transfer Agent to communicate with. Another Simple Mail Transfer Protocol conversation occurs and the second Mail Transfer Agent receives the message and delivers it to the mailbox for person. When it is in person B's mailbox, the recipient can retrieve it using another protocol such as Post Office Protocol (POP) and read the message in an email application.

Unexpected issues can occur during this process. For example, the domain of the recipient can be unreachable or not exist at all. In this case, an error message, or bounce, is created by the Mail Transfer Agent that identifies the problem and the bounce is returned to the sender of the message (the sender's email address is also called the from address of the SMTP envelope). Another problem may be that the domain has been found but the user does not exist on that domain. Again, a bounce is created and sent back to the sender of the original message. Both of these are examples of hard bounces. This means that not only was the email unable to be delivered but that it can never be delivered. Another type of bounce is a soft bounce, which means that although the email could not be delivered at present, it may be possible to deliver the message in the future. [Table 21](#) lists the possible bounce codes.

Table 21. Bounce Codes

Bounce Code	Description
Address Moved	The recipient has changed the email address and the new address is available. This occurs rarely.
Bad Sender	The email address is bad: either the address is misformatted (unlikely) or there is no such user.
Last Resort	The bounce parser could not determine the type of bounce, but it has the name of the original recipient.
Mailbox Problem	The email address exists, but the mailbox is full or temporarily locked. This occurs rarely.
Message Too Large	The message size exceeds the recipient's allowable limit.
Network Problem	Because of network problems, the MTA is unable to connect to either the receiving Mail Server or some other necessary server (such as a company's LDAP server). This occurs rarely.
Protocol Problem	The receiving Mail Server does not work with the version of SMTP the MTA uses. This occurs rarely.
Security Problem	The receiving Mail Server does not allow email from your domain. This can occur when the receiving Mail Server blocks domains of known or suspected spammers.
System Problem	The receiving email server is having technical problems and cannot accept mail right now.
Unparsable	The bounce parser could not classify the bounce message into any other category.
Vacation	The recipient has activated a vacation mail response. This error message occurs rarely because vacation responses do not get sent to the same place bounces do and also because vacation messages are quite varied, making it hard for the bounce parser to identify them.

The Siebel Email Marketing Server Installation

The Siebel Email Marketing Server consists of three components, each of which comes with its own installer and is separate from the Siebel Marketing Server installer. The installation media for the three Email Marketing Server components are distributed together on media separate from the Siebel Enterprise installation media.

The following is a summary of the issues to consider when installing the different components of Siebel Email Marketing. The Email Marketing components can reside outside the firewall, with ports opened for SISNAPI, SOAP (HTTP), and networked file system access through the firewall. Alternatively, the Email Marketing components can reside inside the firewall with ports 80 and 25 opened on the firewall (or proxies) or relays put in place.

These components talk to the Siebel Marketing Server using the Siebel Java Data Bean over the Siebel Internet Session API (SISNAPI). For more information about the Siebel Java Data Bean, see the topic about integrating with the J2EE Application server in *Transports and Interfaces: Siebel Business Application Integration Volume III*.

Email Sending Daemon (ESD)

The Email Sending Daemon assembles an email to be sent to a list or segment of contacts and prospects and delivers each email to the corporate outbound Mail Transfer Agents. Assembly includes adding headers in front of the email message content and merging personalized data into the message content.

The Email Sending Daemon listens on port 80 for SOAP requests from the Siebel Marketing Server. A SOAP request includes the filename of the email message content, the email message headers, and the Marketing Server subwave contacts and prospects list (containing mail merge data). These files are found in the Marketing File System which is commonly a networked directory accessible to the Email Sending Daemon. The Email Sending Daemon must be able to communicate with one or more outbound Mail Transfer Agents to send mailings over the internet. The Email Sending Daemon must be able to tell the Marketing Server when it has completed a subwave as well as deliver details of email address errors that occurred while it communicated using Simple Mail Transfer Protocol to the Mail Transfer Agents (called synchronous bounces). Communications with the Siebel Marketing Server use SISNAPI protocol.

The most common placement for the Email Sending Daemon is within the corporate network, behind the DMZ. However, the Email Sending Daemon component can be placed inside the DMZ or outside the firewall, if there is a port opened to connect to the Siebel Marketing Server using SISNAPI protocol, SOAP, and the networked Marketing File System.

Bounce Handler Daemon (BHD)

Typically, the Bounce Handler Daemon receives and processes bounced mail on port 25 (the default SMTP port).

Email messages that have bounced appear similar to regular email, though their email message content and headers probably have noticeable differences in content. For a bounced email to be returned to the Bounce Handler Daemon, the original email must have a usable return address (the SMTP envelope from address). The correct SMTP envelope from address is generated for you using the Bounce Handler Daemon's domain name (supplied by you when you configure the Email Marketing Server).

The recommended approach is to place the Bounce Handler Daemon machine in the DMZ. However, some network support technicians may want to place the Bounce Handler Daemon behind an inbound Mail Transfer Agent. The approach that you choose depends on the configuration of your network, DMZ, existing inbound Mail Transfer Agent, and firewall. The following example describes a typical approach:

You may have a domain name of oracle.com and an inbound Mail Transfer Agent (in this example mail.oracle.com) for mail to that domain. The Mail Transfer Agent mail.oracle.com currently routes email successfully to machines in the internal network. It may be in the DMZ with a special hole for port 25 traffic or straddling the outer firewall with one NIC in the DMZ and the other NIC on the Internet. The Bounce Handler Daemon may be running inside the DMZ, with an internal-only hostname such as oracle-host.internal.oracle.com.

In this example, you would choose a Bounce Handler Daemon hostname such as bounces.oracle.com that is not already used by external DNS and then and perform the following steps:

- Configure the Bounce Handler Daemon to use this hostname.
- Add a DNS MX record for this hostname to an internal DNS server that can be contacted by the inbound Mail Transfer Agent (mail.oracle.com).
- Add this hostname to the Internet DNS servers as a hostname with an IP address for the inbound Mail Transfer Agent.

Because the Internet DNS MX records for bounce.oracle.com point to the inbound Mail Transfer Agent, bounced email for the Bounce Handler Daemon is sent there first. Mail.oracle.com must be configured to relay the mail for bounces.oracle.com to the Bounce Handler Daemon using the internal DNS server for the correct internal IP address.

Organizations often create IP numbers that cannot be routed within their enterprise. For example, IP numbers starting with 10.* or 192.168.* are only available inside the enterprise. Similarly, organizations often have hostnames, such as my-machine.corp.oracle.com, that are only visible inside the company network. If you use an IP address or hostname that is only available inside your company network for your Bounce Handler Daemon hostname, Mail Transfer Agents outside your network can not connect to the Bounce Handler Daemon. Therefore, the Bounce Handler Daemon server must be available, directly or indirectly, from outside your network.

Click-Through Daemon (CTD)

The Click-Through Daemon listens on port 80 for HTTP requests (Click-through, Message Open, Forward to a Friend and un-subscription/subscription requests). This component can be placed in the DMZ, inside or outside the firewall, if a port is opened that allows it to connect to the Siebel Marketing Server using SISNAPI protocol. Web proxy servers can be used to route the HTTP requests to the Click-Through Daemon server.

Frequently Used Terms for Email Marketing

Table 22 on page 98 contains acronyms and terms frequently used in Email Marketing.

Table 22. Frequently Used Terms for Email Marketing

Term	Definition
BHD	Bounce Handling Daemon. Processes asynchronous bounced email (bounces that do not occur in the SMTP communications between the Email Sending Daemon and the Mail Transfer Agent).
Bounce	An email that is returned due to a temporary or permanent error condition. There are hard bounces and soft bounces as described in the following list: <ul style="list-style-type: none"> ■ Hard bounce. The email was not delivered and can never be delivered. For example, if the email address is invalid. ■ Soft bounce. The email cannot be delivered because of a temporary problem such as a full mailbox and can be delivered when the problem no longer exists.
CTD	Click Through Daemon. Handles the following customer actions: <ul style="list-style-type: none"> ■ Unsubscribe and Subscribe so contacts can opt in or opt out of email lists. ■ Forward to a Friend provides method for capturing new email addresses. ■ Related URLs track customer clicks an embedded link in an email. ■ Read Receipts logs message opens.
Daemon	A program that is not invoked explicitly, but is dormant waiting for an action or event to activate it.
DNS	Domain Name System. Created to provide a way to translate domain names to their corresponding IP addresses. The DNS server maintains a list of domain names and IP addresses and each request is pointed to the correct corresponding IP address.
DMZ	Demilitarized Zone. A section of your corporate network that acts like a neutral zone or buffer between your internal network and the Internet. It is created by placing one firewall between the outside (internet) and Web servers, and a second firewall between the Web servers and your internal network. External users can access servers in the neutral zone, but not servers on the internal network. The servers in the DMZ handle incoming and outgoing traffic.
DNS groups	DNS domain names are categorized into groups called a record and each record is given a special name such as MX or A. <ul style="list-style-type: none"> ■ MX (type of record). Specifies a domain name which can receive and possibly relay emails. This domain probably contains a server hosting an MTA. ■ A (type of record). Maps a domain name to an IP address.

Table 22. Frequently Used Terms for Email Marketing

Term	Definition
ESD	Email Sending Daemon. Manages the following tasks: <ul style="list-style-type: none"> ■ Email Construction and Personalization. ■ Delivery of outbound email to Mail Transfer Agents. ■ Synchronous bounced email. Bounces that occur in the SMTP conversation between the Email Sending Daemon and the MTA.
MTA	Mail Transfer Agent. A program responsible for receiving, routing, and delivering email messages. MTAs receive email messages and recipient addresses from local users and remote hosts, perform alias creation and forwarding functions, and deliver the messages to their destinations. An MTA is sometimes called a Mail Transport Agent, a mail router, an Internet mailer, or a mail server program. Commonly used MTAs include sendmail, qmail, and Exim.
SISNAPI	Siebel Internet Session Network Application Programming Interface. A proprietary Siebel network protocol used for communications to and from Siebel Components.
SMTP	Simple Mail Transport Protocol. Used to move each email over the Internet.
SOAP	Simple Object Access Protocol. The use of XML and HTTP to access services, objects, and servers in a platform-independent manner. For more information about SOAP, see <i>Siebel Analytics Web Services Guide</i> .

Siebel Email Marketing Architecture

Figure 4 on page 100 is an example of a typical architectural structure for Siebel Email Marketing components and shows how the components interact with Siebel Marketing.

If Siebel Email Marketing components lose connectivity to the Siebel Server, they queue all data and continue to function. After the connection is reestablished, queued data is processed.

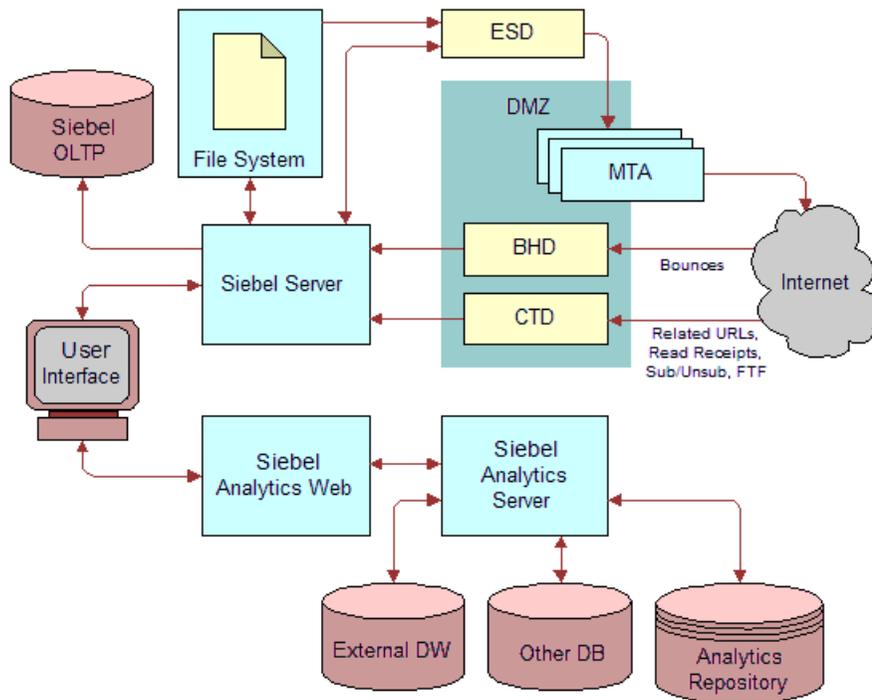


Figure 4. Email Marketing Architecture

Email Sending Daemon Integration and Workflow

Figure 5 on page 101 shows a more detailed view of the Siebel Email Sending Daemon, its interrelationship with Siebel Marketing, and the outbound flow of work within this architecture. The following steps correspond with the numbers in the figure:

- 1 Workflow calls Analytics Web to generate a list that is formatted for email personalization.
- 2 Siebel Analytics Web generates list files for each batch (subwave). In Basic mode, the Siebel Server generates the list files. In Advanced mode, the Analytics Web Server generates the list files.
- 3 Workflow waits until files are returned.
- 4 Workflow launches a subprocess for each file and then notifies the Email Sending Daemon location of each file.
- 5 Email Sending Daemon retrieves each subwave list of Prospects and Contacts.

- 6 Email Sending Daemon sends email to the Prospects and Contacts in each subwave list.

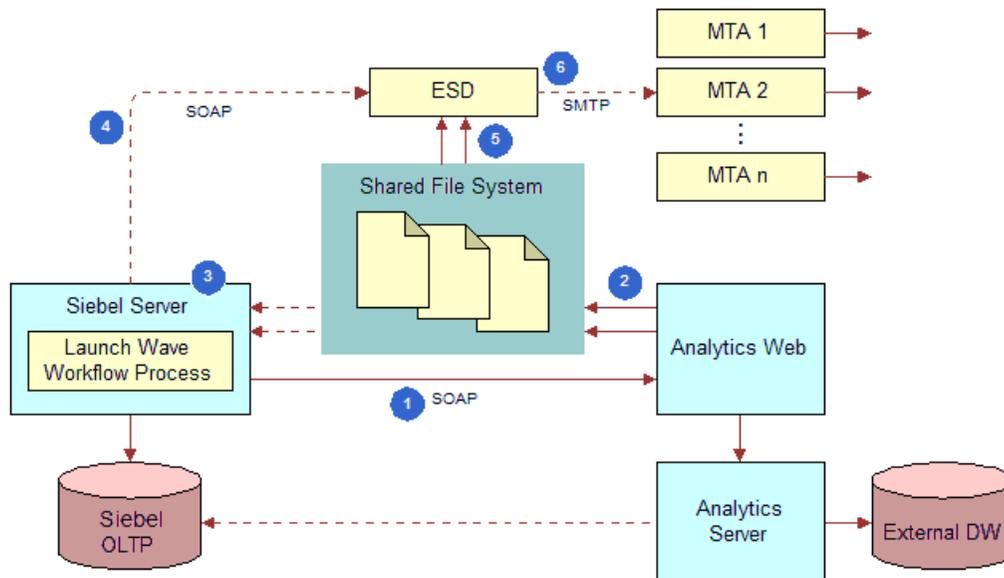


Figure 5. Email Sending Daemon Integration and Workflow

Requirements for Installing Email Marketing

Before installing Email Marketing, you must perform the following tasks:

- “Configuring Basic and Advanced Email Personalization” on page 101
- Removing an Existing Version of the Email Marketing Daemons on page 103
- Install the Java Software Development Kit (SDK) on page 104
- Verifying the Object Manager Component is Enabled and Running on page 104

Configuring Basic and Advanced Email Personalization

Your application can be configured to use one of two methods for email merge fields:

- **Basic.** The Basic mode is used when your organization has not licensed or deployed the marketing segmentation module, or if your requirements do not call for advanced merge fields. This option uses a fixed set of merge fields based on the available fields in the campaign recipient business component. In this mode, the email list is generated directly from the business component and delivered to the Email Sending Daemon for sending the email messages.

- **Advanced.** The Advanced mode is only available if your organization has deployed the marketing segmentation module. This option provides a flexible set of merge fields based on data from any data source or table accessed by the Siebel Analytics repository. The merge fields are determined by the fields in the Personalization Format (Email Server list format) that you select for the email offer.

To configure basic email personalization mode

- 1 Navigate to Administration - Server Configuration > Servers.
- 2 Select a server.
- 3 In the Components tab, query for the Marketing component.
- 4 Click the Parameters tab for this object manager.
- 5 Query for the Email Personalization Format parameter.
- 6 Make sure the Value field is set to any value other than a path name. For example, set it to Default Merge Fields. Using a nonpath name as a value enables Basic Personalization.

The Advanced Personalization Mode requires that you install the Marketing Module for segmentation and list generation and configure the required marketing metadata for list export. Perform the following steps to setup Advanced Email Personalization.

To configure advanced email personalization mode

- 1 Configure the marketing metadata for list generation. For instructions, see the *Siebel Analytics Server Administration Guide*.
- 2 Create one or more Email Server List Formats in the List Format Designer. For instructions, see [Defining Email Server Formats on page 52](#).
- 3 Designate one of the list formats as the default Email Personalization format for the application. This set of merge fields populates for any new email offers that are created.
 - a Navigate to Administration - Server Configuration > Servers > Components.
 - b In the components list, query for the Marketing (ENU) component.
 - c Click the Parameters view tab.
 - d In the Component Parameters list, query for the Email Personalization Format parameter.

The initial value is Default Merge Fields.
 - e To change the default system email list format to another email list format, enter the full Web catalog path in the Value on Restart column. For example:
`/shared/Marketing/Example List Formats/Advanced Merge Fields`
 - f If the catalog path is too long to enter in the parameter column, you may need to shorten the folder and list format name in the Analytics Web catalog.

Removing an Existing Version of the Email Marketing Daemons

If you have an existing version of the Email Sending Daemon, Bounce Handling Daemon, and Click-Through Daemon, you must remove them before proceeding with this install.

To remove existing Email Marketing daemons on Windows 2000 Server

- 1 From the Start menu choose Settings > Control Panel > Administrative Tools > Services.
- 2 Stop the services for Email Marketing daemons.
 - a Right-click the existing Email Sending Daemon service (labeled esd) and select Stop.
 - b Right-click the existing Bounce Handler Daemon service (labeled bhd) and select Stop.
 - c Right-click the existing Click-Through Daemon service (labeled ctd) and select Stop.
- 3 Return to the Control Panel and select Add or Remove Programs.
- 4 To remove each daemon, perform the following steps (following the instructions in each dialog box):
 - a Select the Email Sending Daemon program and click Change/Remove.
 - b Select the Bounce Handler Daemon program and click Change/Remove.
 - c Select the Click-Through Daemon program and click Change/Remove.
- 5 Locate the directory where the following Email Marketing daemon programs were installed and remove the daemons.

NOTE: After the uninstall, some files that could cause problems for the new installation may remain. Deleting files in these directories makes sure that the new installation does not inherit outdated information.

- The default installation location for Email Sending Daemon is C:\Program Files\esd.
- The default installation location for Bounce Handler is C:\Program Files\bhd.
- The default installation location is C:\Program Files\ctd.

To remove existing Email Marketing daemons on a UNIX server

- 1 Log in as root.

The Root user has the rights to install and remove applications.
- 2 To remove the Email Sending Daemon program, perform the following steps:
 - a Navigate to the directory where the Email Sending Daemon program was installed and, if it is running, stop the Email Sending Daemon using the following command:

```
./tomcat-ctl.sh stop
```
 - b Navigate to the parent directory where the Email Sending Daemon program was installed and remove the Email Sending Daemon program directory using the following command:

```
rm -rf esd
```
- 3 To remove the Bounce Handler Daemon program, perform the following steps:

- a Navigate to the directory where the Bounce Handler Daemon program was installed and, if it is running, stop the Bounce Handler Daemon using the following command:

```
./bin/bhd-ctl.sh stop
```

- b Navigate to the parent directory where the Bounce Handler Daemon program was installed and remove the Bounce Handler Daemon program directory using the following command:

```
rm -rf bhd
```

- 4 To remove the Click-Through Daemon program, perform the following steps:

- a Navigate to the directory where the Click-Through Daemon program was installed and, if it is running, stop the Click-Through Daemon using the following command:

```
./tomcat-ctl.sh stop
```

- b Navigate to the parent directory where the Click-Through Daemon program was installed and remove the Click-Through Daemon program directory using the following command:

```
rm -rf ctd
```

Install the Java Software Development Kit (SDK)

Install the most recent maintenance release of the Java 1.4.2 SDK, not the JRE. The Java 2 SDK is a superset of the JRE (Java Runtime Environment) and contains everything that is in the JRE, plus tools such as the compilers and debuggers necessary for developing applets and applications.

Verifying the Object Manager Component is Enabled and Running

The object manager component (such as Marketing) to which you connect must be enabled and running on the Siebel Server. To verify this, use the following guidelines:

- Log in to Siebel Server.
- Navigate to Administration - Server Configuration > Servers > Components.
- Query for the alias name and make sure the component has a status of Online or Running.

For example, the Marketing component for the English language version has an alias name of SMObjMgr_enu.

Installing the Email Marketing Server

To install the email marketing server, you must first locate the Email Marketing Daemon installation programs. They are shipped on separate media from the Marketing operational application media. Installers for all platforms and Email Marketing daemons (Email Sending Daemon, Bounce Handler Daemon, and Click-Through Daemon) can be found on this media.

NOTE: When installing on a MS Windows platform, the components must be installed on a drive with sufficient space to handle the size of the log files.

To install Email Marketing, you must install each of the following components:

- **Email Sending Daemon (ESD).** The Email Sending Daemon installation program for Email Marketing 7.7 is called esd-install.exe on MS Windows and esd-install.bin on UNIX. The Email Sending Daemon is typically placed on a different server from the Marketing Server or any of the other Email Marketing components (for example, BHD and CTD).

Determine the appropriate location in which to install the Email Sending Daemon. Typically it is installed on the corporate network, behind the corporate DMZ. Selecting this location requires the network administrator to perform the following tasks:

- Define how the Email Sending Daemon connects to outbound Mail Transfer Agents within the DMZ.
 - Provide a way for the Email Sending Daemon to look up DNS A records for outbound Mail Transfer Agents.
- **Bounce Handler Daemon (BHD).** The Bounce Handler Daemon installation program for Email Marketing 7.7 is called bhd-install.exe on MS Windows and bhd-install.bin on UNIX. The Bounce Handler Daemon may be placed on a separate server from the Marketing Server or any of the other Email Marketing components (for example, ESD and CTD). However, it typically shares a server with the Click-Through Daemon.

Determine the appropriate location in which to install the Bounce Handler Daemon. Typically it is installed inside the corporate DMZ. Selecting this location requires the network administrator to perform the following tasks:

- Register the IP address that identifies the Bounce Handler Daemon on the Internet. The IP address must be registered as a DNS MX record. Historically, it takes at least two weeks (after registration) for the entire Internet to be properly updated with this information. Therefore, register as early as possible.
 - Define a way for the Bounce Handler Daemon to receive inbound SMTP messages from the Internet through the outer DMZ firewall. The Bounce Handler Daemon passes asynchronous bounce details to the Marketing Server through SISNAPI protocol. The communication between the Bounce Handler Daemon and the Marketing Server requires you to define a way for the SISNAPI messages to pass through the inner DMZ firewall.
- **Click-Through Daemon (CTD).** The Click-Through Daemon installation program for Email Marketing 7.7 is called ctd-install.exe on MS Windows and ctd-install.bin on UNIX. The Click-Through Daemon may be placed on a separate server from the Marketing Server or any of the other Email Marketing components (for example, ESD and BHD). However, it typically shares a server with the Bounce Handler Daemon.

Determine the appropriate location in which to install the Click-Through Daemon. Typically it is installed inside the corporate DMZ. Selecting this location requires the network administrator to perform the following tasks:

- Define a way for the Click-Through Daemon to service HTTP requests from the Internet through the outer DMZ firewall.
- Register the IP address that identifies the Click-Through Daemon on the Internet. The IP address must be registered as a DNS A record. Historically, it takes at least two weeks (after registration) for the entire Internet to be properly updated with this information. Therefore, register as early as possible.

- The Click-Through Daemon passes details about the HTTP requests it serviced (Tracked URLs, Forward To Friend, and so on) to the Marketing Server through SISNAPI protocol. The communication between the Click-Through Daemon and the Marketing Server requires you to define a way for the SISNAPI messages to pass through the inner DMZ firewall.
- **HTML Editor.** The HTML editor can be set up to automatically upload graphics to the Web server whenever a new graphic is added to an HTML document by the user.

This section contains the following topics:

- [Installing the Email Sending Daemon \(ESD\) on page 106](#)
- [Installing the Bounce Handler Daemon \(BHD\) on page 107](#)
- [Installing the Click-Through Daemon \(CTD\) on page 107](#)
- [Setting Up the HTML Editor for Automatic Uploads of Graphics on page 108](#)

Installing the Email Sending Daemon (ESD)

Complete the steps in the following procedure to install the Email Sending Daemon. Before installing the Email Sending Daemon, make sure that you have completed the installation requirements for email marketing. For more information, see [“Requirements for Installing Email Marketing” on page 101](#).

To install the Email Sending Daemon in Windows and UNIX

- 1 On a Windows 2000 server, run the Email Sending Daemon installation program.
- 2 On a UNIX server, perform the following steps:
 - a Make an installation directory named esd using the following command:

```
mkdi r esd
```
 - b Copy the Email Sending Daemon installation program from the installation media to the directory that you created.
 - c In the Email Sending Daemon installation directory, run the Email Sending Daemon installation program.
- 3 In the Installation dialog box, review the information, and then click Next.
- 4 In the Choose Java Virtual Machine dialog box, select the software development kit (SDK) that you installed in [“Requirements for Installing Email Marketing” on page 101](#), and then click Next.

NOTE: Make sure that you choose the correct SDK. Selecting the wrong SDK or selecting a JRE results in your being unable to properly start the Email Sending Daemon.
- 5 In the Choose Install Folder dialog box, choose the Email Sending Daemon installation directory, and then click Next.
- 6 Review the Pre-Installation Summary dialog box, and then click Install.
- 7 In the Install Complete dialog box, verify the information, and then click Done.

Installing the Bounce Handler Daemon (BHD)

This topic contains the information that you need to install the Bounce Handler Daemon. Before installing the Bounce Handler Daemon, make sure that you have completed the installation requirements. For more information, see [“Requirements for Installing Email Marketing” on page 101](#).

To install the Bounce Handler Daemon in Windows and UNIX

- 1 On a Windows 2000 server, run the Bounce Handler Daemon installation program.
- 2 On a UNIX server, perform the following steps:
 - a Make an installation directory named bhd using the following command:


```
mkdi r bhd
```
 - b Copy the Bounce Handler Daemon installation program from the installation media to the directory that you created.
 - c In the Bounce Handler Daemon installation directory, run the Bounce Handler Daemon installation program.
- 3 In the Installation dialog box, review the information, and then click Next.
- 4 In the Choose Java Virtual Machine dialog box, select the software development kit (SDK) that you installed in [“Requirements for Installing Email Marketing” on page 101](#), and then click Next.

NOTE: Make sure that you choose the correct SDK. Selecting the wrong SDK or selecting a JRE results in your being unable to properly start the Bounce Handler Daemon.
- 5 In the Choose Install Folder dialog box, choose the Bounce Handler Daemon installation directory, and then click Next.
- 6 Review the Pre-Installation Summary dialog box, and then click Install.
- 7 In the Install Complete dialog box, verify the information, and then click Done.

Installing the Click-Through Daemon (CTD)

This topic contains the information that you need to install the Click-Through Daemon. Before installing the Click-Through Daemon, make sure that you have completed the installation requirements. For more information, see [“Requirements for Installing Email Marketing” on page 101](#).

To install the Click-Through Daemon in Windows and UNIX

- 1 On a Windows 2000 server, run the Click-Through Daemon installation program.
- 2 On a UNIX server, perform the following steps:
 - a Make an installation directory named ctd using the following command:


```
mkdi r ctd
```
 - b Copy the Click-Through Daemon installation program from the installation media to the directory that you created.

Configuring Email Marketing Daemons

This topic contains the information that you need to configure Email Marketing Server and the Siebel Marketing application so that they can communicate with each other.

This section contains the following topics:

- [Configuring Email Marketing Daemons to Communicate With the Marketing Component Group on page 109](#)
- [Configuring the Email Sending Daemon on page 111](#)
- [Configuring the Bounce Handler Daemon on page 116](#)
- [Configuring the Click-Through Daemon on page 118](#)

Configuring Email Marketing Daemons to Communicate With the Marketing Component Group

This section contains the following topics that apply to all Email Marketing daemons:

- [Identifying the Object Manager Alias and Port for Email Marketing on page 109](#)
- [Setting Up the User Id, Password, and Language for Email Marketing on page 110](#)
- [Migrate the Siebel Server JAR files to the Email Sending Daemon on page 111](#)

CAUTION: During this process, do not start the Email Marketing daemons until told to do so. If you do accidentally start any of the daemons, stop them immediately before proceeding.

Identifying the Object Manager Alias and Port for Email Marketing

You need the object manager alias and port values to perform several tasks in this chapter. Keep a record of these values to make the tasks easier to complete.

To identify the object manager alias and object manager port

- 1 Determine the object manager alias name for the object manager to connect to. Write this down to use later.

For example, SMObjMgr_enu (Marketing Component Group)

- 2 Navigate to the SWE installation directory.
- 3 Locate the SWE eapps.cfg file in the following directory:
`<marketing server install directory>\SWEApp\BIN\`
- 4 Open eapps.cfg in a text editor.
- 5 Search for the object manager alias name to connect to. The line begins with ConnectString.

- 6 In the ConnectString line, locate the object manager port (a four-digit number preceded by a colon) and write down the number to use later.

For example, :2192

Setting Up the User Id, Password, and Language for Email Marketing

Each of the Email Marketing daemons has information that it needs to pass to the Marketing Server. For example, the Email Sending Daemon uses the SISNAPI protocol to communicate information about subwaves that have been completed and details about synchronous bounces. This communication is established by following the steps in this topic.

You can use a hashed (encrypted) password in the siebel.properties file. To create a hashed password, use the hashpwd.exe application. For more information, see the “Running the Password Hashing Utility” in the *Siebel Security Guide*. To enable the use of hashed passwords, you must add the line `si ebel . user . encrypted= true` to the siebel.properties file. If this property is not included in the file, the default value of `si ebel . user . encrypted= false` is used.

To set up a siebel.properties file

- 1 Locate the siebel.properties file in each of the following directories:
 - `<esd installation directory>\webapps\esd\WEB-INF\classes\`
 - `<bhd installation directory>\lib\`
 - `<ctd installation directory>\webapps\ctd\WEB-INF\classes`
- 2 Open each siebel.properties file with a text editor such as WordPad (Windows) or vi (UNIX).
- 3 Locate the string `si ebel . conection . string`.
- 4 To the right of the equals sign, add the object manager alias name using the following syntax:


```
<enterprise drive name>://<marketing server hostname>:<object manager port>/<
enterprise name>/<object manager alias name>
```

NOTE: For MS Windows, the enterprise name and siebel server name appear in square brackets after the Siebel Server service in the Services window.
- 5 Locate the string `si ebel . user . name`.
- 6 At the right of the equals sign, add the Administrator user name.
- 7 If you are using a hashed password, add the following line above the string `si ebel . user . password`.


```
si ebel . user . encrypted= true
```
- 8 Locate the string `si ebel . user . password`. At the right of the equals sign, add the Administrator password. If you set `si ebel . user . encrypted= true`, then enter a hashed password, otherwise enter a plaintext password.
- 9 Locate the string `si ebel . user . language`. At the right of the equals sign, add the language abbreviation.

For example, `enu` (English).
- 10 Save your changes to each siebel.properties file.

Migrate the Siebel Server JAR files to the Email Sending Daemon

Migrate the Siebel Java bean (Siebel.jar) and Java Internationalization (SiebelJI_enu.jar) JAR files to the Email Sending Daemon.

- Locate the Siebel Server Java JAR files in the following directory:
 - *<siebel server install directory>*\siebsrvr\CLASSES directory
- Copy the Siebel.jar file from this directory to the following directories:
 - *<esd installation directory>*\webapps\esd\WEB-INF\lib directory
 - *<bhd installation directory>*\lib directory
 - *<ctd installation directory>*\webapps\ctd\WEB-INF\lib directory
- Copy the SiebelJI_<language>.jar file from this directory to the following directories:
 - *<esd installation directory>*\webapps\esd\WEB-INF\lib directory
 - *<bhd installation directory>*\lib directory
 - *<ctd installation directory>*\webapps\ctd\WEB-INF\lib directory

Configuring the Email Sending Daemon

This topic contains the configuration tasks you need to perform so that the Marketing application can communicate with the Email Sending Daemon. Additionally, you must configure the Email Sending Daemon to read files from the Marketing File System and communicate with the outbound Mail Transfer Agents. During these tasks, you have an opportunity to verify that the Email Sending Daemon has been correctly installed and configured. For information about this test, see [“Final Test of Email Marketing Components” on page 121](#).

CAUTION: During this process, do not start the Email Sending Daemon until told to do so. If you do accidentally start it, stop it immediately before proceeding.

To configure the Email Sending Daemon to connect to the Marketing Server, perform the following steps:

- [Identifying the Outbound Mail Transfer Agents for the Email Sending Daemon on page 112](#)
- [Configuring the Email Sending Daemon to Access the Marketing File System on page 112](#)
- [Configuring the SOAP Communications Port on page 113](#)
- [Verifying the Email Sending Daemon Installation on page 114](#)
- [Configuring the Marketing Application to Connect to the Email Sending Daemon on page 115](#)
- [Configuring the Email Address Headers for the Email Marketing Server on page 115](#)

Identifying the Outbound Mail Transfer Agents for the Email Sending Daemon

The Email Sending Daemon (ESD) needs one or more outbound Mail Transfer Agents (MTAs) to deliver the email over the Internet. If you specify multiple MTAs, then the ESD uses the additional MTAs as backups. In the `siebel.properties` file, you specify the names of your MTAs. When the ESD starts, it uses the first MTA on the list. When an MTA fails, the ESD uses the next MTA on the list. To use the first MTA again, you must restart the ESD, usually by rebooting the server.

To identify the outbound Mail Transfer Agent for ESD

- 1 Determine the hostname of the outbound Mail Transfer Agent.
- 2 Open the `siebel.properties` file in a text editor such as WordPad (Windows) or `vi` (UNIX).
- 3 Locate the string `esd.mailServers`.
- 4 In the string, at the right of the equals sign, add the hostname of the outbound Mail Transfer Agent. If there is more than one, separate them with commas.
- 5 Save your changes.

Configuring the Email Sending Daemon to Access the Marketing File System

The Email Sending Daemon needs to access the Siebel Marketing File System to load the email message content (generated from the email offer(s) and attachments) and the subwaves of contacts and prospects generated for a campaign wave.

To identify the Marketing File System on Windows 2000 Server

- 1 Log in to Siebel Server.
- 2 Navigate to Administration - Server Configuration > Servers > Parameters.
- 3 Query for Marketing File System.
Write down the value of this parameter to use later in this task.
- 4 Identify the Windows share name for this directory.
Write down this name to use later in this task.
- 5 Open the `siebel.properties` file with a text editor such as WordPad.
- 6 In the string `esd.mountPoint`, at the right of the equals sign, enter the following path using the share name determined in [Step 4 on page 112](#):

```
\\<siebel server hostname>\\<marketing file system share name>
```

Use two backslashes for each standard single backslash when defining this path. For example, `C:\Windows` would be `C:\\Windows`.

CAUTION: If the Marketing File System is on the same server as the Email Sending Daemon, use the complete path to the Marketing File System instead of the share name. This avoids potential permission issues.

- 7 Save your changes to the siebel.properties file.

To identify the Marketing File System location on a UNIX server

- 1 Log in to Siebel Server.
- 2 Navigate to Administration - Server Configuration > Servers > Parameters.
- 3 Query for Marketing File System.
Write down the value of this parameter to use later in this task.
- 4 Determine if this directory is exported through NFS. If it is not, export it.
- 5 Open the siebel.properties file with a text editor, such as vi.
- 6 On the Email Sending Daemon server, make sure the Marketing File System is NFS mounted. If it is not, mount it at this time.
Write down the full path name of the mounted Marketing File System to use later in this task.
- 7 In the string esd.mountPoint, at the right of the string, add the Marketing File System NFS mount directory.
- 8 Save your changes to the siebel.properties file.

Configuring the SOAP Communications Port

The Marketing application on the Siebel Server communicates with the Email Sending Daemon using the SOAP protocol, which uses HTTP requests. You must configure the Email Sending Daemon to listen for these HTTP requests on a specific port.

To configure the SOAP communications port

- 1 Consider what port number you desire to use to service the SOAP commands (HTTP requests) on the Email Sending Daemon.
Because this HTTP server does not service standard HTTP requests such as Web pages, any port can be used (even the default of 8080). Write down the port number you decide to use.
- 2 At the following location, open the server.xml file in a text editor, such as WordPad (Windows) or vi (UNIX):

```
<esd installation directory>\confi g\server.xml
```
- 3 Locate the XML tag Connector by searching for following phrase:
Define a non-SSL Coyote HTTP/1.1 Connector
- 4 Identify the value of the port attribute and, if necessary, change it to the value you chose in [Step 1 on page 113](#).
By default this value is 8080.
- 5 Save the change.
You need this port number again in a subsequent task.

Verifying the Email Sending Daemon Installation

At this point, you can test the installation of the Email Sending Daemon. To verify that the installation was successful, you start the Email Sending Daemon and then perform several verification steps. For information about testing how the Email Marketing components and the Marketing application work together, see [“Final Test of Email Marketing Components” on page 121](#).

To start the Email Sending Daemon on Windows 2000 Server

- 1 From the desktop, click Start and choose Settings > Control Panel.
- 2 In Control Panel, choose Administrative Tools > Services.
- 3 Right-click the Email Sending Daemon service and select Start.

To start the Email Sending Daemon on a UNIX server

- 1 Open a window and navigate to the Email Sending Daemon install directory.
- 2 Enter and run the following command:

```
./tomcat-ctl.sh start &
```

- 3 Optionally, you can enter and run the following commands:

```
./tomcat-ctl.sh start &; tail -f logs/esd.log
```

NOTE: The first command (`./tomcat-ctl.sh start &`) launches the daemon. The second command (`tail -f logs/esd.log`) displays output to the esd log as it is running without generating a read lock on the file. A read lock would prevent these commands from working.

To verify the Email Sending Daemon installation

- 1 Verify that the Email Sending Daemon Windows Service or UNIX process runs and stays running without an error message.
- 2 Open the `esd_InstallLog.log` file (found in the *<esd installation directory>*) and read the summary at the start of the file. Make sure it says that the installation was successful with no warnings or errors. If there are warnings or errors, you must identify the cause and fix the error.

- 3 Verify that a `esd.log` file exists in the following directory:

```
<esd installation directory>\logs\esd.log
```

- 4 Verify that the following text is in the `esd.log` file:

```
INFO ConnectTest Successfully connected to Siebel Server!
```

```
INFO ConnectTest Logged out of Siebel.
```

- 5 Make sure there are no ERROR or WARN level messages in the `esd.log` file.
- 6 Confirm that the Email Sending Daemon Web container is running.

NOTE: You need the port number that you obtained in [“Configuring the SOAP Communications Port” on page 113](#).

- Verify that you can open the following Web page without error using Internet Explorer:
`http://<email sending daemon server hostname>:<email sending daemon soap port>/esd/soaprpc`

Configuring the Marketing Application to Connect to the Email Sending Daemon

This section describes how to set up the Marketing application to connect to the Email Sending Daemon.

- 1 Open Internet Explorer and navigate to the Siebel Marketing Server login screen.
For example, `http://<marketing server hostname>/marketing_enu`
- 2 Log in as the server administrator.
- 3 Navigate to Administration - Web Services screen > Outbound Web Services.
- 4 In the Outbound Web Services list, in the Name field, query for SendMailingService.
- 5 In the Service Ports list, in the SendMailing record, perform the following steps:
 - a Obtain the Web Port Id identified in [“Configuring the SOAP Communications Port”](#) on page 113.
 - b In Address field, change the URL using the following syntax:
`http://<esd server hostname>:<esd web port>/esd/soaprpc`
- 6 Click Clear Cache.
- 7 Navigate to Administration - Marketing screen > Servers.
- 8 In the Servers list, in the Name field, query for Email Marketing Server.
- 9 In the parameters list, locate the Email Sending Daemon (ESD) parameter, and verify that the Outbound Web Service Port field contains SendMailing.

Configuring the Email Address Headers for the Email Marketing Server

This section describes how to configure the From and Reply-To headers for outbound email sent using the Email Sending Daemon.

To configure the From Address and Reply-To Address for the Email Marketing Server

- 1 Navigate to Administration - Marketing screen > Servers.
- 2 In the Servers list, in the Name field, query for Email Marketing Server.

- 3 In the parameters list, in the Value field, update the values as shown in the following table:

Parameter Type	Value
From Address (From header)	<email address> An address to use as the From header for outgoing emails.
Reply To Address (Reply-To header)	<email address> An address to use as the Reply-To header for outgoing emails.

Configuring the Bounce Handler Daemon

The Bounce Handler Daemon notifies the Marketing Component Group that it has processed asynchronous bounces and needs to pass these bounce details to the Marketing Component Group. This topic contains the information that you need to configure the Bounce Handler Daemon to communicate with the Marketing Component Group.

To configure the Bounce Handler Daemon, perform the following tasks:

- [Verifying the Bounce Handler Daemon Installation on page 116](#)
- [Configure the From Address of the SMTP Envelope on page 117](#)
- [Configure the Click-Through Daemon HTTP Server Port on page 118](#)

CAUTION: During this process, do not start the Bounce Handler Daemon until told to do so. If you do accidentally start it, stop it immediately before proceeding.

Verifying the Bounce Handler Daemon Installation

To verify the installation was successful, you start the Bounce Handler Daemon and then perform installation tests. For information about testing how the Email Marketing components and the Marketing Component Group work together, see [“Final Test of Email Marketing Components” on page 121](#).

To start the Bounce Handler Daemon on Windows 2000 Server

- 1 From the desktop, click Start and choose Settings > Control Panel.
- 2 In Control Panel, choose Administrative Tools > Services.
- 3 Right-click the bhd service and select Start.

To start the Bounce Handler Daemon on a UNIX server

- 1 Open a window and navigate to the Bounce Handler Daemon install directory.
- 2 Enter and run the following command:

```
./bin/bhd-ctl.sh start &
```

- 3 Optionally, you can enter and run the following commands:

```
./bin/bhd-ctl.sh start & tail -f bhd.log
```

NOTE: The first command (`./bin/bhd-ctl.sh start &`) launches the daemon. The second command (`tail -f bhd.log`) displays output to the bhd log as it is running without generating a read lock on the file. A read lock would prevent these commands from working.

To verify the Bounce Handler Daemon installation

- 1 Verify that the Bounce Handler Daemon Windows Service or UNIX process is running and stays running without an error message.
- 2 Open the `bhd_InstallLog.log` file (found in the *<bhd installation directory>*) and read the Summary at the start of the file. Make sure it says that the installation was successful with no warnings or errors. If there are warnings or errors, you must identify the cause and fix the error.
- 3 Verify that a `bhd.log` file exists in the following directory:
<bhd installation directory>\logs\bhd.log
- 4 Verify that the following text is in the `bhd.log` file:
INFO ConnectTest Successfully connected to Siebel Server!
INFO ConnectTest Logged out of Siebel.
- 5 Make sure there are no ERROR or WARN level messages in the `bhd.log` file.
- 6 From a command prompt window, telnet to the Bounce Handler Daemon SMTP port (25) (for example, `telnet bhd.siebel.com 25`), wait for a greeting, and then enter the word quit and press ENTER. Your telnet session then ends.

Configure the From Address of the SMTP Envelope

This section describes how to configure the hostname that you use to create the from address of the SMTP envelope. This from address is the email address that receives bounced emails. The hostname you use as the from address is the host name of the Bounce Handler Daemon.

To configure the SMTP envelope from address

- 1 Navigate to the Siebel Marketing login screen at the following location:
`http://<marketing application hostname>/marketing_enu`
- 2 Log in as the server administrator.
- 3 Navigate to Administration - Marketing screen > Servers.
- 4 In the Servers list, in the Name field, query for Email Marketing Server.

- 5 In the parameters list, in the Value field, update the values as shown in the following table:

Parameter Type	Value
Bounce Handler Daemon (BHD)	< <i>bhd server hostname</i> >

Configuring the Click-Through Daemon

This topic contains the information that you need to configure the Click-Through Daemon to communicate with the Marketing Component Group. The Click-Through Daemon needs to pass the server details about the HTTP requests it has serviced (Tracked URLs, Forward To Friend, and so on) to the Marketing Component Group.

To configure the Click-Through Daemon to connect to the Marketing Component Group, perform the following tasks:

- [Configure the Click-Through Daemon HTTP Server Port on page 118](#)
- [Verifying the Click-Through Daemon Installation on page 119](#)
- [Configuring the Click-Through Daemon, Web Marketing, and Events Base URLs on page 120](#)

CAUTION: During this process, do not start the Click-Through Daemon until told to do so. If you do accidentally start it, stop it immediately before proceeding.

The script used to start both ESD and CTD uses the same ports for both applications. For them to run together on the same server, the startup and shutdown ports must be unique. To change the ports, edit either the esd or ctd install>/conf/server.xml files.

ESD Example:

```
<Server port = "8006" shutdown="SHUTDOWN" debug ="0"> (port changed 8005 to port 8006)
```

```
<Connector className="org.apache.coyote.tomcat4.CoyoteConnector" port ="8081"... > (port changed 8080 to port 8081)
```

CTD Example:

```
<Server port = "8005" shutdown="SHUTDOWN" debug ="0"> (This is the default, and was not changed)
```

```
<Connector className="org.apache.coyote.tomcat4.CoyoteConnector" port ="8181"... > (port changed 8080 to port 8181)
```

Configure the Click-Through Daemon HTTP Server Port

Personalization elements sent in emails to contacts and prospects that the Click-Through Daemon services (for example, Track Message Open, Tracked URLs, and so on) must be able to issue HTTP requests to the Click-Through Daemon. You must configure your firewalls/DMZ to service these requests and the Email Sending Daemon to listen for these HTTP requests on a specific port.

- Identify the port number to use to service HTTP requests on the Click-Through Daemon and write it down for use in subsequent tasks.

NOTE: A best practice is to use port 80, which is the standard port for HTTP requests. Typically, this port is open for most firewalls between the corporate network and the Internet. Therefore, using this port minimizes connection issues between the Click-Through Daemon and your contacts and prospects.

- Configure your firewall to properly service these requests over this port.
- Open the following file with a text editor, such as WordPad (Windows) or vi (UNIX):

```
<ctd installation directory>\conf\server.xml
```

- Search for the following phrase:

Define a non-SSL Coyote HTTP/1.1 Connector

- Search for the XML tag Connector using the following phrase:

Find the value of the port attribute

By default this value is 8080. If you chose a different port number to service HTTP requests on the Click-Through Daemon, change the port attribute value and save the file.

Verifying the Click-Through Daemon Installation

To verify the installation was successful, you start the Click-Through Daemon and then perform the installation test. For information about testing how the Email Marketing components and the Marketing Component Group work together, see [“Final Test of Email Marketing Components” on page 121](#).

To start the Click-Through Daemon on Windows 2000 Server

- 1 From the desktop, click Start and choose Settings > Control Panel.
- 2 In Control Panel, choose Administrative Tools > Services.
- 3 Right-click the ctd service and select Start.

To start the Click-Through Daemon on a UNIX server

- 1 Open a window and navigate to the Click-Through Daemon install directory.
- 2 Enter and run the following command:

```
./tomcat-ctl.sh start &
```

- 3 Optionally, you can enter and run the following commands:

```
./tomcat-ctl.sh start & tail -f logs/ctd.log
```

NOTE: The first command (`./tomcat-ctl.sh start &`) launches the daemon. The second command (`tail -f logs/ctd.log`) displays output to the ctd log as it is running without generating a read lock on the file. A read lock would prevent the tail command from working.

To verify the Click-Through Daemon installation

- 1 Verify that the Click-Through Daemon MS Windows service or UNIX process runs and stays running without an error message.
- 2 Open the ctd_InstallLog.log file (found in the *<ctd installation directory>*) and read the Summary at the start of the file. Make sure it says that the installation was successful with no warnings or errors. If there are warnings or errors, you must identify the cause and fix the error.
- 3 Verify that a ctd.log file exists in the following directory:
<ctd installation directory>\logs\ctd.log
- 4 Verify that the following text is in the ctd.log file:
INFO ConnectTest Successfully connected to Siebel Server!
INFO ConnectTest Logged out of Siebel.
- 5 Make sure there are no ERROR or WARN level messages in the ctd.log file.
- 6 Confirm that the Click-Through Daemon Web container is running.

NOTE: To do this, you need the port number that you obtained in “Configure the Click-Through Daemon HTTP Server Port” on page 118.

- Verify that you can open the following Web page without an error using Internet Explorer:

`http://<click-through daemon server hostname>:<click-through daemon http port>/ctd/enu/ftfThankyou.jsp`

Configuring the Click-Through Daemon, Web Marketing, and Events Base URLs

This section describes how to configure the base URLs for URLs sent in email campaigns. The following are the sets of base URLs that may be generated:

- Click-Through Daemon base URL (used for Tracked URLs, Forward To Friend, and so on)
- Web Marketing base URL
- Events base URL

To configure base URLs for email campaigns

- 1 Navigate to the Siebel Marketing Server login screen at the following location:
`http://<marketing application hostname>/marketing_enu`
- 2 Log in as the server administrator.
- 3 Navigate to Administration - Marketing screen > Servers.
- 4 In the Servers list, in the Name field, query for Email Marketing Server.

- 5 In the parameters list, in the Value field, update the values as shown in the following table:

Parameter Type	Value
Click-Through Daemon (CTD)	<code>http://<click-through daemon server hostname>:<port number></code>
Web Server	<code><URL for Web Marketing>; <URL for Events></code> For example, <code>http://<hostname>/emarketing_enu</code> ; <code>http://<hostname>/eevents_enu</code>

Final Test of Email Marketing Components

At this point, you have installed and configured all of the Email Marketing components (Email Sending Daemon, Bounce Handler Daemon, and Click-Through Daemon) and tested each separate component.

This section describes how to test all components and the Marketing application together as a complete product. This test involves sending a test email to three or more test contacts. The content of the test email template must include links to test the Click-Through Daemon, the Web Marketing Server, and the Events server. Make sure at least two of the contacts are invalid email addresses, one within the corporate domain, and one outside the corporate domain. These test bounce handling and bounce detail communications for the Email Sending Daemon and the Bounce Handler Daemon. Additionally, send email to at least one email account that you can access outside of your corporate network. This tests your Email Sending Daemon, DNS alterations, and corporate firewall configurations.

To perform this comprehensive test of the Email Marketing components, perform the following tasks:

- [Create the Test Email Template on page 121](#)
- [Send the Test Email Template to Test Contacts on page 122](#)
- [Confirm that Tests Function as Expected on page 122](#)

Create the Test Email Template

You create a test email template to verify your Email Marketing components are correctly installed and configured. For information about creating an email template, see *Siebel Marketing User Guide*.

When you create the test email template, make sure you add a One-Click Unsub Response Form, a Web Offer link, and an Event link.

NOTE: Because this email is sent out over the Internet, a best practice is to add text that announces that this is a test email, offers your apologies if someone unintended receives it, and provides information so the recipients can contact you.

Send the Test Email Template to Test Contacts

Determine the contacts to whom the test email template is sent, create an email offer from it, and send it to these contacts.

- 1 Whether you use a list or a segment to generate your target contacts for this test, make sure the following three contact types are included:
 - **Invalid contact email address within the corporate domain.** This tests communication from the Email Sending Daemon to the Marketing Component Group. The Email Sending Daemon reports synchronous bounces to the Marketing Component Group. An invalid email address within the corporate domain generates a synchronous bounce from the Mail Transfer Agent.

NOTE: The administrator must make sure that the Mail Transfer Agent is configured to handle synchronous bounces and confirm that the contact's email address generates a synchronous bounce. This is desirable even if the Mail Transfer Agent is normally not configured to handle synchronous bounces. The reason for this is to make sure that if the normal Mail Transfer Agent configuration changes and starts performing synchronous bounces, your server can properly record them. After testing, the administrator can return the Mail Transfer Agent to its normal configuration.
 - **Invalid contact email address outside of the corporate domain.** This tests the corporate firewall and Internet DNS configuration of the Bounce Handler Daemon. This also tests communication between the Bounce Handler Daemon and the Marketing Component Group. An invalid email address for a domain other than the corporate domain generates an asynchronous bounce. The Bounce Handler Daemon must be able to receive bounced emails, process bounced emails, and send the bounce details to the Marketing Component Group.

Be aware that some email domains (such as aol.com) do not generate bounces. Also, be aware that email bounces are not guaranteed to be returned. It may take some research to determine whether the problem is actually the Bounce Handler Daemon or one of a number of issues not related to the installation and configuration of the Email Marketing components.
 - **Valid contact email address for an email account accessible outside of the corporate firewall.** This tests the corporate firewall and Internet DNS configuration with the Click-Through Daemon, Web Server, and Event Server. This tests communication between the Click-Through Daemon and the Marketing Server. The email sent to a valid contact contains a One-Click Unsub Response Form, a Web Offer link, and an Event link. The tester must access this account and email from a computer outside the corporate firewall to correctly execute this test.
- 2 Launch a campaign using a list or segment including the described types of contacts.
- 3 Monitor the campaign to make sure that it succeeds without any errors. One example of an error is an error message in the log containing the word SOAP. This indicates that the Marketing application is not correctly configured to communicate with the Email Sending Daemon.

Confirm that Tests Function as Expected

Perform the tests in this section to confirm that the application behaved as expected.

- 1 Test an email offer sent to the valid contact email address

- a Verify that the email offer was received. Find a computer that is outside of the corporate network and has access to the valid contact's email account. Then you must access that account from the computer that is outside of the corporate network.

Results of test. If the email offer is received, you have confirmed the following results:

- The Marketing Server communicates with the Email Sending Daemon.
- The Email Sending Daemon can access the email message content and subwaves from the Marketing File System.
- The Email Sending Daemon can send email to email accounts outside of the corporate domain using the corporate Mail Transfer Agents.
- The email message From and Reply-To headers are correct.

- b Click the One Click Unsub link in the email.

A Web page that is hosted by the Click-Through Daemon appears with the message, You have been unsubscribed!

Results of test. This message confirms that you correctly configured the Click-Through Daemon for the corporate firewall and it has been properly added to the Internet DNS records. Additionally, this confirms that the Marketing application has been correctly configured with the base URL for the Click-Through Daemon.

- c Click the One Click Unsub link in the email for the Web Offer link and the Event link.

Results of test. The Web Server and Event Server base URLs are properly configured within the Marketing application.

2 Campaign details

- a Synchronous bounce reported. Navigate to the Campaign Contact/Prospect Applet-Admin applet for the test campaign. Verify that the invalid contact with an email address within the corporate domain is identified as a bounce.

Results of test. The Email Sending Daemon is able to communicate with the Marketing application and can report synchronous bounces.

NOTE: You may have to add the Email Bounce Type and Email Bounce Reason Code columns to the visible columns shown in this applet.

- b Asynchronous bounce reported. Navigate to the Campaign Contact/Prospect Applet-Admin applet for the test campaign. Verify that the invalid contact with an email address outside of the corporate domain is identified as a bounce.

Results of test. The Bounce Handler Daemon can receive bounces sent from outside of the company firewall. This means the Bounce Handler Daemon's hostname is correctly configured in the Internet DNS records. The Bounce Handler Daemon is able to communicate with the Marketing Component Group and can report asynchronous bounces. The Marketing application has been correctly configured to use the Bounce Handler's hostname as the SMTP envelope from address.

- c One Click Unsub recorded. Navigate to the Campaign Response List applet and verify that the valid contact's email address is entered here with a Response Type of One Click Unsub.

Results of test. The Click-Through Daemon can communicate with the Marketing Component Group and update the Siebel transactional database with information that it collects when an email recipient clicks on a link that it monitors.

SOAP Calls for Marketing

There are SOAP calls available for Marketing. Most SOAP calls are documented in the *Siebel Analytics Web Services Guide*. There are some Marketing-specific SOAP calls as follows:

- ["deleteResultSet Method" on page 124](#)
- ["getCounts Method" on page 126](#)
- ["prepareCache Method" on page 128](#)
- ["purgeCache Method" on page 129](#)
- ["saveResultSet Method" on page 130](#)
- ["writeListFiles Method" on page 132](#)

deleteResultSet Method

API Definition

Method

```
<binding name="JobManagementService" type="i0:JobManagementServiceSoap">
  <soap:binding transport="http://schemas.xmlsoap.org/soap/http" style="document" />
  <operation name="deleteResultSet">
    <soap:operation soapAction="#deleteResultSet" style="document" />
    <input>
      <soap:body use="literal" />
    </input>
    <output>
      <soap:body use="literal" />
    </output>
  </operation>
</binding>
```

Method Input

```
<xsd:element name="deleteResultSet">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="targetLevel" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>
```

```

        <xsd:element name="GUIDs" type="sawsoap:arrayOfGUIDs" minOccurs="0"
maxOccurs="1" />
        <xsd:element name="segmentPath" type="xsd:string" minOccurs="1"
maxOccurs="1" />
        <xsd:element name="deleteOption" minOccurs="0" maxOccurs="1" default="all"
/>
        <xs:simpleType>
            <xs:restriction base="xsd:string">
                <xs:enumeration value="mostRecent" />
                <xs:enumeration value="oldest" />
                <xs:enumeration value="all" />
            </xs:restriction>
        </xs:simpleType>
        <xsd:element name="sessionId" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
</xsd:complexType>
</xsd:element>

<xsd:complexType name="arrayOfGUIDs">
    <xsd:sequence>
        <xsd:element name="GUID" type="xsd:string" minOccurs="0"
maxOccurs="unbounded" />
    </xsd:sequence>
</xsd:complexType>

```

Method Output

```

<xsd:element name="deleteResultSetResult">
    <xsd:complexType>
        <xsd:sequence>
            <xsd:element name="jobInfo" type="sawsoap:JobInfo" />
        </xsd:sequence>
    </xsd:complexType>
</xsd:element>

```

Valid Usage Scenarios

Deletes one or more saved result sets of target level objects identified by a list of GUID values belonging to a segment.

```

<deleteResultSet>
    <targetLevel>[target level the saved result set contains]</targetLevel>
    <GUIDS>
        <GUID>[GUID value for saved result set 0]</GUID>
        <GUID>[GUID value for saved result set 1]</GUID>
        ...
        <GUID>[GUID value for saved result set N]</GUID>
    </GUIDS>
    <segmentPath>[path to the segment]</segmentPath>
</deleteResultSet>

```

Usage Options

None.

getCounts Method

The getCounts method generates the count numbers for either a segment or a segment tree. Thus, the segmentPath element must be specified in the getCounts element when getCounts is performed on a segment. Otherwise, the treePath element must be specified in the getCounts element when getCounts is performed on a segment tree. Anything else results in an error.

API Definition

```
<xsd:element name="getCounts">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="segmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="treePath" type="xsd:string" minOccurs="0" maxOccurs="1"
/>
      <xsd:element name="segmentationOptions"
type="sawsoap:SegmentationOptions" minOccurs="0" maxOccurs="1" />
      <xsd:element name="sessionId" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>

<xsd:complexType name="SegmentationOptions">
  <xsd:sequence>
    <xsd:element name="removeCacheHits" type="xsd:boolean" default="false"
minOccurs="0" maxOccurs="1" />
    <xsd:element name="countOverride" type="sawsoap:OverrideType"
default="Default" minOccurs="0" maxOccurs="1" />
    <xsd:element name="cacheOverride" type="sawsoap:OverrideType"
default="Default" minOccurs="0" maxOccurs="1" />
    <xsd:element name="samplingFactor" type="xsd:decimal" default="100"
minOccurs="0" maxOccurs="1" />
  </xsd:sequence>
</xsd:complexType>
```

Valid Usage Scenarios

Calculates the count numbers for the segment.

```
<getCounts>
  <segmentPath>[path to the segment]</segmentPath>
  <segmentationOptions>
    <countOverride>All</countOverride>
  </segmentationOptions>
</getCounts>
```

Calculates the count numbers for the segment tree.

```
<getCounts>
  <treePath>[path to the segment tree]</treePath>
  <segmentationOptions>
    <countOverride>All</countOverride>
  </segmentationOptions>
</getCounts>
```

Usage Options

Segmentation options are used by `getCounts` to override the default options specified for the segment or segment tree in Marketing Analytics. The usage options for the `GetCounts` operation are `count override`, `remove cache hits`, and `sampling factor`. These options are specified within the `segmentationOptions` element.

`countOverride`

- All
- Default (default value)
- None

The `countOverride` value must be set to "All" to execute `getCounts` SOAP method. "All" specifies that count numbers are calculated for all criteria blocks. Otherwise executing `getCounts` results in an error.

`removeCacheHits`

- false (default value)
- true

Usually cache entries are refreshed with the latest information when cache entries are expired or does not exist. But set `removeCacheHits` to true for `getCounts` to ensure that you query against the most current data. This is achieved by removing all existing cache entries that contain count information for the target segment or segment tree and repopulating the cache with new count number entries calculated by `getCounts`.

`samplingFactor`

- 100 (default value)
- 0 to 100

The `getCounts` calculates the count number of criteria blocks against a subset of the data determined by the `samplingFactor` value. The default value of 100 determines that the count number is calculated against the entire data set. Set the `samplingFactor` to indicate the size of the data set for calculating counts.

prepareCache Method

The prepareCache method caches a segment or a segment tree for list export.

API Definition

```
<xsd:element name="prepareCache">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="segmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="treePath" type="xsd:string" minOccurs="0" maxOccurs="1"
/>
      <xsd:element name="refresh" type="xsd:boolean" default="false"
minOccurs="0" maxOccurs="1" />
      <xsd:element name="sessionId" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>

<xsd:complexType name="treeNodePath">
  <xsd:sequence>
    <xsd:element name="treePath" type="xsd:string" minOccurs="1" maxOccurs="1" />
    <xsd:element name="treeNodePriority" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    <xsd:element name="treeNode" type="xsd:string" minOccurs="0" maxOccurs="1" />
  </xsd:sequence>
</xsd:complexType>
```

Valid Usage Scenarios

Caches the segment for list export.

```
<prepareCache>
  <segmentPath>[path to the segment]</segmentPath>
</prepareCache>
```

Caches the segment tree for list export.

```
<prepareCache>
  <treePath>[path to the segment tree]</treePath>
</prepareCache>
```

Usage Options

None.

purgeCache Method

The purgeCache method purges the entire cache, purges entries for a segment from the cache, or purges entries for a segment tree from the cache.). If the node specified is a non-leaf node then the cache for all its children leaf nodes is purged.

API Definition

Method

```
<binding name="JobManagementService" type="i0:JobManagementServiceSoap">
  <soap:binding transport="http://schemas.xmlsoap.org/soap/http" style="document" />
  <operation name="getCounts">
    <soap:operation soapAction="#purgeCache" style="document" />
    <input>
      <soap:body use="literal" />
    </input>
    <output>
      <soap:body use="literal" />
    </output>
  </operation>
</binding>
```

Method Input

```
<xsd:element name="purgeCache">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="segmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="treePath" type="sawsoap:treeNodePath" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="ignoreCacheRef" type="xsd:boolean" default="false"
minOccurs="0" maxOccurs="1" />
      <xsd:element name="sessionId" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>

<xsd:complexType name="treeNodePath">
  <xsd:sequence>
    <xsd:element name="treePath" type="xsd:string" minOccurs="1" maxOccurs="1" />
    <xsd:element name="treeNodePriority" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    <xsd:element name="treeNode" type="xsd:string" minOccurs="0" maxOccurs="1" />
  </xsd:sequence>
</xsd:complexType>
```

Method Output

```
<xsd:element name="purgeCacheResult">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="jobInfo" type="sawsoap:JobInfo" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>
```

Valid Usage Scenarios

All cache content is purged from cache.

```
<purgeCache>
</purgeCache>
```

Purges entries for the segment from cache.

```
<purgeCache>
  <segmentPath>[path to the segment]</segmentPath>
</purgeCache>
```

Purges entries for the segment tree from the cache.

```
<purgeCache>
  <treePath>[path to the segment tree]</treePath>
</purgeCache>
```

Usage Options

None.

saveResultSet Method

API Definition

```
<xsd:element name="saveResultSet">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="segmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="treeNodePath" type="sawsoap:TreeNodePath" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="savedSegmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="segmentationOptions"
type="sawsoap:SegmentationOptions" minOccurs="0" maxOccurs="1" />
      <xsd:element name="SRCustomLabel" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="appendStaticSegment" type="xsd:boolean" default="false"
minOccurs="0" maxOccurs="1" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>
```

```

        <xsd:element name="sessionId" type="xsd:string" minOccurs="0"
maxOccurs="1" />
    </xsd:sequence>
</xsd:complexType>
</xsd:element>

<xsd:complexType name="TreeNodePath">
    <xsd:sequence>
        <xsd:element name="treePath" type="xsd:string" minOccurs="1" maxOccurs="1" />
        <xsd:element name="treeNode" type="xsd:string" minOccurs="0" maxOccurs="1" />
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="SegmentationOptions">
    <xsd:sequence>
        <xsd:element name="removeCacheHits" type="xsd:boolean" default="false"
minOccurs="0" maxOccurs="1" />
        <xsd:element name="countOverride" type="xsd:string" default="Default"
minOccurs="0" maxOccurs="1" />
        <xsd:element name="cacheOverride" type="xsd:string" default="Default"
minOccurs="0" maxOccurs="1" />
        <xsd:element name="samplingFactor" type="xsd:decimal" default="100"
minOccurs="0" maxOccurs="1" />
    </xsd:sequence>
</xsd:complexType>

```

Valid Usage Scenarios

Saves the list of resulting members that qualify for the segment based on the most recent updated counts.

```

<saveResultSet>
    <segmentPath>[path to the segment]</segmentPath>/
</saveResultSet>

```

Saves the list of resulting members that qualify for the segment tree branch based on the most recent updated counts. The list of resulting members are extracted and saved to the specified savedSegmentPath.

```

<saveResultSet>
    <treeNodePath>
        <treePath>[path to the segment tree]</treePath>
        <treeNode>[branch ID number for a branch in the segment tree]</treeNode>
    </treeNodePath>
    <savedSegmentPath>[new segment name where resulting members are extracted and
saved to]</savedSegmentPath>
</saveResultSet>

```

When defining a Saved Result Set File formats, map the "Alias" text box (found in the column formula [fx icon] pop-up) to a physical table column name. For example, guid might map to GUID, or ROW_ID might map to TARGET_LEVEL_ID in M_SR_Account.

Usage Options

Because `saveResultSet` performs a `getCounts` on a segment or segment tree prior to saving the result set, `segmentationOptions` can be specified to customize the `getCounts`. Refer to the Usage Options of `getCounts` for `segmentationOptions` details.

writeListFiles Method

The `writeListFiles` method generates lists for list export, segment campaign load, or segment tree campaign load.

API Definition

```
<xsd:element name="writeListFiles">
  <xsd:complexType>
    <xsd:sequence>
      <xsd:element name="report" type="sawsoap:ReportRef" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="reportParams" type="sawsoap:ReportParams" minOccurs="0"
/>
      <xsd:element name="segmentPath" type="xsd:string" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="treeNodePath" type="sawsoap:TreeNodePath" minOccurs="0"
maxOccurs="1" />
      <xsd:element name="segmentationOptions"
type="sawsoap:SegmentationOptions" minOccurs="0" maxOccurs="1" />
      <xsd:element name="filesystem" type="xsd:string" />
      <xsd:element name="timeout" type="xsd:integer" />
      <xsd:element name="sessionId" type="xsd:string" />
    </xsd:sequence>
  </xsd:complexType>
</xsd:element>

<xsd:complexType name="ReportRef">
  <xsd:sequence>
    <xsd:element name="reportPath" type="xsd:string" nillable="true" />
    <xsd:element name="reportXml" type="xsd:string" nillable="true" />
    <xsd:element name="reportDef" type="sawsoap:ReportDef" nillable="true" />
  </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="ReportDef">
  <xsd:complexContent base="false">
    <xsd:restriction base="xsd:anyType">
      <xsd:sequence />
    </xsd:restriction>
  </xsd:complexContent>
</xsd:complexType>

<xsd:complexType name="TreeNodePath">
  <xsd:sequence>
    <xsd:element name="treePath" type="xsd:string" />
  </xsd:sequence>
</xsd:complexType>
```

```

        <xsd:element name="treeNode" type="xsd:string" />
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="SegmentationOptions">
    <xsd:sequence>
        <xsd:element name="removeCacheHits" type="xsd:boolean" default="false"
            minOccurs="0" maxOccurs="1" />
        <xsd:element name="countOverride" type="sawsoap:OverrideType"
            default="Default" minOccurs="0" maxOccurs="1" />
        <xsd:element name="cacheOverride" type="sawsoap:OverrideType"
            default="Default" minOccurs="0" maxOccurs="1" />
        <xsd:element name="samplingFactor" type="xsd:decimal" default="100"
            minOccurs="0" maxOccurs="1" />
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="ReportParams">
    <xsd:sequence>
        <xsd:element minOccurs="0" maxOccurs="unbounded" name="filterExpressions" />
    <!--ref="sawexpr: expr"-->
        <xsd:element minOccurs="0" maxOccurs="unbounded" name="variables"
            type="sawsoap:Variable" />
        <xsd:element minOccurs="0" maxOccurs="unbounded" name="nameValues"
            type="sawsoap:NameValuePair" />
        <xsd:element minOccurs="0" maxOccurs="unbounded" name="templateInfos"
            type="sawsoap:TemplateInfo" />
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="Variable">
    <xsd:sequence>
        <xsd:element name="name" type="xsd:string" />
        <xsd:element minOccurs="0" maxOccurs="1" name="valueXml" type="xsd:string" />
        <xsd:element minOccurs="0" maxOccurs="1" name="value" />
    <!--ref="sawexpr: expr"-->
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="NameValuePair">
    <xsd:sequence>
        <xsd:element name="name" type="xsd:string" />
        <xsd:element name="value" type="xsd:string" />
    </xsd:sequence>
</xsd:complexType>

<xsd:complexType name="TemplateInfo">
    <xsd:sequence>
        <xsd:element name="templateForEach" type="xsd:string" />
        <xsd:element name="templateIterator" type="xsd:string" />
        <xsd:element minOccurs="0" maxOccurs="unbounded" name="instance">
            <xsd:complexType>
                <xsd:sequence>
                    <xsd:element name="instanceName" type="xsd:string" />
                    <xsd:element minOccurs="0" maxOccurs="unbounded" name="nameValues"

```

```

type="sawsoap: NameValuePair" />
    </xsd: sequence>
  </xsd: complexType>
</xsd: element>
</xsd: sequence>
</xsd: complexType>

```

Valid Usage Scenarios

Generates lists for list export. One or more instance elements are specified.

```

<writeListFiles>
  <report>
    <reportPath>[path to list format]</reportPath>
  </report>

  <reportParams>
    <nameValues>
      <name>[O_name]</name>
      <value>[O_value]<value>
    </nameValues>
    <nameValues>
      <name>[1_name]</name>
      <value>[1_value]<value>
    </nameValues>
    ...
    <nameValues>
      <name>[N_name]</name>
      <value>[N_value]<value>
    </nameValues>

    <templates>
      <templateForEach>segments</templateForEach>
      <templateIterator>segment</templateIterator>
      <instance>
        <instanceName>[first name=value pair name in the instance xml element]</
instanceName>
        <nameValues>
          <name>[A0_name]</name>
          <value>[A0_value]<value>
        </nameValues>
        <nameValues>
          <name>[A1_name]</name>
          <value>[A1_value]<value>
        </nameValues>
        ...
        <nameValues>
          <name>[AN_name]</name>
          <value>[AN_value]<value>
        </nameValues>
      </instance>
    </instance>
    <instance>
      <instanceName>[first name=value pair name in the instance xml element]</
instanceName>

```

```

        <nameValues>
            <name>[B0_name]</name>
            <value>[B0_value]</value>
        </nameValues>
        <nameValues>
            <name>[B1_name]</name>
            <value>[B1_value]</value>
        </nameValues>
        ...
        <nameValues>
            <name>[BN_name]</name>
            <value>[BN_value]</value>
        </nameValues>
    </instance>
    ...
    <instance>
        <instanceName>[first name=value pair name in the instance xml element]</
instanceName>
        <nameValues>
            <name>[NO_name]</name>
            <value>[NO_value]</value>
        </nameValues>
        <nameValues>
            <name>[N1_name]</name>
            <value>[N1_value]</value>
        </nameValues>
        ...
        <nameValues>
            <name>[NN_name]</name>
            <value>[NN_value]</value>
        </nameValues>
    </instance>
</templates>
</reportParams>
<filesystem>[path to shared directory containing list files]</filesystem>
<timeout>[timeout value]</timeout>
</writeListFiles>

```

Generates list for segment campaign load. Only one instance element is specified.

```

<writeListFiles>
    <report>
        <reportPath>[path to list format]</reportPath>
    </report>

    <reportParams>
        <nameValues>
            <name>[0_name]</name>
            <value>[0_value]</value>
        </nameValues>
        <nameValues>
            <name>[1_name]</name>
            <value>[1_value]</value>
        </nameValues>
    </reportParams>

```

```

...
<nameValues>
  <name>[N_name]</name>
  <value>[N_value]<value>
</nameValues>
<templates>
  <templateForEach>segments</templateForEach>
  <templateIterator>segment</templateIterator>
  <instance>
    <instanceName>[first name=value pair name in the instance xml element]</
instanceName>
    <nameValues>
      <name>[A0_name]</name>
      <value>[A0_value]<value>
    </nameValues>
    <nameValues>
      <name>[A1_name]</name>
      <value>[A1_value]<value>
    </nameValues>
    ...
    <nameValues>
      <name>[AN_name]</name>
      <value>[AN_value]<value>
    </nameValues>
  </instance>
</templates>
</reportParams>
<filesystem>[path to shared directory containing list files]</filesystem>
<timeout>[timeout value]</timeout>
</writeLists>

```

Generates list for segment tree campaign load. Only one instance element is specified.

```

<writeLists>
  <report>
    <reportPath>[path to list format]</reportPath>
  </report>

  <reportParams>
    <nameValues>
      <name>[0_name]</name>
      <value>[0_value]<value>
    </nameValues>
    <nameValues>
      <name>[1_name]</name>
      <value>[1_value]<value>
    </nameValues>
    ...
    <nameValues>
      <name>[N_name]</name>
      <value>[N_value]<value>
    </nameValues>
  <templates>
    <templateForEach>segments</templateForEach>

```

```

<templ atel ator>segment</templ atel ator>
<i nstance>
  <i nstanceName>[fi rst name=val ue pai r name i n the i nstance xml el ement]</
i nstanceName>
  <nameVal ues>
    <name>[A0_name]</name>
    <val ue>[A0_val ue]<val ue>
  </nameVal ues>
  <nameVal ues>
    <name>[A1_name]</name>
    <val ue>[A1_val ue]<val ue>
  </nameVal ues>
  ...
  <nameVal ues>
    <name>[AN_name]</name>
    <val ue>[AN_val ue]<val ue>
  </nameVal ues>
</i nstance>
</templ atel nfos>
</reportParams>
<fi lesystem>[path to shared di rectory containi ng li st fi les]</fi lesystem>
<ti meout>[ti meout val ue]</ti meout>
</wri teLi stFi les>

```


8

Setting Up Web Marketing

Oracle's Siebel Web Marketing is an optional Siebel Marketing module that provides you with the tools and templates to manage and execute Web-based marketing. It provides the Web site visitor a method of viewing a Web offer, downloading literature, and using preconfigured Web response forms to request more information or ask you to contact them by telephone.

Siebel Web Marketing Web sites can be deployed in more than one language. For information about deploying Siebel applications in a multilingual environment, see *Siebel Global Deployment Guide*.

This chapter describes how to set up Web Marketing. It include the following topics:

- [About Web Marketing Web Site Visitors on page 139](#)
- [Setting Up Siebel Web Marketing on page 140](#)

About Web Marketing Web Site Visitors

A Web site visitor can navigate to the Web Marketing home page by typing the URL or by clicking a hyperlink on another Web page. At this point, the user is an anonymous visitor and can choose to register, log in (if they have an existing user name and password), or continue to navigate anonymously. When the anonymous visitor arrives at the Web Marketing home page, the default campaign offers and the details for the first offer in the Featured Offers list appear. If the visitor registers or logs in, the visitor sees other campaign offers for which they are eligible. For more information about default offers and default campaigns, see the description of featured offers in *Siebel Marketing User Guide*.

If a contact logs in using the contact's user ID and password, any responses generated by this customer are tagged with the customer's account ID and with the associated campaign ID. For information about setting up users, see "[Setting Up Default Responsibilities and Users for Web Marketing](#)" on page 142.

Web site visitors can also navigate to the Web Marketing site by clicking on an embedded URL from within an email offer. Only contacts or prospects receive these offers. When an email contact or email prospect clicks an embedded URL, the Web Offer page for this offer appears. Any responses to the offer from this contact or prospect are tagged with the associated campaign ID and offer ID, so marketers can track response rates for specific campaigns. For a list of responses that are captured, see "[Response Management](#)" on page 145.

Visitors access the Web Marketing home page in the following ways:

- **Anonymous visitor.** Any visitor can enter the Web Marketing URL into a Web browser and navigate to your Web Marketing home page. This visitor sees no personalized Welcome message and responses are not captured when the visitor clicks a Recommended Product link or downloads literature. An anonymous visitor can create a product information or call response by clicking on the Send Product Information or Request a Call link in the Offers page or Information page. The profile information that the anonymous visitor enters creates a prospect record that is associated with the responses.

- **Email contact.** When a contact clicks an embedded link in an email, your Web Marketing home page appears and the Contact Id is set in an anonymous session. At this point, the email contact is not logged in. The contact must be a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the contact to be a registered contact. The email contact can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the contact can log in. After logging in, the email contact becomes a logged-in contact.

If an email contact clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in before continuing.

- **Email prospect.** When a prospect clicks an embedded link in an email, your Web Marketing home page appears and the Prospect Id is set in an anonymous session. At this point, the email prospect is not logged in. The prospect must become a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the prospect to be a registered contact. The email prospect can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the email prospect must register as a new contact before the prospect can log in. In the User Login applet, the email prospect can enter a user ID and password or click the New User link to register as a new contact and obtain a user ID and password.

In the User Login view, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing. When registration is complete, the prospect is converted to a new logged-in contact. However, the original email prospect's responses are not associated with the new contact record. After logging in, the email prospect becomes a logged-in contact.

NOTE: If an email prospect clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing.

- **Logged-in contact.** This contact has access to the My Account link and can perform all other tasks that a registered contact is eligible to perform. The logged-in contact can generate responses by clicking a Recommended Product link, downloading literature, or by requesting product information or a telephone call. These responses are associated with the contact record in the database.

Setting Up Siebel Web Marketing

This section describes how to set up Siebel Web Marketing. It includes information about customizing the user interface, controlling user access, setting up responsibilities, and managing default campaigns and offers.

Before Siebel Web Marketing can be used, certain setup tasks must be performed. These include:

- [Installing Web Marketing on page 141](#)
- [Controlling User Access to the Web Marketing Web Site on page 141](#)

- [Setting Up Default Responsibilities and Users for Web Marketing on page 142](#)
- [Setting Up a Default Campaign and Default Offer on page 142](#)
- [Using Siebel Personalization with Web Marketing on page 143](#)
- [Customizing the Web Marketing User Interface on page 143](#)

Installing Web Marketing

Before you install and use Web Marketing, you must install the following:

- **Siebel Web Engine and related components.** To deploy information about the Web and customer applications, you must install the Siebel Web Engine and the components on which it depends. These include a Web server, Siebel Gateway Name Server, and Siebel Server. For information about installing Siebel components, see the Siebel Server installation guide for the operating system you are using.
- **Siebel Applications.** To perform administrative tasks such as server administration, creating Web offers, and managing marketing activities, you must install a Siebel employee application such as Siebel eSales and add the Siebel Web Marketing license key. For information about installing your Siebel employee application, see the appropriate administration guide, for example, *Siebel eSales Administration Guide*.

Siebel Web Marketing is an add-on module to Siebel Marketing. Siebel Web Marketing requires the Web Marketing Object Manager component, which is part of the Marketing Component Group. For information about installing Siebel Marketing, see [“Installing and Administering Siebel Marketing” on page 11](#) and the Siebel Server installation guide for the operating system you are using.

Controlling User Access to the Web Marketing Web Site

You may want to perform some of the following tasks to control user access in your Siebel Web Marketing Web site:

- Using external authentication using LDAP (Lightweight Directory Access Protocol)
 - LDAP is an Internet protocol that email programs use to look up contact information from a server.
- Creating database users for LDAP to use in database access
- Defining visibility for views and products
- Assigning a proxy employee
- Creating users through registration or user administration
- Associating users with accounts
- Allowing various levels of access such as Anonymous, Implicit login, and Explicit login
- Customizing access to home and login pages. For more information, see about the New User link in *Siebel Marketing User Guide*.

- Using single-sign on functionality
- Allowing another application to log in
- Adding fields to registration forms

For more information about controlling user access, see *Siebel Security Guide*.

Setting Up Default Responsibilities and Users for Web Marketing

Responsibilities control which views the users can display. The views to which a user has access determines the links and page tabs that the user sees. For example, if a user has a responsibility that does not permit access to the Credit Cards view, no Credit Cards link appears in the My Settings view. If no views within a business object are visible, the page tab that maps to that business object is not visible.

The responsibilities predefined for Siebel Web Marketing include:

- **Web Anonymous User.** Grants view visibility to anonymous users such as anonymous visitors, email prospects, and email contacts. For more information about these user enters, see [“About Web Marketing Web Site Visitors” on page 139](#). This responsibility allows the user to access views that do not have the Requires_Explicit_Login flags set to TRUE in Siebel Tools. For more information, see *Siebel Tools Reference*.
- **Web Registered User.** End user of the application in a business-to-consumer model such as logged-in contact. For more information about these user types, see [“About Web Marketing Web Site Visitors” on page 139](#). This user has registered and is recognized by the application either through their login, or because the user enters the site by clicking an embedded link in an email offer.
- **Web Corporate User.** End user of the application in a business-to-business model. A Web corporate user is associated with an account and must be authorized by the Web Delegated Customer Administrator to access the site. An administrator can add new Web corporate users.

For more information about setting up and managing responsibilities, see *Siebel Security Guide*.

Setting Up a Default Campaign and Default Offer

Assigning a default campaign and offer is part of the Web Marketing setup process. An offer associated with the default campaign can be designated as the default offer.

You specify the default campaign and default offer in the Application Administration screen in the System Preferences view. To assign a default campaign, complete the Default Campaign Source Code field. To assign the default offer, complete the Default Offer Code field.

The default campaign and default offer determine which offers are presented to the customer during their Web Marketing session. These offers appear in addition to any targeted offers such as an embedded link in an email offer.

CAUTION: The default campaign must be a campaign not a campaign plan. If you associate the default campaign with the campaign plan, the response records from your campaign are not associated correctly.

For more information about default offers and default campaigns, see the Featured Offers topic in *Siebel Marketing User Guide*.

Using Siebel Personalization with Web Marketing

Siebel Personalization delivers personalized content and offers to a customer profile, needs, interests, and history. Personalized content includes greeting users by name, presenting them with content targeted to their needs and interests, and showing them recommended products and offers based on their needs and history.

Using Siebel Personalization, you can define rules to show and hide content dynamically during a user's experience with Siebel Web Marketing. Personalization deployment rules can depend on data such as user's profile information, date ranges, company information, products and services they already purchased or reviewed, and specific session information.

The home page in Siebel Web Marketing includes the salutation applet in the upper left corner. It typically includes a personal greeting but it can be configured to deliver targeted content such as product promotions, announcements, birthday greetings, and offer updates. The home page also contains a list of recommended products and featured offers, both of which can be personalized based on user-specific information. Conditional expressions can be used to hide applets under certain conditions.

You manage personalization in the Personalization Administration screen in your Siebel Application. For information about administering personalization, see *Siebel Personalization Administration Guide*.

Customizing the Web Marketing User Interface

The product provides a set of Web templates and cascading style sheets (CSS) to create the look and feel of an Oracle Siebel application. Customers can create their own look and feel by modifying corporate logos, colors, and fonts in the style sheets and Web templates. When modifying these elements, make sure you save a backup copy in case you need to restore the original files.

NOTE: These elements are not automatically upgraded during the upgrade process.

The Siebel Web architecture uses the Siebel Web Engine (SWE) to dynamically generate HTML pages. The SWE uses configuration information in the Siebel Repository (SRF) and HTML layout information in the Siebel Web Template (SWT) to merge data with the template when creating the HTML page.

To customize the Web Marketing User Interface, perform the following tasks:

- [Modifying Web Templates on page 144](#)

- [Implementing Web Marketing Without Frames on page 144](#)
- [Full-Text Search on page 145](#)
- [Response Management on page 145](#)

If you are using Web Offers with a custom Web site rather than the prebuilt SWE-based microsite, do not use the standard response types such as Downloads, Request Unsubscribe, Web Survey, and so on. These response types do not work because they generate SWE-based URLs that do not function without additional scripting. An easier solution is to use related URLs for your hyperlinks.

Modifying Web Templates

A Web template defines the layout and formatting elements of the user interface (UI), such as views, applets, and controls. You associate these UI elements with the templates in Siebel Tools. The associated information is stored in the SRF file. For example, you might have a View object with three applets. You associate a View Template with the view, and map each applet to a placeholder in that template. The advantage of this approach is that the UI objects in the repository are not hard-coded in individual templates. As a result, a number of View objects can share the same template if they share the same layout. The same process and design applies to Applet objects.

The three primary templates types are Container, View and Applet. The final HTML pages created by the SWE places the applet in the view and the view in the container. Siebel Business Applications provide numerous applet and view templates with the product. They can be viewed in Tools, but are edited in an external editor. For information about the physical user interface layer, see *Siebel Tools Reference*.

The following is a list of some modifications available to change the look and feel of your Web site:

- Modifying Views and Applets
- Modifying Web Templates
- Changing colors
- Modifying behavior caused by clicking a button
- Adding or removing applets
- Changing controls
- Making fields in a form appear

For more information about customizing the user interface, see *Siebel Tools Reference*.

Implementing Web Marketing Without Frames

Customer and partner applications use HTML frames for compatibility when running in browser-based applications. HTML frames create portions of the browser window that can scroll independently of the rest of the window. For example, you can place the navigation elements in one frame and content in another frame. You can scroll the content while the navigation elements remain in a fixed location.

Customer and partner applications can be implemented without using frames. Before choosing this method, consider the following limitation. In an unframed application, all UI elements exist in the same window. Therefore, the contents list may scroll off the page as a user scrolls down. For example, if the user scrolls down to review content, the navigation elements may not be visible.

Full-Text Search

Siebel Search for Customers is a subset of the Siebel Search product. Users can scan database tables and documents for pertinent information. Siebel Search is included with every license of an Oracle Siebel application. For information about Siebel Search and Siebel Search for Customers, see *Siebel Search Administration Guide*.

Response Management

Siebel Web Marketing captures a series of responses during a customer interaction. Siebel Web Marketing supports automatic capture of the following responses:

- Clicked on Web Offer. Captured when the recipient clicks the embedded link for a Web offer in an email offer.
- Clicked on Product URL. Captured when the recipient clicks the embedded link for the product in an email or Web offer.
- Clicked on Web Survey. Captured when the recipient clicks the embedded link for the Web survey in an email or Web offer.
- Completed Web Survey. Captured when the recipient clicks Finish on the Web survey view. The survey answers are captured if the Save Answer field is checked for the question on the Smartsript Administration views. For more information, see *Siebel SmartScript Administration Guide*.
- Downloaded Info/File. Captured when the recipient clicks the embedded link for the document that is downloaded in a Web offer.
- Requested Unsubscribe. Captured when the recipient submits their subscription preference updates after clicking the embedded link in the email offer. In addition to the response, the contact profile is updated.
- Requested call back. Captured when the recipient submits their request after clicking the embedded link in an email or Web offer.
- Requested more info. Captured when the recipient submits their request after clicking the embedded link in an email or Web offer.
- Submitted Source Code. Captured when a contact or prospect enters a source code and offer code in the Do you have Another Offer form in the Offers page.

Preconfigured Values for the COMM_RESPONSE_TYPE LOV

The following table shows the list of values for the COMM_RESPONSE_TYPE LOV that are seeded in the preconfigured Marketing product.

CAUTION: The values that either trigger specialized logic or are automatically set by various features of the application must not be changed or deleted.

Table 23. Preconfigured Values for the COMM_RESPONSE_TYPE LOV

Values	Values Triggering Specialized Logic or Automatically Set
Language-Independent Code	Clicked on Product URL Clicked on Web Offer Clicked on Web Survey Completed Web Survey Downloaded info/file(s) Email Bounceback Email Reply
Rejected	Requested Unsubscribe Requested Call Back Requested More Info Respondent Purchased
Respondent Unreachable	Response Created Opportunity Read Receipt
Unclassified Response	
No Interest	
Respondent Interested	
Accepted Invitation	
Declined Invitation	
Gave Referral	
Requested Further Engagement	Submitted Source Code Clicked on URL
Attended	
Cancelled	
Confirmed	
Invited	

Table 23. Preconfigured Values for the COMM_RESPONSE_TYPE LOV

Values	Values Triggering Specialized Logic or Automatically Set
No Show	
Pending	
Waitlisted	
Walk-in	Clicked on Event URL Forward to Friend Unsubscribe from List Subscribe to List One Click Unsubscribe Confirm Unsubscribe from List Confirm Subscribe to List

Additional responses and Siebel events can be captured through configuration. For more information, see event tracking topics in *Siebel Tools Reference*.

Deletion of Phone and Web Offers

Active offers of type Phone or Web cannot be deleted by default. This prevents users from deleting offers that are in progress. You can override this delete protection at your own risk.

To override offer deletion protection

- 1 Start Siebel Tools.
- 2 Locate the Phone Offer or Web Offer Business Components.
- 3 Set the “No Delete Protection” user property to “Y”.

9

Configuring Marketing Module Metadata

This chapter describes how to configure marketing module metadata. It includes the following topics:

- [About Marketing Segmentation Metadata on page 149](#)
- [Setting Up Marketing Segmentation Metadata on page 154](#)

About Marketing Segmentation Metadata

Segmentation is the practice of dividing a customer base into groups that are similar in specific ways such as demographics or behavior that are relevant to marketing. Marketers use segmentation to target groups of customers and allocate marketing resources effectively.

Typically, customer segmentation involves the following activities:

- Collecting data from a variety of sources and integrating the data into a single view of the customer base.
- Determining the quantity of customers or potential customers who share certain characteristics.
- Identifying a group of target customers for the purpose of delivering a marketing treatment or message.

Typically, customer types targeted for marketing messages are individuals, businesses, or households. However, special circumstances might call for segmentation to be performed for other entities such as bank accounts, opportunities, or assets. Segmentation involves grouping these targets based on a specified set of characteristics. You specify these characteristics by executing criteria against the customer data set. The criteria that you use to identify targets can be simple or complex and is usually based on Boolean-type logic using set operations and parenthetical operations.

For example, a marketer might identify high-value customers that have a risk of churn based on the following customer characteristics:

(Customers in the top 10 percent based on total order revenue Or Customers in the top 10 percent based on the volume of orders)

AND

(Customers who have not bought anything in the last 1 year)

AND

(Customers whose average service resolution time exceeds the company average)

By expressing such criteria in a sequential fashion, you refine a group of targets.

Terminology Used for Marketing Metadata

To support the segmentation process, the Siebel Analytics Administration Tool provides a special set of Siebel Marketing metadata. This topic describes the following Marketing metadata entities:

Target Levels

A target level is the entity that a marketer wants to count. Target levels are usually customer types such as individuals, businesses, or households. However, in special circumstances a target level might also represent other entities such as bank accounts, opportunities, or assets.

To support counting, the metadata definition for a target level specifies a column in the database table that uniquely identifies the target such as Customer-ID, Account-ID, or Household-ID. Target levels can be combined in a segment. For example, a segment might be created that counts the number of contacts who live in households that satisfy a certain criteria.

Segmentation Catalogs

A segmentation catalog is a Siebel Analytics subject area (presentation catalog) that is enabled for segmentation. The segmentation catalog provides a set of dimensions and fact measures that can be used to create segment criteria. The Marketing module user interface combines the counts across segmentation catalogs using the KEEP/ADD/EXCLUDE operators. A segmentation catalog must contain mappings from only one physical star or snowflake schema.

To define a segmentation catalog, use the following guidelines:

- Explicitly associate the presentation catalog with a target level. This makes the catalog visible in the Marketing module user interface.
- Identify the column in the segmentation catalog that needs to be counted for the target level. If the physical star schema of the segmentation catalog does not contain the dimension that needs to be counted for the Target Level, a conforming dimension needs to be identified. For additional information about conforming dimensions, see [“Conforming Dimensions” on page 151](#).
- Specify an implicit fact for each presentation catalog that is enabled as a segmentation catalog. This is required because two different segmentation catalogs can contain the same two dimensions. This can result in an ambiguous query to the database. This implicit fact column must be an aggregate measure that is not filtered. This is typically the measure that counts the primary key column on the fact table.

For example, there might be many star schemas in the database that have the Campaign dimension and the Customer dimension, such as the following stars:

- Campaign History star. Stores customers targeted in campaign.
- Campaign Response star. Stores customer responses to a campaign.
- Order star. Stores customers who placed orders as a result of a campaign.

In this example, because Campaign and Customer information might appear in many segmentation catalogs, users selecting to count customers from the targeted campaigns catalog would be expecting to count customers that have been targeted in specific campaigns.

- To make sure that the join relationship between Customers and Campaigns is through the campaign history fact table, a campaign history implicit fact needs to be specified in Campaign History segmentation catalog. Consider the following guidelines when creating segmentation catalogs:
 - Create each segmentation catalog so that all columns come from only one physical star.
 - Because the Marketing module user interface has special features for users to specify their aggregations, level-based measures typically are not exposed to segmentation users in a segmentation catalog.

Sampling Factors

Complex segmentation criteria evaluated against a large database can take significant time to execute. Initially, marketing users might be satisfied with an approximate count so that they can execute counts more quickly, and then adjust the criteria until they obtain more precise counts.

To facilitate quick counts, the Marketing Server can execute segmentation criteria against a sampled subset of the target-level data. Sampling works on the principle that if the segmentation criteria are applied to the sampled subset of customers, and then subsequently to each of the star accessed by the segment criteria, the final count is a good approximation of the actual (100 percent) counts and executes more quickly.

Sampling is defined by creating a subset table for a target-level dimension table that contains the same set of columns, but only a percentage of the data. For every sampling factor a database table needs to be created. Each sampling definition includes a percentage value to indicate the sampling factor. Every target level can have many sampling factors (and corresponding sampled dimension tables) to provide multiple levels of sampling.

When you enable sampling, the Marketing Server continues to generate the same logical SQL. However, the Analytics Server generates physical SQL that queries against the configured sample tables using dynamic table names. For the dimension table (such as the Contact dimension table) that contains all target-level IDs, a dynamic table name is associated with the target-level table. If the value of the dynamic table name session variable is set to the sampled table, then all queries executed in that session that include the customer dimension table are executed against the sampled table. The session variable is automatically set to the appropriate sampling table, depending on the sampling factor chosen in the user interface for all counting tasks.

Make sure the sampled table contains a true random sample of the customers. The choice of the randomization method is determined by the business users and administrators. The technique chosen here dramatically affects the degree of accuracy of the sampled counts.

NOTE: Taking the first, specified-percent of rows from a target-level table, does not usually yield a random sample.

Conforming Dimensions

Conforming dimensions can be used when a star might include a dimension with the target-level ID. A conforming dimension links a fact that contains target-level IDs to a fact that does not contain target-level IDs by navigating along a dimension that is shared by both fact tables.

For example, a bank might track service requests at the bank-account level only and the Service Request star does not include the customer dimension. To be able to count the number of contacts who have filed a certain number of service requests, a conforming dimension is required. In this case, the conforming dimension is the Bank Account dimension, because it is a dimension shared by both the Service Request star and another star containing the Bank Account dimension, such as the Customer Profile star. To evaluate this count, the Marketing Server determines the bank accounts that satisfy the service request criteria, and then finds all customers who join to those bank accounts using a subquery. For more information, see [“Setting Up Conforming Dimension Links” on page 179](#).

List Catalogs

Use List catalogs to create vendor files for campaign fulfillment or files for loading a campaign with appropriate targets. A Siebel Analytics Subject Area is a list catalog in the Presentation layer of the Siebel Analytics Administration Tool that is enabled for list format design (list generation). The list catalog provides a set of columns that can be used to generate the content in a list file or used to filter the results of the list file. Enabling a list catalog requires a few configuration steps because not all presentation catalogs are appropriate for use as a list catalog.

- **Configuration for changing the level of detail of the list generation query.** Unlike a segmentation catalog, a list catalog can contain information from multiple facts and data sources. This is often required because the content of export files might include a set of columns that span across several facts.

When generating a list, marketers usually need all columns in the list to show information at the target level such as Individual, Account, and Household. However, measures in a report are typically reported by dimensions placed in the report. To make sure that these measures evaluate at the Target Level, the business model for these List catalogs needs modifications. For more information about building a business model, see [Setting Up the Marketing List Catalogs on page 175](#). For a standard presentation catalog, a query returns all rows in the data that satisfy the filter criteria, whether or not there is a single row for each target level. For example, if the list format contains columns for Contact Name, Asset Number, and Order Revenue, then the Revenue information is returned for every Asset that the contact owns.

To compensate for this behavior, a list catalog needs to be configured so that a single row can be returned for each target level when required. This is accomplished by creating a metadata metric that ranks on the secondary attribute by the target level. For example, to pull the first asset for each contact, create a rank on the asset name by contact.

- **Configuration to eliminate query ambiguity.** Often presentation catalogs are created that span the same dimension in multiple facts. For example, if Assets are queried, there is potential ambiguity because it is unclear whether you intended to retrieve assets that the target level (Contact) owns (Asset star), assets that have been serviced (Service Request star), or assets that are expiring (Contracts star). A query from each of these stars likely returns a different set of target-level IDs. In a list generation query, avoid ambiguity about the source of the asset dimension data and related target-level IDs.

To make sure that dimensional entities such as Assets and fact measures such as Revenue appear at the target level and that ambiguities between dimensions are eliminated, the business model mappings in the Administration Tool needs to be different than what is typically used for reporting. Therefore, an existing catalog used for reporting is usually not appropriate. You must create new business models and new catalogs in the Administration Tool to be specifically used for list output.

List catalogs fall into the following categories, each supporting different business requirements:

- **List Output Catalogs.** When a campaign is launched and a list of targets needs to be generated for channel-related fulfillment, list catalogs are used to extract the members of the campaign and their related contact information. In the Siebel Marketing application, this type of list catalog is used for vendor files (List Export formats) and Email Server formats.
- **Campaign Load Catalogs.** When you finish designing the segment criteria, the next step is to load the target members of the segment into a campaign for execution. Within the Siebel Marketing application the task of loading segment members into the campaign history is performed by a workflow process leveraging the Siebel enterprise application integration (EAI) interface. This process expects the list file of segment members to be formatted according to EAI specifications, in which each column header must exactly match the name of the Integration Component and Integration Component field name where the data loads. List catalogs used for the Campaign Load process are configured so that the presentation column names match the Integration Component field names expected by the EAI process.

Lists for campaign load and list output can be invoked from an external application using SOAP APIs and then the Siebel Marketing Server can be integrated into a third-party campaign management system. For more information about SOAP APIs, see *Oracle Business Intelligence Web Administration Guide*.

Qualified List Item (QLI)

A qualified list item (QLI) is an entity that is evaluated against segment criteria so that the information related to that entity can be exported in a list file. A QLI can be of type Primary or Secondary. A primary qualified list item is the presentation column that maps to the dimension key that is being counted for a target level such as Contact-ID for the contact target level. A secondary qualified list item is primarily created for list exports. Use a QLI to restrict the list based on the logic used in the segmentation criteria.

For example, you might have a segment containing all customers who have a vehicle lease expiring in less than two months. You plan to create a list for this segment and Vehicle ID is one of the list columns. If you do not create a secondary QLI, the list contains vehicles that the customers in the segment own and it does not matter if the lease expires in less than two months. If you create a secondary QLI on the Vehicle-ID, the list contains only vehicles with leases expiring in less than two months (qualified) from the segment.

For more information, see [“Setting Up Marketing Qualified List Items” on page 180](#).

Caching

Segmentation criteria blocks that count target-level identifiers can be used frequently. For example, an email marketer can always exclude contacts with no email address or those that have explicitly refused to receive emails. Instead of evaluating this set of contacts repeatedly in every segment, the marketer might create a single criteria block using this criteria. Caching such a criteria block saves the list of target-level identifiers in a table. When you reuse this criteria across segments that you create, the cache is used and time-consuming database query operations are minimized, improving throughput.

The set of tables that contain the cache information, the mappings of those tables in the Administration Tool, and assigning cache table schema to specific target levels, constitute the cache related metadata.

Saved Result Sets

The resulting set of target-level identifiers of complex segmentation criteria can be saved permanently (until explicitly deleted). The saved result set can be used in other segments but more importantly it can be used to keep track of which targets joined and left a segment. This kind of an analysis helps marketers understand the dynamic behavior of the customer base. The target-level identifiers are stored in a table. The set of tables that contain the saved result set information, the mappings of those tables in the Administration Tool and the assigning of saved result set schema to specific target levels, all constitute the related metadata.

Setting Up Marketing Segmentation Metadata

The setup instructions in this section assume that you have mapped the business models for reporting purposes and created some presentation catalogs.

The following topics describe the setup of Marketing metadata:

- [Create Segmentation Catalogs for Physical Star Schemas on page 155](#)
- [Assign an Implicit Fact in the Segmentation Presentation Catalog Property on page 155](#)
- [Creating Target Levels and Adding Segmentation Catalogs on page 156](#)
- [About Setting Up Cache for Target Levels on page 158](#)
- [Setting Up Cache for Target Levels on page 160](#)
- [Enable Sampling for the Target Level on page 165](#)
- [Setting Up Saved Result Sets for Target Levels on page 168](#)
- [Setting Up the Marketing List Catalogs on page 175](#)
- [Setting Up Conforming Dimension Links on page 179](#)
- [Setting Up Marketing Qualified List Items on page 180](#)

- [Controlling Marketing Vendor List Query Details on page 183](#)

Create Segmentation Catalogs for Physical Star Schemas

You must create a Catalog for every physical star schema that needs to participate in segmentation. Typically, this requires performing the following tasks:

- Creating new catalogs.
- Dragging presentation columns from other reporting catalogs into the appropriate segmentation catalogs.
- If certain measures are absent in existing reporting catalogs, they must be brought into the segmentation catalogs from the business model layer.
 - Do not bring level-based measures in to the segmentation catalog, unless there is a specially mapped measure that improves performance drastically. The Marketing module user interface provides for aggregating measures.
 - Do not bring in measures that are ratios based on a combination of stars. For example, Opportunity to Order Conversion Ratio. Remember, each segmentation catalog must contain information from one star only.

When marketers want to segment on a star where they want to counts customers where the rows in the fact table satisfy a certain criteria then the fact table can be mapped as a dimension also. For example, if a marketer wants to find customers where any of their orders is greater than \$50, then to support this kind of a querying, the order fact logical table needs to be mapped as dimension.

Assign an Implicit Fact in the Segmentation Presentation Catalog Property

For every segmentation catalog, you must assign an implicit fact in the presentation catalog property. Use the following guidelines when you select the implicit fact column:

- The implicit fact column must be based on the same fact around which the presentation catalog has been built. For example, if the presentation catalog contains information from the Order star, the implicit fact column must be based on the Order/Order-Item fact.
- The implicit fact is the least restrictive. For example, if the ROW_WID column in the fact table is the primary key of that table, then the implicit fact column is a Count (ROW_WID). If no such measure exists in the Logical Fact then create it. Alternatively, you can define a logical column that has a calculation such as max(1) or sum(1).

To assign an implicit fact in the presentation catalog property

- 1 In the Presentation layer of the Administration Tool, double-click a presentation catalog to participate in segmentation.

- 2 In the Presentation Catalog dialog box, click the General tab.
- 3 In the Implicit Fact Column section, click Set.

The logical facts in the business model from which the presentation catalog was created appear.

- 4 In the Browse dialog box, open the appropriate logical fact folder such as Fact - Campaign History, select the appropriate measure, and then click OK.

Guidelines for Testing an Implicit Fact in the Presentation Catalog Property

Use the following guidelines to test the inclusion of implicit fact after starting the Siebel Analytics Server.

- Navigate to Siebel Answers.
- Select the presentation catalog and create a report by selecting two dimensional attributes that have ambiguity with respect to facts.
- Do not put the fact column in the report.

For example, in an Order/Order-Item catalog, select a column from the Customer table and another column from the Product table.

Customer and Product are typically related in many ways. Customer could have service requests for a product, they might own an asset on a product or they might have quote or an order on a product. However, when running this report on this catalog with the implicit fact assigned, verify that the physical query included the order/order-item fact.

Creating Target Levels and Adding Segmentation Catalogs

Customers who have purchased the Siebel Data Warehouse version 7.7.1 have preconfigured Contact and Account target levels. In the Siebel Data Warehouse version 7.7.1, most stars in the Siebel eBusiness Application have a corresponding presentation catalog and have been added to the preconfigured target level.

Every target level must have a primary segmentation catalog. Every time a target level is selected in the Marketing module user interface, the primary catalog is selected by default as the starting catalog for segmentation. For example, if the target level is Customer, a primary catalog counts every customer in the database.

NOTE: You are not required to start the segmentation from this catalog.

You can create as many target levels as you need. When creating target levels and primary QLI, use the following guidelines:

- You can associate the same primary QLI with multiple target levels.
- Any dimensional entity can be used as target level depending on the business need. For example, Asset, Order, Opportunity, Product, and so on.

You can duplicate existing target levels. Duplicating a target level also duplicates its segmentation catalog children, the sampling tables, and the qualifying keys related to the segmentation catalog.

To create target levels

- 1 In the Administration Tool, open your repository.
- 2 From the menu bar, click Manage > Marketing.
- 3 In the Marketing Metadata dialog box, in the left pane, click Target Levels.
- 4 Right-click in the right pane and select New Target Level.
- 5 In the Target Level dialog box, in the General tab, type the name of the target level in the Name field.
- 6 (Optional) To restrict the visibility of a target level, click Permissions and select the appropriate options.
- 7 (Optional) To assign a custom display name to the target level, check the Custom display name check box and add a different string in the box next to it.
This string appears in the Marketing module user interface.
- 8 To create and assign a new primary qualified list item to this target level, perform the following steps:
 - a Click New next to the Primary Qualified Item field.
 - b Type the name of the qualified list item (QLI) in the Name field.
 - c Type a description that describes the technical details of this QLI, especially information on what specifically it counts.

NOTE: For information about the Cache Information tab, see the topic about creating and mapping a Marketing presentation catalog in [“Setting Up Cache for Target Levels” on page 160](#).
- 9 If a primary qualified list item for this target level has already been created, you associate the primary with the target level by clicking Browse and selecting the qualified list item.

Repeat this task to create each target level that you need.

To select a primary segmentation catalogs for the target level

- 1 From the toolbar, choose Manage > Marketing.
- 2 In the left pane, highlight Target Levels and in the right pane, double-click a target level.
- 3 In the Target Levels dialog box, click the Segmentation Catalogs tab.
- 4 To select a primary segmentation catalog, click the Segmentation Catalog tab.
If queried from this catalog, the result is a superset of the target level.
- 5 In the Segmentation Catalog tab, select one of the segmentation catalogs and click Set Primary.

To add segmentation catalogs to an existing target level

- 1 From the toolbar, choose Manage > Marketing.
- 2 In the left pane, highlight Target Levels.
- 3 In the right pane, double-click a target level.
- 4 In the Target Levels dialog box, click the Segmentation Catalogs tab and then click Add.
- 5 In the Segmentation Catalog dialog box, click the ellipsis button.
- 6 In the Browse dialog box, select a presentation catalog to include in the segmentation process.
- 7 Click Permissions if you want to restrict the visibility of this catalog to a specified group of users or groups.
- 8 For the Qualifying Keys area, click Add.

In the Qualifying Key dialog box, the Qualified List Item field contains the primary QLI. It is preselected based on the target level in the segmentation catalog that you select in [Step 6 on page 158](#). A primary QLI key is required unless the segmentation catalog uses conforming dimensions.

CAUTION: Do not change the preselected primary QLI, unless the catalog uses conforming dimensions.

- 9 Click Browse next to the Column field.
- 10 In the Browse dialog box, select the presentation column that represents the unique identifier of the target level.

The list contains all the columns in the presentation catalog that you added as a segmentation catalog.

Repeat this task for every segmentation catalog that you want to add to the target level.

To duplicate a target level

- 1 In the Administration Tool, open your repository.
- 2 From the menu bar, click Manage > Marketing.
- 3 In the Marketing Metadata dialog box, in the left pane, click Target Levels.
- 4 In the right pane, right-click a target level and choose Duplicate.

About Setting Up Cache for Target Levels

Marketing Server Cache has the following distinct properties:

- Criteria blocks are not cached by default. Users have to explicitly select the criteria blocks that they want to cache. This behavior is different than that of the Siebel Analytics Server cache. The exception is with segment trees where segment and remainder nodes are automatically marked for caching. In general, these nodes make good candidates for caching because the SQL to compute these nodes are usually expensive.

- Marketing Server Cache is temporary and it expires after a certain time. This is unlike the Siebel Analytics Server cache that is recycled based on disk size limit specified. The expiration time is configurable and is set in the following file:

SiebelAnalyticData\Web\Config\instanceconfig.xml file

The name of this parameter is MarketingCacheMaxExpireMinutes. When this value is not set, the default value used by the Marketing Server is 24 hours.

- Marketing Server Cache is stored in multiple tables with a fixed schema for each target level, unlike the Siebel Analytics Server cache that is stored in a file system.
- Marketing Server Cache entries are managed through the Admin link in the Siebel Analytics Web interface, unlike the Siebel Analytics Server cache that is managed through the Administration Tool. These entries can be found under the Database Cache section after you click Manage Marketing Jobs link.
- Caching of the same entity with different sampling factors creates different cache entries for each sampling factor for which the counts were run. If a criteria block was cached for a 20 percent sample and then, if counts are run for a sampling factor that is different, cache is not used.
- When updating counts, you can select the Refresh Cache property to make sure that you only query against the latest data. Any cache entries that would have been reused are deleted during this job.

Managing Marketing Cache

If you purchased the Siebel Data Warehouse version 7.7.1, the cache tables have been preconfigured and appropriately modeled in the Administration Tool. Use this topic to support users, troubleshoot issues, and maintain the cache tables. Perform the steps outlined in this topic if you create new target levels that were not preconfigured with the product.

To understand and maintain the Marketing Server cache, follow these guidelines:

- Set the expiration parameter for the marketing cache to a value such that maximum response time efficiency is gained. The value is typically less than the database refresh frequency.
- After the database is refreshed, purge the affected caches before you start using segmentation.
- Cache can be removed for each user. For example, the cache entries that were created by a particular user can be removed without deleting all of the cache entries.
- Individual cache entries for a user cannot be deleted. You can delete all cache for a user or none.
- There is a limit to the number of cache entries that can be managed by the Marketing Server at any given time. This information is specified by the MarketingCacheMaxEntries parameter in the SiebelAnalyticData\Web\Config\instanceconfig.xml file. After the limit is reached then the oldest cache entries are removed approximately 20 percent at a time. The entries are removed from the Siebel Analytics Web and the specific Cache information is deleted from the database table.
- When Caching a criteria block, if the criteria block SQL can be fully function shipped to the database, then evaluation of the criteria block and the population in the cache is done in one single operation for efficiency purposes. If the criteria block SQL cannot be function-shipped then cache is created in two steps where the first one evaluates the criteria block and the second step populates the target-level IDs into the cache.

- The references to the cache entries are maintained in the Siebel Analytics Web Catalog. Therefore, if the Catalog file is replaced, then entries from the old catalog file are typically moved to the new catalog file.

Recommendations for Using Cache

The following are some recommendations for when to use cache:

- Criteria blocks that are used in segmentation by a user might be used frequently across the segments created by that user. For example, a product manager for a particular product might only be interested in customers who own that product. Most of the segments created by this manager might include a criteria block that specifies owners of that product. To minimize resource-intensive database operations, cache the results of frequently used criteria blocks and use this cache for subsequent queries.
- When using complex criteria in a criteria block, especially against a large table, it may take a long time for the counts to return.
- When you use complex segmentation logic that spans criteria blocks and issues a large number of queries against the database, it usually takes a lot of time to evaluate. Save the segmentation logic as a separate segment and use it as a nested segment inside the full segment report. This type of nested segment is a good candidate for caching.
- When the use of a segmentation logic issues a query that is not directly supported by the database, these queries might be evaluated by the Siebel Analytics Server. For example, a database platform might not support the intersect operator in its SQL syntax. This operator is used when you use the Keep operator for a criteria block in the Marketing module user interface. When such a criteria block is evaluated with other blocks, the intersect operation does not occur in the database and is evaluated by the Siebel Analytics Server. To improve response time for users of Siebel Analytics Server (Marketing module and Analytics reports), cache the results of such a logic.
NOTE: If you need to run the same query again, the results can be retrieved directly from a database cache.
- Caching is automatically used by the Marketing Server when splitting nodes in a segment tree, where the splitting logic requires the calculation of intermediate results. For example, when Random Splitting is used.
- When Caching a criteria block the gross count and not the cumulative count is cached. This is because if criteria block is moved within the segment, the cached results can be reused.

Setting Up Cache for Target Levels

This topic discusses the following topics about setting up cache for target levels:

- [About Marketing SQL Files and Cache on page 161](#)
- [Building a Marketing Business Model on page 161](#)
- [Creating and Mapping Marketing Presentation Catalogs on page 162](#)
- [Setting Up the Web Administrator for Managing Cache and Saved Result Sets on page 163](#)

About Marketing SQL Files and Cache

In the Siebel Analytics install directory, there is a directory named schema. This directory contains the preconfigured Marketing SQL files: MKTG.DB2.sql, MKTG.MSSQL.sql, and MKTG.Oracle.sql.

These files contain the DDL (data definition language) statements for creating the cache and the saved result set tables. Depending on the database that you use for segmentation, open the appropriate file and execute the statements against the database. For more information about the SQL files and cache, see [“About Marketing SQL Files and Saved Result Sets” on page 169](#).

The following guidelines apply to using the Marketing SQL files with cache:

- Make sure that the statements are syntactically correct for the version of the database that is being used. For example, the MKTG.DB2.sql file might not contain the appropriate syntax for the specific version of DB2 that is being used.
- Make sure that the data types of the QUALIFIED_ID column matches the data type of the target level. For example, if a cache table is being created for the target-level Household and the Household ID in the database is of type INT, then the QUALIFIED_ID must be of the same type.
- For every target level a separate table needs to be created. The naming convention for the table is M_C_<target level>. Although the cache table can be named with any name that is database supported, for the purposes of the following discussion the existing naming convention is assumed.
- Do NOT change the name and type of the GUID column.
The value in the GUID column is a unique identifier that identifies the saved result set.
- Execute the statement that relates to creating the Cache table and the corresponding index.
- For information about statements relating to the creation of Saved Result Sets, see [“Setting Up Saved Result Sets for Target Levels” on page 168](#).

Building a Marketing Business Model

This topic contains guidelines for building your marketing business model in the Business Model and Mapping layer of the Analytics Administration Tool. [Figure 6 on page 161](#) is an example to help you build your business model.



Figure 6. Example of a Mapped Fact Table

The following examples describe the business model structure that appears in [Figure 6 on page 161](#):

- Mapping Fact Tables. Use the following convention, or a similar convention, when naming fact tables:

Fact - Marketing <target level> Cache

For example, for the target level Contact, a table might be named Fact - Marketing Contact Cache.

- Building a join in the business model. After mapping a fact table, you must set up a join only in the Business Model and Mapping layer as described in the following example:

The corresponding logical dimension table for the target level is joined to the Fact - Marketing <target level> Cache. The join must be a logical 1:M join starting from the target level logical dimension table (1) and going to the Fact - Marketing <target level> Cache logical table (M).

Creating and Mapping Marketing Presentation Catalogs

Create a marketing presentation catalog by performing the following tasks:

- Create a folder named Cache.
- Create a marketing presentation table. Name the Cache presentation table using the following convention:

<target level> Cache (This identifies the cache that belongs to each target level.)

- Add columns to the marketing presentation table. For example, add the GUID column and the Qualified-ID column to the <target level> Cache folder by dragging them from the Fact - Marketing <target level> Cache logical table, shown in [Figure 6 on page 161](#).
- Associate cache metadata with a target level.

NOTE: Any Marketing user who writes a cache entry or saves a result set needs to be assigned the POPULATE privilege for the target database. Typically, Marketing users are associated with a group and this group is granted the privilege. Go to Manage->Security and open the Permissions dialog for either a user or group. Select the Query Limits tab and set the Populate Privilege to Allow for Marketing data warehouses. For more information, see the topic about assigning populate privilege to a User or Group in *Siebel Analytics Server Administration Guide*.

To associate the cache metadata with a target level

- 1 In the Administration Tool, open your repository in Offline mode, using Administrator/ <password>.
- 2 From the toolbar, choose Manage > Marketing.
- 3 In the left pane, select Qualified List Items and double-click the primary QLI of the target level to enable for caching.
- 4 Click the Cache Information tab and perform the following steps:
 - a Click the Cache Catalog ellipsis button and select the presentation catalog that has the presentation table for the Cache table for the target level.
 - b Click the GUID column ellipsis button and select the presentation column that has the GUID information.

- c Click the Qualified Id column ellipsis button and select the presentation column that has the qualified ID for the target level.

The columns and catalogs selected are the same as those that you mapped. The physical table and connection pool information is automatically selected.

- 5 Verify that the information is correct. If not correct, verify that you selected the correct presentation catalog and columns as instructed in [Step 4 on page 162](#).
- 6 Click Default SQL.

A statement that is similar to the following appears:

```
DELETE FROM M_C_<target level> WHERE GUID = '@{gui d}'
```

NOTE: Make sure that the syntax of this statement is correct for your database. The table name might need to be fully qualified. Test this statement by inserting some value in the database table and using the delete statement to delete it.

- 7 Click OK, and then check the Marketing metadata for consistency.

Setting Up the Web Administrator for Managing Cache and Saved Result Sets

Some queries issued by the segmentation engine require the use of the Execute Physical stored procedure. These queries include delete statements on the cache, delete statements on the saved result sets, and insert statements for the cache and saved result set. The Execute Physical stored procedure must be run by a user with administrator privileges. The administrator user is setup in the instanceconfig.xml file.

NOTE: The Analytics Administrator password and login parameters are case sensitive.

To set up the administrative user in the instanceconfig.xml file

- 1 Start the Siebel Analytics Web service, and then open your Siebel Analytics URL.
For example, `http://localhost/analytics/saw.dll?EncryptString&String=< type Siebel Analytics Administrator password>`
- 2 Log in as the Administrator.
- 3 Copy the encrypted string in the browser window to a text file.
- 4 Navigate to the instanceconfig.xml file at the following default location, and then open it using a text editor:

```
SiebelAnalyticsData\Web\Config\
```

CAUTION: Do not open in Explorer or double-click the instanceconfig.xml file name.

- 5 Scroll down to the <WebConfig> section that is at the bottom of the file.

NOTE: The instanceconfig.xml file contains two sections. The Top section is commented out. Do not modify the first set of comments.

The <WebConfig> in your file should be similar to the file in the following example.

```
<WebConfig>
  <ServerInstance>
    <AdministrativeLogin>Administrator</AdministrativeLogin>
    <AdministrativePassword>1d0f03a35f062ba39e024b20aabf2bce8a03</AdministrativePassword>
  </ServerInstance>
</WebConfig>
```

- 6 Replace the information in this section, using the following example as a guide.

```
<WebConfig>
  <ServerInstance>
    <AdministrativeLogin>Siebel Analytics Admin User</AdministrativeLogin>
    <AdministrativePassword>Replace with the encrypted string that you obtained in the steps above</AdministrativePassword>
  </ServerInstance>
</WebConfig>
```

- 7 Make sure that you remove any blank spaces or new lines at the end of the encrypted password string. Your Login and Password information is similar to the following example:

```
<AdministrativeLogin>SADMIN</AdministrativeLogin>
<AdministrativePassword>2fdsjh344..... </AdministrativePassword>
```

- 8 Save the instanceconfig.xml file and exit.
- 9 Restart the Siebel Analytics Web service.

Testing the Administrative User Setup

For additional information about creating segments, see *Siebel Marketing User Guide*. For more information about the Manage Marketing Jobs feature, see [“Managing Marketing Jobs” on page 42](#).

- Log in Siebel Analytics as a non-administrator user.
- Create a simple segment, cache the criteria block, and Run Update counts.
- The operation should execute successfully.

- Check the NQQuery.log file for a POPULATE statement that is populating the M_C_<target level> table.
- Log in Siebel Analytics as an administrator and click the Admin link.
- Click Manage Marketing Jobs.
- In the Database Cache section, verify that there is an entry for the criteria block that you cached.
- Click Purge for that entry.
- After approximately five minutes, check the log file for the execution of an appropriate DELETE statement. Verify that this statement is similar in syntax to the statement in the Administration Tool in the Cache Information tab of the primary QLI.

Enable Sampling for the Target Level

To set up sampling for a given target level, you must copy the relevant tables and map the copied tables into the metadata. Use the guidelines in the following topics:

- [Create the Underlying Physical Sampling Tables on page 165](#)
- [Map the Sample Tables into the Marketing Metadata on page 165](#)

Create the Underlying Physical Sampling Tables

The first step is to create the underlying physical tables. This step must be completed by an administrator.

- First identify the desired target level and sampling factor.
- Generate DDLs for all physical dimension and fact tables to be sampled.
- Rename the physical table and index names to include the target level and sampling factor. For example, if the original table name was W_PERSON_D. A sampled table name for a 1 percent sample of Contacts could be M_C1_PERSON_D.
- Populate M_C1_PERSON_D with 1 percent of W_PERSON_D.
- Set up the join relationship between the sample contact table and the remaining sampled tables. For example, to populate a campaign history sample table, you would include fact records that join to the sample contact table.

Map the Sample Tables into the Marketing Metadata

After you create and populate the sample tables, you can map them into the Marketing Metadata. Sampling works by using dynamic table names. If a base table such as W_PERSON_D is sampled, the physical table object uses a dynamic name that is based on a session variable. At run-time, depending on the selected sampling factor, the value of the session variable is set to the physical sample table. This causes the Analytics Server to generate the physical SQL against the sampled table (not against the original base table).

- For each dimension or fact table that you have sampled, create a corresponding session variable. For example, if you sampled W_PERSON_D, you need a session variable named SAMPLE_W_PERSON_D. The initialization block for this variable needs to default the variable value to the original table name, in this case, W_PERSON_D. The same session variable is used across different sampling tables.
- For all sampled tables, find the base physical table object and set the dynamic table name to use the session variables created in the previous step.
- In the Target Level, in the Sampling Tables dialog box, type all the physical sample tables that you created for this target level and sampling factor combination. The Sampled Physical Table Name corresponds to the actual table name in the database. The Repository Table Object corresponds to the table for which you set the dynamic table name. The Factor corresponds to the percentage at which you sampled the table.

Example of How to Map the Sampling Tables into the Marketing Metadata

The example in this topic assumes that the tables needed for obtaining sampled counts on the target level have been created. To correctly map the sampling tables, perform the procedures in this topic in the sequence shown.

To set up session variables for mapping sampling tables to the marketing metadata

- 1 Shut down the Siebel Analytics Server and the Siebel Analytics Web service.
- 2 In the Administration Tool, open your repository.
- 3 Map all the sample tables in the physical layer by performing the following steps:
 - a From the toolbar menu, choose Manage > Variables.
 - b In the left pane, select Initialization Block, and then in the right pane, right-click and choose New Initialization Block.
 - c In the Initialization Block dialog box, type the following information in the appropriate fields:
 - ❑ From the drop-down list under the Name field, choose associate with session variable.
 - ❑ In the text box, the string (SAMPLE in the example) is not a significant value. You can type any string.
 - ❑ In the Connection Pool field, choose the connection pool in which the sample table has been mapped.
- 4 Click the Variables tab, then click New.
- 5 In the Session Variables dialog box, from the Type drop-down list, select Session.
- 6 Check the following check box so that non-administrators can set this variable for sampling:
Enable any user to set the value
- 7 In the Default initializer text box, click the ellipsis button.
- 8 In the Expression Builder dialog box, select the target-level table (the dimensional table that represents the target level).

- 9 Click OK three times, and then close Variable Manager dialog box.

To map sampling tables to the marketing metadata

- 1 In the Physical layer, expand the Physical database in which the target-level table and its samples exist, and then double-click the target-level table name.
- 2 In the Physical Table dialog box, click the Dynamic Name tab.
- 3 Select the Marketing Customer Sample Table variable in the list and perform the following steps.
 - a In the Dynamic Name tab, click Select.
 - b Verify that the read-only field shows the name of the variable, and then click OK.
- 4 From the toolbar menu, choose Manage > Marketing.
- 5 In the Marketing Metadata dialog box, perform the following steps for every sampling table for this target-level table.
 - a In the left pane, click Target Levels, and then in the right pane, double-click Customers. A target level named Customers is preconfigured.
 - b In the Target Level dialog box, click the Sampling Tables tab, and then click Add.
 - c In the Sampling Table dialog box, complete the fields. Some of the fields are described in the following table.

Field	Description
Repository Table Object	Select a target-level table from the list of tables.
Factor	The number that represents the following calculation: $(\# \text{ of rows in the sample table } * 100) / \# \text{ of rows in the Target Level Table}$

- 6 In the Sampling Table dialog box, click OK, and then in the Target Level dialog box, click OK.
- 7 In the Marketing Metadata dialog box, from the Action menu, choose Check Marketing Metadata Consistency.
- 8 In the Siebel Analytics Tool dialog box, click OK, and then close the Marketing Metadata dialog box.
- 9 Click the save icon, and when asked if you want to check global consistency, click Yes.

For information about saving a repository and checking global consistency, see the topic about creating a new Analytics repository file in *Siebel Analytics Server Administration Guide*.

Setting Up Saved Result Sets for Target Levels

Typically, you use saved result sets to study the changing behavior of customers. Results of a segment or a segment tree node can be saved from time to time and analysis can be performed on the remaining and new targets.

Although the saving operation is very similar to caching, the following list explains the differences that apply to saved result sets:

- Saved Result sets are permanent and do not expire.
- Saved Result sets have to be specifically purged.
- The ability to purge is available to all segmentation users, not just the administrator.
- Multiple saved result sets can be created for a segment or segment tree.
- Saved result sets can be specifically used when nesting segments inside another segment or in segment tree reports.

The information in a saved result is stored in a database schema. There is one table that captures the header information in a saved result set, and one table for every target level that stores the Target-Level ID information for each saved result set.

[Table 24](#) contains the information about the saved result set header table.

Table 24. Header Information in a Saved Result Set

Header Field	Description
GUID	Unique identifier to identify the saved result set
PATH	Path name of the segment report in the Siebel Analytics Web Catalog
SR_CUSTOM_LABEL	A user-created text literal for the saved result set
PRIORITY	Node priority
NODE_PATH	
NODE_LABEL	
TARGET_LEVEL	Name of the target level for which the saved result is being created
CREATED_BY	Login ID of the user who created the saved result set
COUNT	Number of target level IDs in the Saved result set
DATE_TIME	Date and Time when the Saved result set was created
SR_PATH	Refers to the Saved result set list format that was used
CONNECTION_POOL	Connection pool that was used to write the saved result set

Table 25 contains the header information about the Target-Level ID for each saved result set.

Table 25. Target-Level ID information for Each Saved Result Set

Header Field	Description
GUID	Unique identifier of the saved result set. This is the same as that in the header table
TARGET_LEVEL_ID	Column that stores the target level IDs that qualified for this saved result set
OFFER_CODE	Standard attributes
CHANNEL	
VALUE	
CONTROL_CODE	
REGION	
SEGMENT	
TAG_01 .. TAG_15	Extra columns to hold custom attributes or columns

Use this information to help you understand and maintain the Marketing Server saved result sets. Repeat the following topics in this section for every target level that needs to be enabled for saved segment results:

- [Managing Saved Result Sets on page 169](#)
- [About Marketing SQL Files and Saved Result Sets on page 169](#)
- [Guidelines for Creating Saved Result Set Tables in the Database on page 170](#)
- [Mapping and Joining Saved Result Tables on page 170](#)
- [Associate Mapping with a Target Level on page 174](#)

Managing Saved Result Sets

If you purchased the Siebel Data Warehouse version 7.7.1, the data warehouse tables have been preconfigured and appropriately modeled in the Administration Tool. Use this topic to support users, troubleshoot issues, and maintain the saved result set tables. Perform the steps outlined in this topic if you create new target levels that were not preconfigured with the product.

About Marketing SQL Files and Saved Result Sets

In the Siebel Analytics install directory, there is a directory named schema. This directory contains the preconfigured Marketing SQL files: MKTG.DB2.sql, MKTG.MSSQL.sql, and MKTG.Oracle.sql.

These files contain the DDL (data definition language) statements for creating the cache and the saved result set tables. Depending on the database that you use for segmentation, the appropriate file is opened and the DDL statements is executed against the database. For more information about the SQL files and cache, see [“About Marketing SQL Files and Cache” on page 161](#).

Guidelines for Creating Saved Result Set Tables in the Database

The following guidelines apply to using the Marketing SQL files with saved result sets:

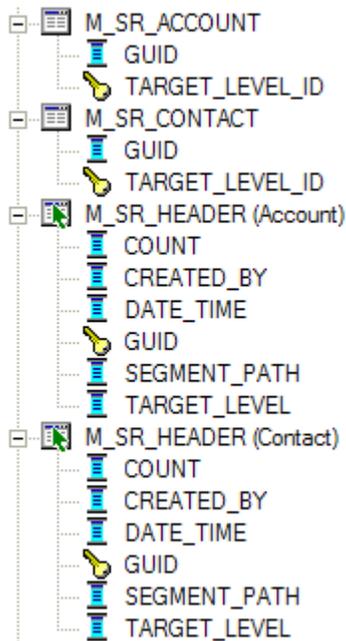
- Make sure that the statements are syntactically correct for the version of the database that is being used. For example, the MKTG.DB2.sql file might not contain the appropriate syntax for the specific version of DB2 that is being used.
- Do NOT modify the name of the result Set header table and its columns. Do not change the data type of the columns unless absolutely necessary.
- Make sure that the data types of the TARGET_LEVEL_ID column matches the data type of the target level. For example, if a cache table is being created for the target-level Household and the Household ID in the database is of type INT, then the TARGET_LEVEL_ID must be of the same type.
- For every target level a separate table needs to be created. The naming convention for the table is M_SR_<target level>. Although the cache table can be named with any name that is database supported, for the purposes of the following discussion the existing naming convention is assumed.
- Do not change the name and type of the GUID column.
- Execute the statement that relates to creating the Saved Result header and the saved result set table and the corresponding index.

Mapping and Joining Saved Result Tables

Use this topic to map saved result tables and join them to target-level dimension tables.

To map saved result tables and join the tables to target-level dimension tables

- 1 In the Siebel Administration Tool, in the Physical Layer, map the header table and the result set table using the following illustration as a guide.

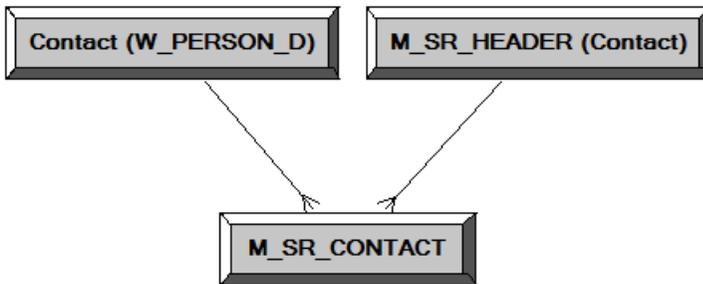


- a Create an Alias of the header table. There must be one alias for each target level.
In the illustration, the tables M_SR_HEADER (Account) and M_SR_HEADER (Contact) are examples of this type of alias.
- b When naming the alias table, use the following naming convention:
M_SR_HEADER < *target level* >

2 Join the tables in the Physical Layer using the following formats:

Join 1: <target level Table>.<Unique ID>=M_SR_<target level>.TARGET_LEVEL_ID

Join 2: M_SR_HEADER (Target Level).GUID=M_SR_<target level>.GUID



Using the previous illustration as a guide, replace the values in the example with the values in the following list:

- Contact (W_PERSON_D) with the Target Level table
- M_SR_HEADER (Contact) with M_SR_HEADER <target level> alias
- M_SR_CONTACT with M_SR_<target level> table.

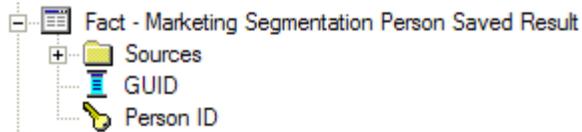
3 Create a business model using the following guidelines:

- a Map the M_SR_HEADER (Target Level) table as a Logical Dimension Marketing - <target level> Saved Result Header. Use the following illustration as a guide.

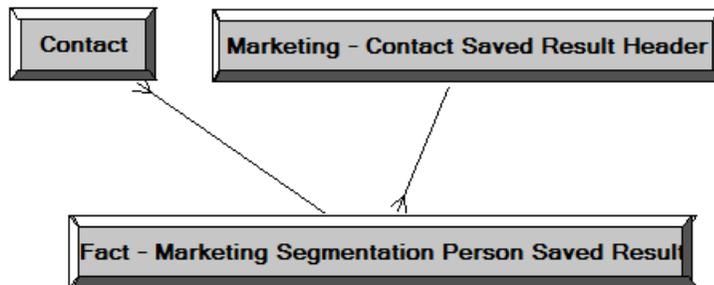


- b Map the M_SR_(Target Level) table as a Logical Fact using the following illustration as a guide, and then name your table using the following convention:

Fact - Marketing Segmentation <target level> Saved Result

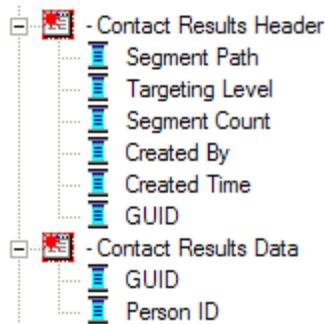


- c Create Logical Joins in the Business model layer, using the following illustration as a guide.



- Replace Contact (logical dimension table) with the logical dimension table name of your target level.
- Replace Marketing - Contact Saved Result Header with your Marketing <target level> Saved Result Header logical dimension table name.
- Replace Fact - Marketing Segmentation Person Saved Result with your Fact - Marketing Segmentation <target level> Saved Result Logical Fact table name.

- 4 Create a presentation catalog and folders using the following illustration as a guide. The cache presentation catalog and the saved result presentation catalog can be the same catalog.



Rename the presentation folders, replacing Contact with your target level name. The following list explains the way you create your catalog and folders:

- Replace Contact Results Header with *<your target level>* Results Header.
 - Replace Contact Results Data with *<your target level>* Results Data.
(*<your target level>* Results Data contains columns from the Fact table.)
- 5 Check Global Consistency, resolve any issues, and save your repository before continuing.

Associate Mapping with a Target Level

Follow the guidelines in this topic to associate mapping with a target level.

- 1 In the Administration Tool, from the Manage menu, select Marketing.
- 2 In the left pane, select Target Levels and double-click the target level for which you want to enable Saved Result Sets.
- 3 In the Target Level dialog box, click the Saved Result Sets tab, and click the ellipsis button.
- 4 In the Presentation Layer section, complete the following information:
 - a Saved Result Catalog. Select the presentation catalog created in [Step 4 on page 174](#).
 - b GUID Column. Select the GUID presentation column as shown in [Step 4 on page 174](#).
This is the GUID column in the *<target level>* Results Data folder.
CAUTION: Do not select the GUID column from the *<target level>* Results Header folder.
 - c Target Id Column. Select the Target Level ID or a corresponding column from the *<target level>* Results Data folder.
- 5 In the Physical Layer section of this dialog box the following information is automatically populated:
 - a Physical Table Name. This is the name of the physical table that stores the result set for that target level. Verify that it is M_SR_*<target level>*.

- b Connection Pool. This is the connection pool in which M_SR_<target level> was mapped.
- 6 Click Default SQL statements. The following information is automatically populated.
 - a Physical SQL to insert the Saved Result Header.

This is the SQL that the Marketing Server uses when a user tries to save a result set. The @... variables is substituted by the Marketing Server.
 - b Physical SQL to delete the saved result set header.

When a user Purges a Saved result set this SQL is issued to delete the header information.
 - c Physical SQL to delete the saved result data set.

When a user Purges a Saved result set this SQL is issued to delete the header information.
- 7 Verify the column names in the SQL statements and test these SQL statements by executing against the database to make sure the syntax is correct.

These table names might need to be fully qualified, depending on the database syntax.

Setting Up the Marketing List Catalogs

Setting up list catalogs is very similar to setting up any presentation catalog. A List catalog is used to generate a list of data at the target level. Lists are generated from a user interface (similar to Siebel Answers) that issues queries against the Siebel Analytics Server.

Customers who purchase the Siebel Data Warehouse version 7.7.1 that contains Siebel Analytics metadata might find that for each of the target levels (Accounts and Contacts) one business model has been created. The following subject areas for list generation are preconfigured for your use:

- **Marketing Account List.** Based on Marketing Account List Business model this catalog is used for List output generation at the Account target level.
- **Marketing Contact List.** Based on Marketing Contact List Business model this catalog is used for List output generation at the Contact target level.
- **Campaign Load - Accounts.** Based on Marketing Account List Business model this catalog is used for generation of data used by the Siebel EAI Campaign load process for the Account Target Level.
- **Campaign Load - Contacts.** Based on Marketing Contact List Business model this catalog is used for generation of data used by the Siebel EAI Campaign load process for the Contact Target Level.
- **Campaign Load - Prospects.** Based on Marketing Contact List Business model this catalog is used for generation of data used by the Siebel EAI Campaign load process for the Prospect Data only.

These topics contain guidelines that you must apply when creating a Business Model in the Administration Tool for a list catalog. Marketers have similar requirements when it comes to list generation. Therefore, this topic contains the following topics for you to use as guidelines when setting up your list catalogs:

- [Gather a List of Facts and Dimensions on page 176](#)

- Define the Logical Fact on page 176
- Including Fact Information in List Reports on page 177
- Business Models Extended for List Generation on page 177
- Setting Up Cross-Database Joins on page 178
- Multiple Addresses for Individuals or Accounts on page 178

Gather a List of Facts and Dimensions

Gather the list of facts and dimensions that need to be used for the generation of the List. For every dimension, identify the fact that relates this dimension to the target level Dimension. When this dimension is mapped as a logical dimension in the Administration Tool, this fact is included in the logical table source as a join. Not doing so may result in ambiguous queries and incorrect list results.

Define the Logical Fact

The logical fact of this business model is usually non-restrictive but needs to be defined. In most business models, including the ones that are used for segmentation catalogs, the *<target level>* logical tables are mapped as dimensions. Therefore, these business models might not be used for generating lists. You must create new business models. This topic explains how to create these business models.

Logical dimensions are joined to a logical fact table, as shown in [Figure 7](#).

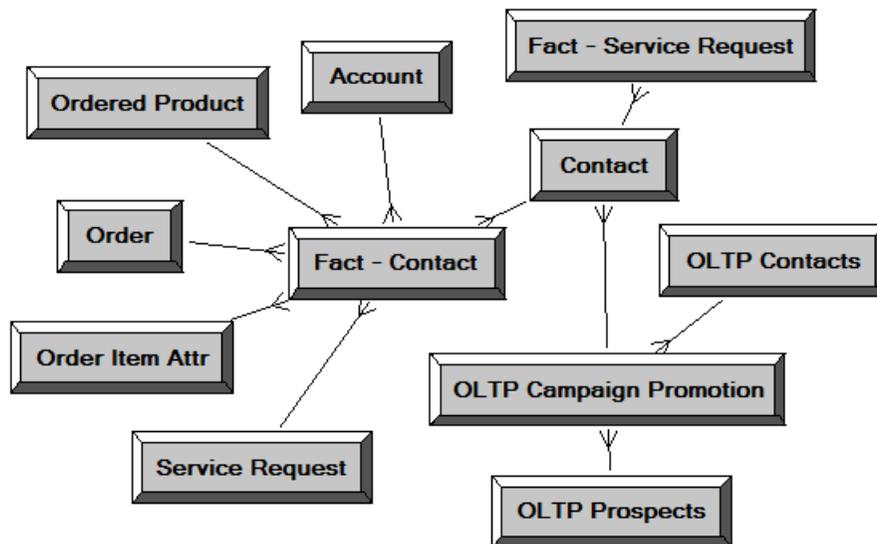


Figure 7. Example Logical Dimensions Joined to a Logical Fact Table

Including Fact Information in List Reports

If fact information needs to be included in the list reports, then each dimension needs to be mapped as dimension hierarchy. This is done because facts usually must be reported at the target level and not any other level. For example, if a list report contains the target level ID column such as Contact ID, Asset Name Column and a fact such as Total Value of Assets, then usually marketers require that the Total Value of Assets be reported at the Contact Level and not for every asset.

In [Figure 8](#), the Service Request fact is included in the business model but needs to be reported at only the Contact level and not the Account dimension. Therefore, a Service Request related facts have been set at the All level of the Account Dimension. The Siebel Analytics Server reads this information and interprets that there is no detail service request information in the database for Accounts and as a result, issues a physical SQL query for service requests that does not include Accounts.

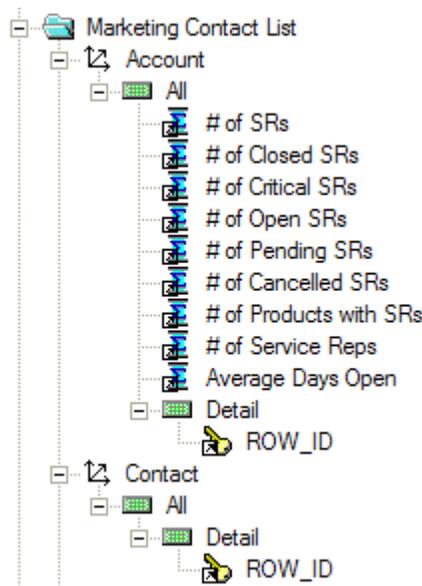


Figure 8. Example of Service Request Fact Reported at the Contact Level

Business Models Extended for List Generation

Customers who have purchased the Siebel Marketing product line and who own the Siebel-provided List business models, have business models that have been extended to make sure that list generation occurs from contact information that resides in the Siebel transactional database. This is needed when marketers have added or deleted contacts manually after a campaign is loaded in the campaign contact table. When this happens, the list of target level IDs (contacts) as provided by the segment or segment tree, do not match what is in the campaign load. As a result, the output list needs to be generated from the Siebel transactional database campaign promotions table.

In the Siebel data model, this table is the S_CAMP_CON table (OLTP Campaign Promotion). [Figure 9 on page 178](#) illustrates the following:

- The OLTP Campaign Promotion (S_CAMP_CON) table is snowflaked between the OLTP Contacts (S_CONTACT) table and the Contact (W_PERSON_D) table.

- The OLTP Campaign Promotion (S_CAMP_CON) table is also snowflaked between the OLTP Prospects (S_PRSP_CONTACT) table and the Contact (W_PERSON_D) table.

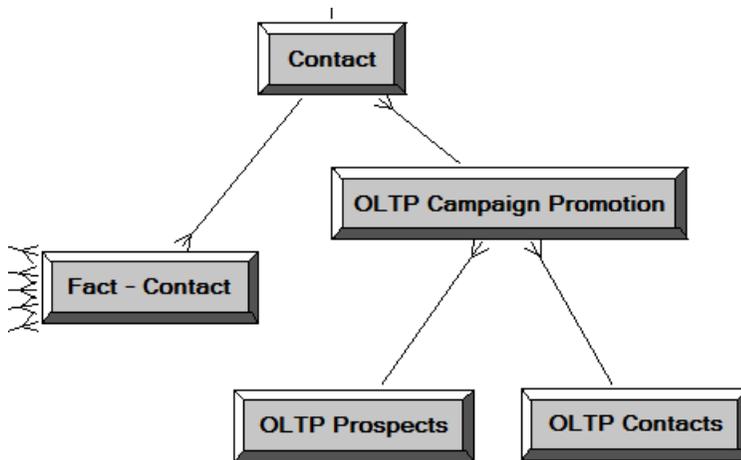


Figure 9. Example

Setting Up Cross-Database Joins

If list information needs to be generated from the Data Warehouse for the contacts in the Siebel transactional database Campaign history table (S_CAMP_CON), a cross-database join needs to be created. Siebel Analytics supports this type of cross-database join.

To set up a cross-database join

- 1 In the Administration Tool, in the Physical Layer, select the Siebel transactional database Campaign History Table and the target level dimension table in the Data Warehouse.
- 2 Right-click and choose Physical Diagram, and then Selected objects only.
- 3 Create a Physical Join using the following syntax:

```
<target level dimension>.<unique Id> = <Siebel transactional database Campaign History Table S_CAMP_CON>.<Key 01/02.../07>
```

For more information about which Key column to pick, see [Chapter 4, "Designing Marketing List Formats."](#)

Multiple Addresses for Individuals or Accounts

When Individuals or Accounts have many addresses, the addresses are stored in a separate table. However, depending on the channel you use for targeting, email address might be more relevant than postal address.

When a list is generated, an inner join with the address table might result in fewer contacts because some do not have address information. To prevent this from happening, by default the S_Contact table in the Siebel transactional database has a left outer join to the address table. A left outer join is used so that contacts with no addresses can be listed. Figure 10 is an example of a logical table source for the S_Contact table.

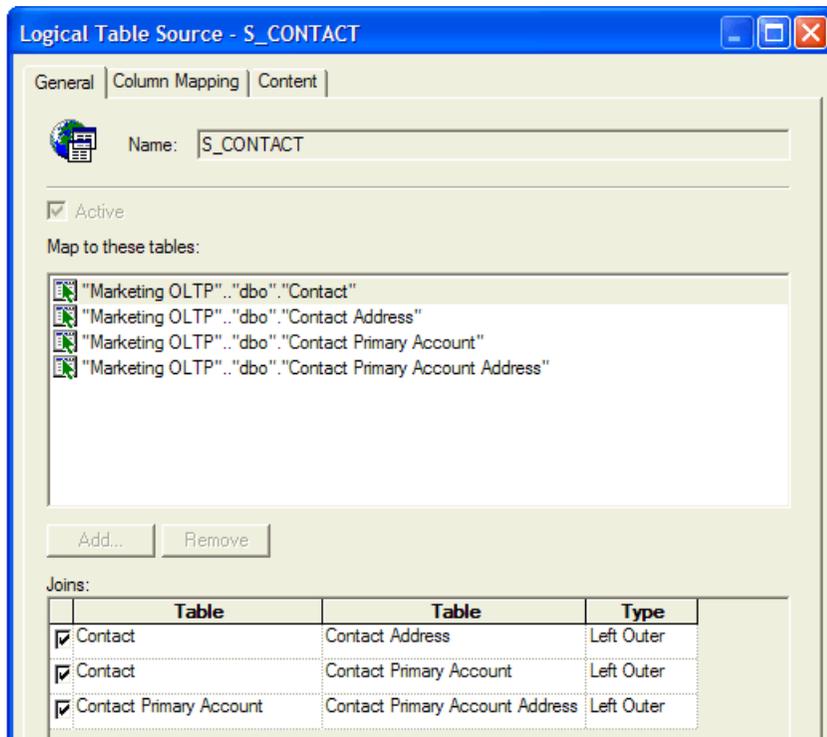


Figure 10. Example of Logical Table Source for S_Contact Table

Setting Up Conforming Dimension Links

Conforming dimensions can be used when a star might include a dimension with the target-level ID. A conforming dimension links a fact that contains target-level IDs to a fact that does not contain target-level IDs by navigating along a dimension that is shared by both fact tables.

Conforming dimensions can be chained. For example, the Siebel Data Warehouse might have an Offer-Product Star schema. To segment individuals who are offered a particular product, you must set up the following two conforming dimension links:

- A conforming dimension link from the Contact-Account fact to the Targeted Campaign fact in which Contact is the common dimension.
- A conforming dimension link from the Targeted Campaign fact to Offer-Product fact in which Campaign is the common dimension.

The marketing module reads these links and identifies the campaigns that included the products that were offered and then identifies all the contacts that were targeted in those campaigns.

To setup conforming dimension links

- 1 Open the repository and in the menu bar, click Manage and choose Marketing.
- 2 In the Marketing Metadata dialog box, in the left pane, click Conforming Dimensions Link.
- 3 In the right pane, right-click, and choose New Conforming Dimension Link.
- 4 In the Conforming Dimension Link dialog box, complete the name field.
- 5 Click the From Catalog ellipsis button to select the From catalog.
- 6 Click the To Catalog ellipsis button to select the To catalog.
- 7 Click the Key ellipsis button to select the presentation column that represents the primary key of the dimension that is common to the From Catalog and the To Catalog.

To duplicate a conforming dimension link

- 1 Open the repository and in the menu bar, click Manage and choose Marketing.
- 2 In the Marketing Metadata dialog box, in the left pane, click Conforming Dimensions Links.
- 3 In the right pane, right-click a conforming dimension link and choose Duplicate.
- 4 In the Conforming Dimension Link dialog box, change the existing values.

Because one conforming dimension link cannot share the same values as another conforming dimension link, you must select new values. If you do not change the values, an error message appears and you are not able to save the copy.

Conforming Dimensions Example

A bank might track service requests at bank-account level and not the contact level. In this example, there is an intersection fact that identifies the contacts that belong to each account (Contact-Account) and another fact table that tracks the service histories of the service requests on the accounts. The bank needs to perform the following mappings:

- The From catalog is the catalog that is mapped to the Contact-Account fact.
- The To catalog is the catalog mapped to the service request fact.
- The From and To keys mapped to the presentation column for Account-Id in the respective catalogs.

Setting Up Marketing Qualified List Items

A qualified list item is an entity that is evaluated against segment criteria so that the information related to that entity can be exported in a list file. The following are categories of qualified list items:

Sometimes Marketers want to limit the list of attribute values in the list output using segmentation logic. Although this could be accomplished in many ways, some of the simpler aspects of this complex task can be accomplished using the secondary QLI feature.

- **Primary qualified list item.** Used in the segmentation process and the list generation process. To count a target level across segmentation catalogs, the Marketing module needs to know the name of the presentation column in each segmentation catalog that uniquely identifies the target-level ID.

For example, if the target level is Consumers, the metadata must indicate the database column that contains the Consumer ID in each catalog. When segmenting Consumers, and using a column that contains Consumer-ID information, each catalog might have a different name. The order segmentation catalog might name the column Consumer-ID and the Asset segmentation catalog might name the same column Cons-ID.

For this reason, you must identify the set of presentation columns across all the segmentation catalogs that refer to the database columns providing the ID for the Marketing Server.

Every target level needs to have a primary qualified list item. A primary qualified list item is an object that represents the target-level entity (for example, Consumer). The definition of the qualified list item has a set of presentation columns from each segmentation catalog named Qualifying Keys. Within every segmentation catalog for a target level, a presentation column that identifies the target level needs to be associated with the primary qualified list item.

When the target-level ID is not available in a segmentation catalog, then there is no column associated with the primary qualified list item. This case is handled by specifying conforming dimensions. For more information about Conforming Dimensions, see *Conforming Dimensions*, below. Each target level must designate a primary qualified list item. The primary qualified list item is used to tell Marketing Server which entity to requalify when pulling a list using this target level.

- **Secondary qualified list item.** Primarily used in the list generation process. Use secondary qualified list items to constrain the contents of a list file based on any segmentation criteria that access the underlying dimension for the object.

For example, you might create a segment targeting customers who have a leased an automobile and the lease expires in the next two months. When generating a list for a direct mail or email campaign, you want to include the customer name and the exact model name of the leased vehicle for which the lease is about to expire.

Without a secondary qualified list item, the list generation query returns all vehicles owned or leased by segments members. To make sure that, when the list gets generated, only the vehicle whose lease is expiring is listed, the list needs to be additionally qualified based on the vehicle used in the segment. The relevant segmentation catalogs that provide the vehicle information and the list catalogs that provide the list must have an additional list item declared. This list item, called the secondary qualified list item, is the set that refers to Vehicle-IDs across list and segmentation catalogs. Adding a secondary qualified list item, qualifies the list output column to be restricted by the values used in the segmentation logic.

Examples of Setting Up Qualified List Items

The following are some examples of when a secondary QLI might be necessary:

- A B2B marketer creates a segment targeting Account for which there is at least one contact at the VP level, Director Level, and CIO level. When the list output is generated for the campaign fulfillment, the marketer wants only those contacts to appear in the list as were specified using the job titles in the segmentation logic, for example, VP, Director, and CIO. If secondary QLI feature is not used then all the contacts for the segmented Accounts are listed.
- A B2C marketer at an automobile company wants to target customers who have leased a vehicle for which the lease expires soon. When generating the list for campaign fulfillment, the marketer wants to personalize the message to include the type of leased vehicle and the lease that is expiring. The secondary QLI feature limits the list to only those vehicles. If the feature is not used, then all vehicles that are owned or leased are listed.
- A B2C marketer at a financial services company wants to target customers whose portfolio value dropped by more than a specific amount and wants to offer financial consultation. As such the marketer wants to personalize the message by including only the specific portfolio account that was used in the segmentation logic. By using the secondary QLI feature the marketer can limit the list output to only the specific portfolio account and not all the accounts that the customer owns.

Setting Up Qualified List Items

These instructions assume that you have created the business model and the subject areas for the list catalogs.

NOTE: Another technique that achieves the same results as setting up qualified list items is using filters in the List output catalog report in Siebel Answers. An advantage of using this alternate technique is that it might be faster and does not require Marketing metadata setup. A disadvantage of using this alternate technique is that too many list format reports might be generated.

- 1 Open the appropriate repository and from the Manage menu, select Marketing.
- 2 In the Marketing Metadata dialog box, in the left pane, select Qualified List Item and perform the following steps:
 - a In the right pane, right-click and select New Qualified List Item.
 - b In the Qualified List Item dialog box, in the General tab, type the name of the secondary QLI and click OK.

NOTE: Generating secondary QLIs can be an expensive database operation. Therefore, secondary QLIs can also be cached. Use the Cache information tab to specify this cache. For every secondary QLI a different cache table needs to be created. These tables must be mapped in a manner similar to other cache tables.

- 3 In the left pane, select Target Levels.
- 4 In the right pane, double-click a target level and perform the following steps:
 - a In the Target Level dialog box, click the Segmentation Catalog Tab.
 - b In the Catalog Name list, double-click the name of the presentation catalog that contains the superset of the secondary QLI.

For example, if Products needs to be qualified, then it is important to know if other products such as Ordered Products or Serviced Products need to be qualified.

- c In the Segmentation Catalog dialog box, click Add.
 - d In the Qualifying Key dialog box, in the Qualified List Item field, click Browse and select the QLI that you created in [Step 2 on page 182](#).
 - e In the Qualifying Key dialog box, in the Column field, specify the presentation column such as Product ID that provide the QLI information and click OK three times.
- 5 In the Marketing Metadata dialog box, in the left pane, select List Catalog and perform the following steps:
- a In the right pane, right-click and add the presentation catalogs to participate in list generation.
 - b For each list catalog used for a secondary QLI, double-click the list catalog and add the secondary QLI that you created.
 - c Click OK.
- 6 In the Marketing Metadata dialog box, from the Action menu, select Check Marketing Metadata Consistency.
- If you modified the repository online, check-in your changes, save, Check Global consistency and exit.
- 7 Test the QLI function by using the Marketing module user interface features.
- For more information, see *Siebel Marketing User Guide* or online help screens in the Marketing Module user interface.

Controlling Marketing Vendor List Query Details

If there are dimensional attributes in your list output report that do not belong to the target level dimension and there is a 1:N relationship between the target level and the Dimensional attribute, special configuration might be needed. For example, if the list output report contains columns such as Contact-ID (target level) and email Address and there is a 1:N relationship between Contacts and Email Addresses, the list output report is similar to [Table 26](#).

Table 26. Example of List Output Report

Contact-ID	Email Address
C1	E1@A1.com
C1	E2@A2.com
C1	E3@A3.com

However, marketing vendor lists often require that only one row be created for every Contact (target level ID). This problem can be solved in the following ways:

- Adding an explicit filter such that only one email address is selected in the list output, such as in the following example:

WHERE <Email-Address Table>. <Type Column> = Primary

- Using a QLI on the Email-Address column. For more information, see [“Setting Up Marketing Qualified List Items” on page 180](#).
- Setting up a simple measure and adding a filter.

For example, set up a simple measure such as RANK (Email-Address) by Contact-ID, and then assign a filter to this measure in the report as WHERE RANK(E...) = 1. This generates a unique number, starting from 1, for every combination of the Contact-ID and E-mail Address columns. The filter selects the first combination, eliminating duplicate rows. The following are the guidelines for setting up a simple measure and adding a filter.

- In the Administration Tool, select the business model for the list output for the target level (for example, Contact).
- Create a logical fact table and a logical column.
- In the Levels tab, select the Detail level for the target level dimension.
- Drag this measure to the List catalog in the Presentation layer, check metadata consistency, and save your work.
- In the Marketing Module, in the List Format Designer, add this column, put a filter equal to 1 and remove the column from the list format.

A

Advanced Marketing Information for Administrators

This appendix contains advanced information for administrators. It includes the following topics:

- [Upgrading Campaigns from Earlier Versions on page 185](#)
- [Field Names for Marketing Integration Components on page 186](#)
- [Displaying Analytics Columns in Marketing Plans on page 195](#)

Upgrading Campaigns from Earlier Versions

Customers upgrading campaigns from any versions prior to 7.7 must review Technical Note 583. This Technical Note is also useful anyone who wants more information on campaigns, waves, and the underlying table information.

Field Names for Marketing Integration Components

Table 27 on page 186 contains a list of Marketing integration objects, their components, and field names.

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Analytics Account	Account	Attribute 66	DTYPE_TEXT	100
		Attribute 67	DTYPE_TEXT	100
		Attribute 68	DTYPE_TEXT	100
		Attribute 69	DTYPE_TEXT	100
		Attribute 70	DTYPE_TEXT	100
		Attribute 71	DTYPE_TEXT	100
		Attribute 72	DTYPE_TEXT	100
		Attribute 73	DTYPE_NUMBER	
		Attribute 74	DTYPE_NUMBER	
		Attribute 75	DTYPE_NUMBER	
		Attribute 76	DTYPE_NUMBER	
		Attribute 77	DTYPE_NUMBER	
		Attribute 78	DTYPE_NUMBER	
		Attribute 79	DTYPE_NUMBER	
Attribute 80	DTYPE_NUMBER			
Analytics Account (continued)	Account (continued)	Attribute 81	DTYPE_NUMBER	
		Id	DTYPE_ID	30
		Integration Id	DTYPE_TEXT	30
		Location	DTYPE_TEXT	50
		Name	DTYPE_TEXT	100

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Analytics Contact	Contact	Attribute 49	DTYPE_TEXT	100
		Attribute 50	DTYPE_TEXT	100
		Attribute 51	DTYPE_TEXT	100
		Attribute 52	DTYPE_TEXT	100
		Attribute 53	DTYPE_TEXT	100
		Attribute 54	DTYPE_TEXT	100
		Attribute 55	DTYPE_TEXT	100
		Attribute 56	DTYPE_NUMBER	
		Attribute 57	DTYPE_NUMBER	
		Attribute 58	DTYPE_NUMBER	
		Attribute 59	DTYPE_NUMBER	
		Attribute 60	DTYPE_NUMBER	
		Attribute 61	DTYPE_NUMBER	
		Attribute 62	DTYPE_NUMBER	
		Attribute 63	DTYPE_NUMBER	
		Attribute 64	DTYPE_NUMBER	
		First Name	DTYPE_TEXT	50
		Id	DTYPE_ID	30
		Integration Id	DTYPE_TEXT	30
Last Name	DTYPE_TEXT	50		
Person UId	DTYPE_TEXT	100		

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Analytics Household	Household	Attribute 48	DTYPE_TEXT	100
		Attribute 49	DTYPE_TEXT	100
		Attribute 50	DTYPE_TEXT	100
		Attribute 51	DTYPE_TEXT	100
		Attribute 52	DTYPE_TEXT	100
		Attribute 53	DTYPE_TEXT	100
		Attribute 54	DTYPE_TEXT	100
		Attribute 55	DTYPE_NUMBER	
		Attribute 56	DTYPE_NUMBER	
		Attribute 57	DTYPE_NUMBER	
		Attribute 58	DTYPE_NUMBER	
		Attribute 59	DTYPE_NUMBER	
		Attribute 60	DTYPE_NUMBER	
		Attribute 61	DTYPE_NUMBER	
		Attribute 62	DTYPE_NUMBER	
		Attribute 63	DTYPE_NUMBER	
		Household Name	DTYPE_TEXT	50
		Household Number	DTYPE_TEXT	100
Id	DTYPE_ID	30		
Integration Id	DTYPE_TEXT	30		
Marketing Contact	Account	Account Location	DTYPE_TEXT	50
		Account Name	DTYPE_TEXT	100
		Home Page	DTYPE_TEXT	100
		Id	DTYPE_TEXT	30
		Integration Id	DTYPE_TEXT	30
		Main Fax Number	DTYPE_TEXT	
		Main Phone Number	DTYPE_TEXT	
		Region	DTYPE_TEXT	25

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Contact (continued)	Account Address	Address Name	DTYPE_TEXT	100
		City	DTYPE_TEXT	50
		Country	DTYPE_TEXT	50
		Id	DTYPE_TEXT	30
		Integration Id	DTYPE_TEXT	30
		Postal Code	DTYPE_TEXT	30
		State	DTYPE_TEXT	10
		Street Address	DTYPE_TEXT	200
		Street Address 2	DTYPE_TEXT	100
	Account Organization	Organization	DTYPE_TEXT	50
	Campaign Contact	Campaign Id	DTYPE_ID	
		Completion Date	DTYPE_TEXT	
		Distribution Id	DTYPE_ID	
		Key 1	DTYPE_TEXT	30
		Key 2	DTYPE_TEXT	30
		Key 3	DTYPE_TEXT	30
		Key 4	DTYPE_TEXT	30
		Key 5	DTYPE_TEXT	30
		Key 6	DTYPE_TEXT	30
		Key 7	DTYPE_TEXT	30
		Load Number	DTYPE_NUMBER	
		Load Wave Id	DTYPE_ID	
		Scalability Batch Number	DTYPE_NUMBER	
Segment Id		DTYPE_ID		
Source Code	DTYPE_TEXT	75		
Token Number	DTYPE_NUMBER			
	Treatment Id	DTYPE_ID		

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Contact (continued)	Contact	Cellular Phone #	DTYPE_TEXT	
		Email Address	DTYPE_TEXT	50
		Fax Phone #	DTYPE_TEXT	
		First Name	DTYPE_TEXT	50
		Gender	DTYPE_TEXT	30
		Home Phone #	DTYPE_TEXT	
		Id	DTYPE_ID	30
		Integration Id	DTYPE_TEXT	30
		Job Title	DTYPE_TEXT	75
		Last Name	DTYPE_TEXT	50
		Middle Name	DTYPE_TEXT	50
		Person UId	DTYPE_TEXT	100
		Preferred Communications	DTYPE_TEXT	30
		Salutation	DTYPE_TEXT	15
		Status	DTYPE_TEXT	30
	Work Phone #	DTYPE_TEXT		
	Contact Address	Id	DTYPE_TEXT	30
		Integration Id	DTYPE_TEXT	30
		Personal Address Name	DTYPE_TEXT	100
		Personal City	DTYPE_TEXT	50
		Personal Country	DTYPE_TEXT	50
		Personal Postal Code	DTYPE_TEXT	30
		Personal State	DTYPE_TEXT	10
		Personal Street Address	DTYPE_TEXT	200
	Personal Street Address 2	DTYPE_TEXT	100	
Contact Organization	Organization	DTYPE_TEXT	50	

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Contact (continued)	Household	Fax Number	DTYPE_TEXT	
		Household Name	DTYPE_TEXT	50
		Household Number	DTYPE_TEXT	100
		Household Size	DTYPE_NUMBER	
		Household Wealth	DTYPE_TEXT	
		Id	DTYPE_ID	30
		Income	DTYPE_TEXT	
		Integration Id	DTYPE_TEXT	30
		Phone Number	DTYPE_TEXT	
		Revenue	DTYPE_TEXT	
		Household Organization	Organization	DTYPE_TEXT

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Person	Campaign Contact	Account Id	DTYPE_ID	
		Campaign Id	DTYPE_ID	
		Completion Date	DTYPE_TEXT	
		Contact Id	DTYPE_ID	
		Distribution Id	DTYPE_ID	
		Household Id	DTYPE_ID	
		Key 1	DTYPE_TEXT	30
		Key 2	DTYPE_TEXT	30
		Key 3	DTYPE_TEXT	30
		Key 4	DTYPE_TEXT	30
		Key 5	DTYPE_TEXT	30
		Key 6	DTYPE_TEXT	30
		Key 7	DTYPE_TEXT	30
		Load Number	DTYPE_NUMBER	
		Load Wave Id	DTYPE_ID	
		Prospect Id	DTYPE_ID	
		Scalability Batch Number	DTYPE_NUMBER	
		Segment Id	DTYPE_ID	
		Source Code	DTYPE_TEXT	75
Treatment Id	DTYPE_ID			
Token Number	DTYPE_NUMBER			

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length	
Marketing Prospect	Campaign Contact	Call Completed	DTYPE_TEXT		
		Campaign Id	DTYPE_ID		
		Completion Date	DTYPE_TEXT		
		Distribution Id	DTYPE_ID		
		Key 1	DTYPE_TEXT	30	
		Key 2	DTYPE_TEXT	30	
		Key 3	DTYPE_TEXT	30	
		Key 4	DTYPE_TEXT	30	
		Key 5	DTYPE_TEXT	30	
		Key 6	DTYPE_TEXT	30	
		Key 7	DTYPE_TEXT	30	
		Load Number	DTYPE_NUMBER		
		Load Wave Id	DTYPE_ID		
		Prospect Id	DTYPE_ID		
		Scalability Batch Number	DTYPE_NUMBER		
		Segment Id	DTYPE_ID		
	Treatment Id	DTYPE_ID			
	Token Number	DTYPE_NUMBER			
		Prospect	Account	DTYPE_TEXT	
			Account Id	DTYPE_ID	
			Alias	DTYPE_TEXT	
			Alternate Phone #	DTYPE_TEXT	
			Annual Revenue	DTYPE_NUMBER	
			Assistant	DTYPE_TEXT	
			Assistant Phone #	DTYPE_TEXT	
			Birth Date	DTYPE_DATETIME	
			Cellular Phone #	DTYPE_TEXT	
	City		DTYPE_TEXT		
	Comment		DTYPE_TEXT		
	Country	DTYPE_TEXT			

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Prospect (continued)	Prospect (continued)	County	DTYPE_TEXT	
		Disable DataCleansing	DTYPE_TEXT	
		DUNS Number	DTYPE_ID	
		Email Address	DTYPE_TEXT	
		Employee At Site	DTYPE_NUMBER	
		Employee Total	DTYPE_NUMBER	
		Expiration Date	DTYPE_TEXT	
		Fax Phone #	DTYPE_TEXT	
		First Name	DTYPE_TEXT	
		Gender	DTYPE_TEXT	30
		Hide DUNS Number Flag	DTYPE_TEXT	
		Home Page	DTYPE_TEXT	100
		Home Phone #	DTYPE_TEXT	
		Id	DTYPE_ID	30
		Job Title	DTYPE_TEXT	
		Last Name	DTYPE_TEXT	
		Line of Business	DTYPE_TEXT	50
		Maiden Name	DTYPE_TEXT	
		Manager Name	DTYPE_TEXT	
		Marital Status Code	DTYPE_TEXT	
		Middle Name	DTYPE_TEXT	
		Nationality	DTYPE_TEXT	
		Postal Code	DTYPE_TEXT	
		Preferred Communications	DTYPE_TEXT	30
Preferred Language Name	DTYPE_TEXT			
Primary Account Location	DTYPE_TEXT			
Primary SIC Code	DTYPE_TEXT	30		

Table 27. Field Names for Marketing Integration Components

Parent Integration Object	Parent Integration Component	Name	Data Type	Length
Marketing Prospect (continued)	Prospect (continued)	Primary SIC Id	DTYPE_ID	
		Product Interest	DTYPE_TEXT	100
		Prospective Contact UId	DTYPE_TEXT	100
		Province	DTYPE_TEXT	
		Public	DTYPE_TEXT	1
		Race	DTYPE_TEXT	
		Salutation	DTYPE_TEXT	
		Social Security Number	DTYPE_TEXT	
		Source Name	DTYPE_TEXT	100
		State	DTYPE_TEXT	
		Street Address	DTYPE_TEXT	
		Street Address 2	DTYPE_TEXT	
		Suppress Call Flag	DTYPE_TEXT	
		Suppress Email Flag	DTYPE_TEXT	
		Suppress Fax Flag	DTYPE_TEXT	
		Suppress Mail Flag	DTYPE_TEXT	
		Time Zone	DTYPE_TEXT	
Work Phone #	DTYPE_TEXT			
Year Started	DTYPE_NUMBER			

Displaying Analytics Columns in Marketing Plans

To display values from a Siebel Analytics column in the Marketing Plans screen, you can create an external table object in Siebel Tools. This external table object contains a logical column and logical join so that you can retrieve an external column value from Siebel Analytics.

You can display Analytics columns in Marketing plans in the following ways:

- [Displaying Analytics Columns in Marketing Plans By Exporting Schema on page 196](#). A best practice is to use this method.

- [Displaying Analytics Columns in Marketing Plans Using Siebel Tools on page 196](#). If you need to set up this feature manually, use this method.

Displaying Analytics Columns in Marketing Plans By Exporting Schema

Siebel Marketing supports the ability to display the value of any Analytics column as a field in a form or list applet. The standard version of Siebel Analytics uses this capability to calculate actual revenue for a marketing plan.

Use the Siebel Analytics Administration Tool to export the corresponding schema, create an XML file (table) from the exported schema information, and import the XML file back into the Physical layer of the Administration Tool as an XML data source. For more information about exporting schemas and importing data sources, see *Siebel Analytics Server Administration Guide*.

Alternatively, you can display values from a Siebel Analytics column by creating an external table object in Siebel Tools. This external table object contains a logical column and logical join so that you can retrieve an external column value from Siebel Analytics.

Displaying Analytics Columns in Marketing Plans Using Siebel Tools

If you need to set up this feature manually, perform the following steps:

- [Example of Creating an External Table Object in Siebel Tools on page 196](#)
- [Set Up Columns for the Table Object in Siebel Tools on page 197](#)
- [Assign the Column Names for the Table Object on page 197](#)
- [Create a Data Source for the Table Object on page 197](#)

Example of Creating an External Table Object in Siebel Tools

Use this example as a guide when you want to set up the Actual Order Revenue for Marketing Plan to be displayed in the Marketing Plans business component.

NOTE: This example can be used to display Analytics column values in other marketing business components such as campaigns by using the applicable business component name and appropriate table names.

- In Oracle's Siebel Tools, from the menu bar, choose Table and then click New.
- Select an appropriate name.
The letters *EX* at the beginning of the name, identifies it as an external object.
- Select the project.

The User Name field ideally is Name of Table. This adds the EXT suffix. (Recommended convention)

- Alias is the Name of the Presentation Catalog. (Enclose in quotes.)
- Set Type to External.
- Set Status to Active.

Set Up Columns for the Table Object in Siebel Tools

- Click Columns.
- (Optional, recommended convention) Copy the Name value into the User Name column.
- For each new column, enter the Alias as the Column Path, enclosed in quotes as shown in the following example:

`"<Fact Table Name>". "<Column Name/Alias>"`

- Set the Type field to External.
- Set the Nullable flag, if required.
- For each column, add the Physical Type and Length.
- If applicable, add the Precision and Scale for numeric columns.
- Set Cascade Clear to Ignore.
- Set Transaction Log Code to True.
- Set Status to Active.
- Set System Field Mapping to Id only if the corresponding column is a Row Id (used by Object Manager to make queries).

Assign the Column Names for the Table Object

- Change the Name column to EX_MPL_REVENUE. (The name of the table.)
- Copy the Name value into the User Name column. (It adds Ext to the user name.)
- Enclose the Alias ("Marketing Plans") in double quotation marks.
- Change the Name of 1 column to MARKETING_PLAN_ID and perform the following steps:
 - Copy the Name into User Name.
 - Set the System Field Mapping attribute to Id.
- Change Name of 2 Column to TOTAL_ORDER_REVENUE, and then copy the Name into the User Name column.

Create a Data Source for the Table Object

- In the Object Explorer, go to Data Source.
- Create a New record and in the Name field, enter Analytics Web.
- The Name is the name of the DSN that you use to connect to Siebel Analytics Server.

- Update the Join for the Marketing Plans business component.
- In the Object Explorer, select Business Components.
- Query for business component Marketing Plans.
- Expand the explorer to display the Joins folder.
- Go to Join EX_MKT_REVENUE. Replace it with EX_MPL_REVENUE. Change the Table alias to EX_MPL_REVENUE.
- The Join specification > Destination column should be MARKETING_PLAN_ID.
- Go to Field > Actual Revenue. Change Join to EX_MPL_REVENUE. Change Column to TOTAL_ORDER_REVENUE.

B

Assigning Character Sets for the Email Marketing Server

This appendix describes how to assign character sets for the Email Marketing Server. It includes the following topic:

- [Working with Character Sets for Email Marketing Servers on page 199](#)

Working with Character Sets for Email Marketing Servers

To change the character set used for outbound emails, add a parameter to the Email Marketing Server profile that is used for the outbound email campaign. The parameter you must add or change is Character Set, using a value from the right column of [Table 28](#).

When the Communications Server processes an email request for a campaign, it identifies the character set and locale of the first offer, changes to that offer's character set and locale, and processes that offer and associated offers using that character set and locale.

To assign the character set for the Email Marketing Server configuration, perform the actions in the following list:

- 1 Navigate to the Administration - Marketing screen > Servers view.
- 2 Query for records of type Email Marketing Server.
- 3 Select an email server and add a new parameter type with the name Charset.
- 4 Set the parameter value to the value of the character set with which to send the email offer.

NOTE: Make sure that your email templates use the same character set and encoding as the Marketing Server operating system uses.

[Table 28](#) identifies the name of the character set used in an email campaign.

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP10004	Arabic	Macintosh Arabic	Microsoft / IBM	CP10004
CP1256	Arabic		Microsoft / IBM	CP1256
CP20420	Arabic	(With full-width Latin and punctuation)	Microsoft / IBM	CP20420
CP28596	Arabic	Arabic Alphabet (ISO)	Microsoft / IBM	CP28596

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP720	Arabic	Transparent ASMO	Microsoft / IBM	CP720
CP864	Arabic		Microsoft / IBM	CP864
ISO 8859-6	Arabic	ISOLatinArabic	International or National Standard	Arabic
CP708	Arabic	ASMO708	Microsoft / IBM	CP708
CP1257	Baltic		Microsoft / IBM	CP1257
CP28594	Baltic	Baltic Alphabet (ISO)	Microsoft / IBM	CP28594
CP775	Baltic		Microsoft / IBM	CP775
ISO 8859-4	Baltic	Latin4	International or National Standard	Latin4, ISO-8859-4
ISO 8859-13	Baltic	Latin7	International or National Standard	Latin7, ISO-8859-13
ISO 8859-14	Celtic	Latin8	International or National Standard	ISO-8859-14
CCSID 935	Chinese, Simplified		IBM	CCSID-935, CCSID935
EUC-CN	Chinese, Simplified	GB2312, EUC-SC	UNIX	GB2312
GB2312	Chinese, Simplified	EUC-CN, EUC-SC	International or National Standard	GB2312
HZ-GB-2312	Chinese, Simplified	HZ-GB-2312	International or National Standard	HZ, HZ-GB-2312
CP936	Chinese, Simplified	GBK	Microsoft / IBM	CP936, GBK
MacChinese Simplified	Chinese, Simplified		Macintosh	MacChinese Simplified
CCSID 937	Chinese, Traditional		IBM	CCSID-937, CCSID937
CNS-11643-1986	Chinese, Traditional	EUC-TW	International or National Standard	CNS-11643-1986
CNS-11643-1992	Chinese, Traditional	EUC-TW	International or National Standard	CNS-11643, CNS-11643-1992
EUC-TW	Chinese, Traditional	CNS-11643-1986, CNS-11643-1992	UNIX	CNS-11643, CNS-11643-1992

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
GB12345	Chinese, Traditional		International or National Standard	GB12345
Big5	Chinese, Traditional		International or National Standard	Big5
CP10002	Chinese, Traditional	Macintosh Traditional Chinese	Microsoft / IBM	CP10002
CP950	Chinese, Traditional		Microsoft / IBM	CP950
MacChineseTraditional	Chinese, Traditional		Macintosh	MacChineseTraditional
MacCroatian	Croatian		Macintosh	MacCroatian
CP10007	Cyrillic	Macintosh Cyrillic	Microsoft / IBM	CP10007
CP1251	Cyrillic	MS Windows Cyrillic (Slavic)	Microsoft / IBM	CP1251
CP20866	Cyrillic	Cyrillic Alphabet, KOI8-R	Microsoft / IBM	CP20866
CP20880	Cyrillic	(with full-width Latin and punctuation)	Microsoft / IBM	CP20880
CP21025	Cyrillic	(with full-width Latin and punctuation)	Microsoft / IBM	CP21025
CP21866	Cyrillic	Ukranian KOI8-RU	Microsoft / IBM	CP21866
CP28595	Cyrillic	Cyrillic Alphabet (ISO)	Microsoft / IBM	CP28595
CP855	Cyrillic	IBM Cyrillic	Microsoft / IBM	CP855
CP866	Cyrillic	MS DOS Russian	Microsoft / IBM	CP866
ISO 8859-5	Cyrillic	ISOLatinCyrillic	International or National Standard	ISOLatinCyrillic
MacCyrillic	Cyrillic		Macintosh	MacCyrillic
MacDevanagari	Devanagari		Macintosh	MacDevanagari
CP10006	Greek	Macintosh Greek 1	Microsoft / IBM	CP10006
CP1253	Greek		Microsoft / IBM	CP1253
CP20423	Greek	(with full-width Latin and punctuation)	Microsoft / IBM	CP20423

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP28597	Greek	Greek Alphabet (ISO)	Microsoft / IBM	CP28597
CP737	Greek		Microsoft / IBM	CP737
CP869	Greek	IBM Modern Greek	Microsoft / IBM	CP869
ISO 8859-7	Greek	ISOLatinGreek	International or National Standard	Greek
MacGreek	Greek		Macintosh	MacGreek
MacGujarati	Gujarati		Macintosh	MacGujarati
CP10010	Gurmukhi	Macintosh Gurmukhi	Microsoft / IBM	CP10010
MacGurmukhi	Gurmukhi		Macintosh	MacGurmukhi
CP10005	Hebrew	Macintosh Hebrew	Microsoft / IBM	CP10005
CP1255	Hebrew		Microsoft / IBM	CP1255
CP28598	Hebrew	Hebrew Alphabet (ISO)	Microsoft / IBM	CP28598
CP38598	Hebrew	ASCII + Hebrew and private use characters	Microsoft / IBM	CP38598
CP862	Hebrew		Microsoft / IBM	CP862
ISO 8859-8	Hebrew	ISOLatinHebrew	International or National Standard	Hebrew
CP10079	Icelandic	Macintosh Icelandic	Microsoft / IBM	CP10079
CP861	Icelandic	MS DOS Icelandic	Microsoft / IBM	CP861
MacIcelandic	Icelandic		Macintosh	MacIcelandic
CCSID 1027	Japanese	EBCDIK	Microsoft / IBM	CCSID-1027, CCSID1027
CCSID 290	Japanese	EBCDIK	Microsoft / IBM	CCSID-290, CCSID290
CCSID 930	Japanese		IBM	CCSID-930, CCSID930
CCSID 939	Japanese		IBM	CCSID-939, CCSID939
CCSID 942	Japanese		Microsoft / IBM	CCSID-942, CCSID942
CP10001	Japanese	Macintosh Japanese	Microsoft / IBM	CP10001

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP20290	Japanese	(full/half width Latin and halfwidth katakana)	Microsoft / IBM	CP20290
CP21027	Japanese	(half-width Latin, half-width katakana and private use)	Microsoft / IBM	CP21027
EUC-JP	Japanese		UNIX	EUC-JP, EUC-J
ISO-2022-JP	Japanese		International or National Standard	ISO-2022-JP
JIS_X_0201	Japanese	Half-WidthKatakana	International or National Standard	JIS_X_0201
JIS_X_0208	Japanese		International or National Standard	JIS_X_0208
MacJapanese	Japanese		Macintosh	MacJapanese
Shift-JISMS	Japanese	MS_Kanji, CP932	Microsoft / IBM	Shift-JIS, SJIS
Shift-JIS78	Japanese	Shift-JIS without MS/IBM extensions	UNIX/Macintosh	Shift-JIS78, SJIS78
CP10003	Korean	Macintosh Korean	Microsoft / IBM	CP10003
CP1361	Korean	Korean Johab (based on KSC 5861-1992)	Microsoft / IBM	CP1361
CP949	Korean		Microsoft / IBM	CP949
EUC-KR	Korean	KS_C_5861-1992	UNIX	EUC-KR, EUC-K
ISO-2022-KR	Korean	KS_C_5601-1987	International or National Standard	ISO-2022-KR
Johab	Korean		International or National Standard	Johab
KS_C_5601-1987	Korean	ISO-2022-KR	International or National Standard	ISO-2022-KR
KS_C_5861-1992	Korean	EUC-KR	International or National Standard	KS_C_5861-1992
MacKorean	Korean		Macintosh	MacKorean
CP10000	Latin	Macintosh Roman	Microsoft / IBM	CP10000
CP10029	Latin	Macintosh Latin2	Microsoft / IBM	CP10029

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP10082	Latin	(with mathematical symbols)	Microsoft / IBM	CP10082
CCSID 1047	Latin	EBCDIC (for IBM Open Systems platform)	Microsoft / IBM	CCSID1047
CP20261	Latin	(with private use characters)	Microsoft / IBM	CP20261
CP20269	Latin		Microsoft / IBM	CP20269
CP20273	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20273
CP20277	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20277
CP20278	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20278
CP20280	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20280
CP20284	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20284
CP20285	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20285
CP20297	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20297
CP20833	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20833
CP20871	Latin	(with full-width Latin and punctuation)	Microsoft / IBM	CP20871
CP28591	Latin	ASCII + Latin accented vowels	Microsoft / IBM	CP28591
CP28593	Latin	Latin 3 Alphabet (ISO)	Microsoft / IBM	CP28593
CP850	Latin	MS DOS Multilingual, MS-DOS Latin1	Microsoft / IBM	CP850
CP870	Latin	(with fullwidth punctuation)	Microsoft / IBM	CP870
ISO 8859-1	Latin	Latin1	International or National Standard	Latin1, ISO-8859-1

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
ISO 8859-15	Latin	Latin1 + Euro symbol and accented characters	International or National Standard	ISO-8859-15
ISO 8859-2	Latin	Latin2	International or National Standard	Latin2, ISO-8859-2
MacRoman	Latin		Macintosh	MacRoman
NextStep	Latin		Apple/Next	NextStep
Adobe-Standard-Encoding	Latin	(used in PS printers)	Other Corporate	Adobe-Standard-Encoding
CP863	Latin, Canadian French	MS DOS Canadian French	Microsoft / IBM	CP863
CP28592	Latin, Central European	Central European Alphabet (ISO)	Microsoft / IBM	CP28592
MacCentralEuropean	Latin, Central European		Macintosh	MacCentralEuropean
CP1250	Latin, Eastern Europe		Microsoft / IBM	CP1250
CP20905	Latin, Esperanto	(with full-width Latin and punctuation)	Microsoft / IBM	CP20905
CP860	Latin, Portuguese	MS DOS Portuguese	Microsoft / IBM	CP860
ISO 8859-3	Latin, Southeast European	Latin3	International or National Standard	Latin3, ISO-8859-3
ASCII	Latin, US English	US-ASCII, CP367	International or National Standard	ASCII
CP037	Latin, US English	EBCDIC	Microsoft / IBM	CP037
CP1026	Latin, US English	EBCDIC	Microsoft / IBM	CP1026

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP1252	Latin, US English	MS Windows Latin1 (ANSI)	Microsoft / IBM	CP1252
CP20105	Latin, US English	US ASCII	Microsoft / IBM	CP20105
CP437	Latin, US English	MS-DOS Latin US	Microsoft / IBM	CP437
CP500	Latin, US English	EBCDIC	Microsoft / IBM	CP500
CP875	Latin, US English	EBCDIC	Microsoft / IBM	CP875
CP10017	Malayalam	Macintosh Malayalam	Microsoft / IBM	CP10017
CP865	Nordic	MS DOS Nordic	Microsoft / IBM	CP865
ISO 8859-10	Nordic	Latin6	International or National Standard	Latin6, ISO-8859-10
MacRomanian	Romanian		Macintosh	MacRomanian
CP852	Slavic	MS DOS Slavic	Microsoft / IBM	CP852
Adobe-Symbol-Encoding	Symbol	(used in PS printers)	Adobe	Adobe-Symbol-Encoding
Adobe-Zapf-Dingbats-Encoding	Symbol	(used in PS printers)	Adobe	Adobe-Zapf-Dingbats-Encoding
CP10008	Symbol	Macintosh RSymbol (Right-left symbol)	Microsoft / IBM	CP10008
MacDingbats	Symbol		Macintosh	MacDingbats
MacSymbol	Symbol		Macintosh	MacSymbol
CP20838	Thai	(with full-width Latin and punctuation)	Microsoft / IBM	CP20838
CP874	Thai	IBMThai	Microsoft / IBM	CP874
ISO 8859-11 (draft)	Thai	ISOLatinThai	International or National Standard	Thai
MacThai	Thai		Macintosh	MacThai
CP10081	Turkish	Macintosh Turkish	Microsoft / IBM	CP10081
CP1254	Turkish		Microsoft / IBM	CP1254

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
CP28599	Turkish	Turkish (ISO)	Microsoft / IBM	CP28599
CP857	Turkish	IBM Turkish	Microsoft / IBM	CP857
ISO 8859-9	Turkish	Latin5	International or National Standard	Latin5, ISO-8859-9
MacTurkish	Turkish		Macintosh	MacTurkish
MacUkrainian	Ukrainian		Macintosh	MacUkrainian
BMP	Unicode		Unicode	BMP, Unicode20: big-endian
Java	Unicode	Way of representing Unicode characters in ASCII	Sun	Java, Unicode20: BOM: Java, Unicode11: Java, Unicode11: BOM: Java
UCS2	Unicode	ISO-10646-UCS2, UTF16	Unicode	UCS2, Unicode, Unicode20: UCS2
Unicode Big-endian	Unicode		Unicode	big-endian, Unicode20: big-endian, Unicode11: big-endian, Unicode11: BOM: big-endian
Unicode Little-endian	Unicode		Unicode	little-endian, Unicode20: little-endian, Unicode11: little-endian, Unicode11: BOM: little-endian
Unicode11-UCS2	Unicode		Unicode	Unicode11-UCS2, Unicode11: UCS2, Unicode11: BOM: UCS2

Table 28. Character Set Values Used in Email Campaigns

Encoding	Character Set Name	Also Known As	Vendor/Standard Body	Character Set Value (Unicode)
Unicode11-UTF7	Unicode		Unicode	Unicode11-UTF7, Unicode11:UTF7, Unicode11:BOM:UTF7
Unicode11-UTF8	Unicode		Unicode	Unicode11-UTF8, Unicode11:UTF8, Unicode11:BOM:UTF8
UTF7	Unicode		Unicode	UTF7, Unicode20:BOM:UTF7
UTF8	Unicode		Unicode	UTF8, Unicode20:BOM:UTF8
UTF-EBCDIC	Unicode		Unicode	UTF8-EBCDIC, UTF-8-EBCDIC
CP1258	Vietnamese		Microsoft / IBM	CP1258

C

Logical Entity Relationships

Table 29 shows the logical entity relationships between marketing objects, business components, and specific columns in the S_SRC table.

Table 29. Logical Entity Relationships for Marketing Objects

Object	Business Component Name	Columns in S_SRC					
		CAMP_TYPE_CD	PAR_SRC_ID	SUB_TYPE	TEMPLATE_ID	TMPL_ID	ULT_PAR_SRC_ID
Campaign	Campaign	Campaign	Parent Campaign Id	MARKETING_CAMPAIN	Campaign Template Id	Stage Id	Program Id
Campaign Template	Campaign Template	Campaign	NULL	MARKETING_CAMPAIN	NULL	Stage Id	Program Tmpl Id
Marketing Plans	Marketing Plans	Marketing Plan	Parent Mktg Plan Id	MARKETING_CAMPAIN	NULL	NULL	NULL
Program	Program Container	PROGRAM_CONTAINER	NULL	MARKETING_CAMPAIN	Program Template Id	NULL	Program Id
Program Template	Program Template	PROGRAM_CONTAINER	NULL	MARKETING_CAMPAIN	NULL	NULL	Program Tmpl Id
Stage	Program (DBM)	STAGE	NULL	MARKETING_CAMPAIN	NULL	Program Id	Program Id

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