Oracle Responsys Classic Connect

User Guide

Contents

1 Connect

> ⓘ **Important**: Oracle Responsys is releasing a new Connect user experience. The new UI is currently under measured deployment and will be rolled out over time. This guide provides information on Classic Connect. To read the documentation about the new Connect UI, refer to the Oracle Responsys online help. Learn more about the roll out on Topliners.

Connect allows you to automate the transfer of uploaded and downloaded data to and from lists, list filters, supplemental tables and event data feeds. You can run jobs one at a time, or collect them into groups to be executed sequentially.

2 Creating Export Jobs in Classic Connect

You can create and configure export jobs using Classic Connect.

To create an export job using Classic Connect:

1. Click ▦ **Data** on the side navigation bar, and select **Connect**.

2. Click **Create Job** and select **Export Data**.

3. Follow the steps in the wizard as described below.

For information about feeds, see Exporting Event Data Feeds.

2.1 Step 1 – Source Specification

1. Specify the source of your export data.
   - List
   - Audience
   - Audience scope data
   - App Channel List (available only if an App Channel list exists)
   - List Filter
   - Profile Extension Table Data
   - Supplemental Table Data

   Additionally, you can select the **Export all records** option to export all records in your selected data source.

Alternately, you can select the **Only export records inserted or updated since the time of the last job run** to restrict records to those modified since the last job run (based on the timestamp of your last job run).

> 💡 **Note**: If you select this option and use a SQL view data source, you must include the MODIFIED_DATE_ field in the select statement.

After you specify the source, select the name of the specific item you want to export. For Lists, simply pick it from the drop-down list. For an Audience, Audience Scope File, App Channel List, List Filter, and Profile Extension Table, you must select the list to which it relates first. For Supplemental Table Data, select a folder, highlight the file, and move it into the **Selected Table** area.

2. Click **Next**.

2.2 Step 2 – File Location and Specifications

2.2.1 File Server Location

In File Location, provide file server specifications related to accessing an Oracle Responsys file server or an external server to process your export jobs.

> 💡 **Note**: Not all accounts have access to the external server options. To add an external server, please contact your account manager.

- Responsys File Server – Default connection; configured to transfer/export jobs via your Responsys SCP (Secure Copy Protocol) account file server.

- External Server by SFTP - Secure File Transfer Protocol; a secure version of FTP. Using SFTP is highly recommended as opposed to using FTP.

- External Server by FTP - File Transfer Protocol; a data transfer protocol between a local system and any network-connected system.

2.2.2 Target File Specifications

- **File to be created** - Enter full name of data file to be downloaded. Keep in mind the following:

- This option is not applicable for Feed, Coremetrics, Omniture or Salesforce downloads.

- The Prefix and Suffix are optional.

- When the file is created, the jobID and executionID are automatically added as a prefix to the file name. This means that you must include the jobID and execution ID when referring to the file.

- **Character set of file** - Select character set for that file.

- **Fields are delimited by** - Select the delimiter (typically a tab or comma) that divides the fields (columns) in the file to be downloaded.

- **Fields are enclosed by** - Specify whether text columns are enclosed in single, double quotation marks, or None.

- **Insert column header as first line** - Click checkbox to have first line of downloaded file be a column header.

- **Encryption/compression** - To maintain data in a secure form using encryption, choose whether to encrypt or compress your download job with PGP/GPG. There are three options: Compress a file, Compress and encrypt a file with PGP/GPG key, or Do not encrypt or compress a file.

- **Ready File Options** (optional) - For validation purposes, you may choose to have an empty "Ready File" or a count "Ready File" created after your download completes. Use this feature to validate the completion of your download process (use **empty** Ready File option), and/or compare simple record counts to verify that all expected record counts were transferred (use

count Ready File option). This is similar to the way the count file is used for validation of incoming job upload file. For either option, the Ready File and your download job name are the same.

2.2.3 Responsys File Server Configuration

By default, Connect jobs are configured to import/export via your Responsys SCP (Secure Copy Protocol) account file server. This account includes three directories: import, export, and archive.

You may also create your own directories using an SSH (Secure Shell) client.

> **ⓘ Important**: If not already established, Responsys Support and your own IT team will need to work together to generate an SSH-2 public/private key pair. This ensures you secure access to your SCP account via an SSH/SCP client. You may also create your own directories using an SSH (Secure Shell) client.

To complete this configuration selection, specify the directory pathname where your files can be accessed.

2.2.4 External Server Configurations by SFTP

- **Hostname** – Select hostname from the drop-down menu.

- **Directory Path** – Enter pathname for associated directory.

- **Username** – Enter username allowing you access to your SFTP connection.

- **Authentication** – Two authentication options are available: password or key authorization.
    1. **Password** authorization – Passwords are stored, and may provide simpler access, however, they are not as secure as key authorization.

    2. **Key** authorization - Using a key is the preferred and most secure authorization solution.

To process your first upload job using a key authorization, you must click Access or Generate Key Information, and enter your email address. The resulting email to that address provides your public key information, as well as instructions for adding this public key to your SFTP account.

2.2.5 External Server Configuration by FTP

Setting up an external FTP configuration is very similar to the procedure for SFTP (see above). The exception is that only an unsecured password is used for access authentication.

> **ⓘ Important**: For security reasons, it is highly recommended that you use SFTP instead of FTP.

2.3 Step 3 – Options

On the Job Run Options page of the Wizard, select whether to receive email notification after each job is run, only after a failed job, or not at all. Check the box below to process any previously missed files.

2.4 Step 4 – Job Schedule

Select details for when and/or how frequently this job should be scheduled. You can run it once or on a recurring schedule. The typical setting for recurring is once a day. If you select Run on Demand, you will have to manually run the job at the time you decide.

> **ⓘ Important:** To ensure that leap years and months with 31 days do not cause issues, you can schedule the run for the **Last day of the month** instead of the 29th, 30th, or 31st day of a month.

Notes

- On the main Connect page, you have the option to manually execute a job displayed in the All Jobs section. Select the desired job, and click Run Now.

When setting the start time of a Connect job, select one of four time slots within the hour: 0-14, 15-29, 30-44, 45-59. For each scheduled job, the system picks a random minute (for example, 12 within the 0-14 segment). This distributes the start times of jobs more evenly.

- Connect jobs will start at random times within the chosen time slot. If you try to set up a new Connect job in a slot that overlaps with the current time, then an error message may be issued that states that the time selected occurs in the past. Therefore, as a best practice you should always choose the time slot that is after the current time slot when you schedule a Connect job.

- On the main Connect page, you can manually begin executing a job displayed in the All Jobs section. Select the desired job, and click **Run Now**.

2.5 Step 5 – Activate and Save

1. Enter job name and description.

2. Select whether to activate your job to run according to your predefined scheduling settings. Alternately, you can deactivate this job, and have it remain in an unscheduled processing state.

> 💡 **Note**: You can change either of these selections at any time by selecting the job name (via the Connect page in the All Jobs section), and clicking **Edit Job**.

3. Review your selected job settings and click **Save**.

3 Creating Import Jobs Using Classic Connect

3.1 About source files for import jobs

After an import job runs, the upload file is archived on the server. If the job is successful, the upload file is deleted. If the job fails, the upload file is deleted only in the following circumstances:

- The file is empty

- The file has data issues, such as invalid data format

- The upload file and the count file have different number of records.

3.2 Creating an import job

To create an import job

1. Click ▦ **Data** on the side navigation bar, and select **Connect**.

2. Click **Create Job** and select **Import List Data**.

3. Follow the steps in the wizard to:
   - Choose job configuration settings, including file location and inbound file specifications. See Step 1 - Job Configuration.
   - Enter information about the target list and how the incoming data should be handled. See Step 2 - Target List.
   - Provide field mapping information to match incoming data to the existing file structure. See Step 3 - Field Mapping

- Choose notification options and the campaigns you want to launch if the job runs successfully. See Step 4 - Options.

- Schedule when you want the job to run. See Step 5 - Job Schedule.

- Name the job, activate or deactivate the job, and save it. See Step 6 - Activate and Save. The new job appears in the **All Jobs** tab, where you can start or stop it, edit it as needed, or delete it.

> ♀ Note: You can create a group of jobs, define the order in which they are to be run, and then run the group either on demand or according to a schedule. See Sequencing Jobs in Connect for more information.

3.3 Step 1 - Job Configuration

Provide file server specifications related to accessing a Responsys file server or an external server to process your import job data.

> ♀ Note: Not all accounts have access to the external server options. See your account manager for details.

3.3.1 Upload type

Click the **New Job** button and select one of the three types of uploads from the drop-down list: Import List Data, Import Supplemental Table Data, or Import Profile Extension Data.

3.3.2 File server specifications

- Responsys File Server – Default connection; configured to transfer/upload job data via your Responsys SCP (Secure Copy Protocol) account file server.

- External Server by SFTP – Secure File Transfer Protocol; a secure version of FTP. Using SFTP is highly recommended over using FTP.

- External Server by FTP – File Transfer Protocol; a data transfer protocol between a local system and any network-connected system.

3.3.3 Responsys file server configuration

By default, Connect jobs are configured to import/export via your Responsys SCP (Secure Copy Protocol) account file server. This account includes three directories: upload, download, and archive.

> **ⓘ Important**: If not already established, Oracle Responsys Support and your IT team will need to work together to generate an SSH-2 public/private key pair. This ensures you secure access to your SCP account via an SSH/SCP client. You may also create your own directories using an SSH (Secure Shell) client.

To complete this configuration selection, specify the directory pathname where your files can be accessed.

3.3.4 External server configurations by SFTP

- **Hostname** – Select hostname from the drop-down menu.

- **Directory Path** – Enter pathname for associated directory.

- **Username** – Enter username allowing you access to your SFTP connection.

- **Authentication** – Two authentication options are available: password or key authorization.

  1. **Password** authorization – Passwords are stored, and may provide simpler access, however, they are not as secure as key authorization.

  2. **Key** authorization – Using a key is the preferred and most secure authorization solution.

- **Test Connection** – Click Test Connection (once public key is in place) to confirm that your SFTP connection configuration is valid.

To process your **first** import job using a key authorization, click **Access or Generate Key Information**, and enter your email address. The resulting email to that address provides your public key information, as well as instructions for adding this public key to your SFTP account.

3.3.5 External server configuration by FTP

Setting up an external FTP configuration is very similar to the procedure for SFTP (see above). The exception is that only an unsecured password is used for access authentication.

> ⓘ **Important**: For security reasons, it is highly recommended that you use SFTP instead of FTP.

3.3.6 Inbound file definition

- **File to be Uploaded** – Enter the full name of the data file to be processed, for example, `Customer_List.csv`. Suffix and prefix dates in various formats can be added to the file name.

- **Audience scope file to be uploaded** -. Enter the full name of the data file to be processed.

> ⓘ **Important**: This option is available only if Organizational Access Control and Targeting by Organization are enabled for your account.

The Audience Scope file provides meta data for Targeting by Organization, used in Campaign Workbook, Get Audience activity in Program, and Scheduled Filter.

- **Character Set of File** - Select the character set for that file, for example Unicode (UTF-8).

- **Fields are delimited by** - Select the delimiter (typically a tab or comma) that divides the fields (columns) in the file to be uploaded.

- **Fields are enclosed by** - Specify whether text columns and values are enclosed in single or double quotation marks.

- **First line contains column names** - Select the checkbox if first line contains field names.

- **File Encrypted with PGP/GPG Key** - PGP/GPG key is used when uploading jobs to specify if the uploaded file is encrypted using a key and whether it needs to be decrypted before uploading.

- **File to Confirm Expected Record Count** - Select the checkbox, and enter local filename/extension containing identical schema as file to be uploaded. This file is used as record count comparison between this file, and the number of records that were actually uploaded. While this selection is optional, if used, the filename and extension are required, for example, *Customer_List.cnt*. If its count shows 300 records, but your loaded file only contains 100, a transfer error is noted, and the upload process is abandoned.

3.4 Step 2 – Target List

You can set up import merge rules for a defined List, Supplemental Table or Profile Extension Table to insert new records and/or update existing records. The procedure is different for importing data for each type of list or table:

3.4.1 Lists

1. Select a target list or supplemental table into which the incoming data should be loaded.

2. Select a **Data Import Date Format** to use in timestamp fields.

3. Define merge rules for matching **new** to **existing** records.
    You can use one or two fields. For example, you can match on only email address or both email address and customer ID.

4. Select action to apply when a record matches (based on the merge choices you made), and when a record does not match your criteria.

5. Check whether to reject customer records with empty email, mobile, and/or postal values.

6. Select default permission status for a newly added channel to Opt In or Opt Out.

7. Select the Email Format Values in the incoming file.

8. Select the mobile number format for this job.
    Oracle Responsys validates the format of inbound mobile numbers according to the format selected for your account. The format you select here overrides the account setting for this job.

9. Select this checkbox to enable filtering against the latest load with the same name.

> 💡 **Note**: When selected, you can specify the criteria (via the Filter Designer) for selecting customers within this load to receive a campaign or be exported into a .CSV file.

10. Elect whether to trigger a custom event(s) for any customers associated with this load. This option can be used to involve customers in activities related to Program (using Trigger Custom Event stage) or by using custom event behavior filtering rules.

11. Click **Next**.

3.4.2 Supplemental tables

1. Select a target table into which the incoming data should be loaded.

2. Select a **Data Import Date Format** to use in timestamp fields.

3. Select data handling rules: Do you want to insert the data as new records, completely replace the old records with the new ones, or merge the imported records into the existing list?

4. Click **Next**.

3.4.3 Profile extension tables

1. Select the list corresponding to the target profile extension table.

   If the target list has an associated App Channel List with a PET, you can import data into the App Channel List PET. To do this, select the **Use App Channel List** checkbox.

2. Select the **Target Profile Extension** from the drop-down list.

   If you use the App Channel List, the target profile extension list shows only PETs from that list.

3. If each incoming list cut data file has a consistent schema layout, you can import multiple list cut data files into an automatically generated PET that has the same schema as an existing PET you selected. To do this:

a. Select **Automatically generate new target profile extension** and select the options you want to use.

b. To set the expiration period for the auto-generated PET, enter the period in the **Set expiration period in days** field.

Expiration period must be between 1 and 90 days. Connect will automatically delete the auto-generated PET after it expires.

4. Select a **Data Import Date Format** to use in timestamp fields.

5. Select the fields for matching **new** to **existing** records.

   You can use one or two fields. For example, you can match on only email address or both email address and customer ID.

   If you select one field for the App Channel List PET, you can match on one of the following:

   - RIID_: App Channel List RIID

   - ADVERTISER_ID_: Platform-specific Advertising Id, such as IDFA, Google Advertising Id., or Windows Advertising Id

   - EXTERNAL_DEVICE_TRACKING_ID_: Analytics provider-specific Device Identifier. Please note that App Developers must set this field for all Registration events raised by the PushIO / Responsys mobile SDK.

   If you select two App Channel List match fields are DEVICE_ID_ and API_KEY_

6. Select the action to apply when a record does and does not match.

7. To completely replace the existing table records with the newly uploaded records, select the **Remove all existing records from target table and then insert new records** checkbox.

8. To automatically insert new records into the profile list, select the **Import file records into the profile list** checkbox.

9. Click **Next**.

3.5 Step 3 – Field Mapping

On this page, map and select new field specifications as needed.

You can use a mapping file as the header row for your incoming data file. To do this, click **Upload Mapping File** and select the file to use.

Note the following:

- Long field names are truncated to 30 characters.

- Field names must begin with a letter or number and may contain only letters, digits, and _ (underscore).

- When created, field names are not case-sensitive, but are later translated to all uppercase.

- If any changes result in duplicate field names, you will need to manually rename them.

- All system field names (defined and reserved by Oracle Responsys) end with an underscore character, for example EMAIL_ADDRESS_. As a best practice, uploaded field names should not end with an underscore character since these are reserved for system fields.

- When possible, match like-named incoming fields with existing fields, for example, match CUST_ID to CUSTOMER_ID_.

3.6 Step 4 – Options

You can set the following options for the job:

Notify by email after each failed or successful job run

Sends a notification email after each job run. Email notifications provide information relating to failed and successfully completed jobs, and other issues requiring further investigation. We recommended that you send a notification to one or more email addresses.

Notify by email only after a failed job run

Sends a notification email only if a job fails.

Do not notify

Never sends a notification email after the job runs.

Fail if file is empty

Fails the job if the upload file contains no records.

Raise an event upon successful completion of this job

Upon the successful completion of a Connect job that imports data into a profile list or a PET, makes the job available to Program. When this check box is selected, the job will be available as a Connect event in Program. You will then need to select the job in the program. To do this:

1. In Program, drag a **Connect event** onto the canvas.

2. Right-click the event and select **Properties**.

3. In the Properties dialog, select the Connect job you want from the **Listen for Connect job completion** drop down list.

Launch the following campaigns if the upload job is successful

Launches the selected campaign after the upload job successfully completes.

> ♀ **Note**: If the uploaded job does not complete before the assigned campaign launch timeframe, this automatic campaign launch request is processed.

To send progress notifications of successful campaign launches, select the **Send progress alerts** check box, enter email addresses to receive the notification, and select the notification interval (at completion or every X messages).

To send notifications if a campaign launch fails, select the **Send email notification** check box and enter email addresses to receive the notification.

3.7 Step 5 – Job Schedule

Select details for when and/or how frequently this job should be scheduled. You can run it on demand, once at a preset time slot and date, or on a recurring schedule.

> **ⓘ Important**: To ensure that leap years and months with 31 days do not cause issues, you cannot schedule a recurring monthly run on the 29th, 30th or 31st day of a month.

When setting the start time of a Connect job, select one of four time slots within the hour: 0-14, 15-29, 30-44, 45-59. For each scheduled job, the system picks a random minute (for example, 12 within the 0-14 segment). This distributes the start times of jobs more evenly.

Connect jobs will start at random times within the chosen time slot. If you try to set up a new Connect job in a slot that overlaps with the current time, an error message may be issued that states that the time selected occurs in the past. Therefore, as a best practice, choose the time slot that is after the current time slot when you schedule a Connect job.

> **💡 Note:** You can manually begin executing an active job. To do this, select the job on the All Jobs tab, and click **Run Now**.

3.8 Step 6 – Activate and Save

1. Enter job name.

2. Select whether to activate your job to run according to your predefined scheduling settings. Alternately, you can deactivate this job, and have it remain in an unscheduled processing state.

> 💡 **Note**: You can change either of these selections at any time by selecting the job name (via the Connect page in the All Jobs section), and clicking **Edit**.

3. Click **Save** and review your selected job settings on the main Connect page.

3.9 Warning on rejected records

There are several situations in which email records are rejected during a list import:

- Top level domain names that are not listed (for example, lala_smith@lul.xyz). See the Internet Assigned Numbers Authority (IANA) for a list of all allowed domain extensions.

- Badly formatted email addresses (for example, those containing spaces or invalid characters or that are missing the domain name)

- Improper use of field separators and enclosing characters (for example, enclosing quotation marks in another set of quotation marks)

4 Exporting Event Data Feeds Using Classic Connect

You can export behavioral and other data from Connect events from account-wide and campaign-specific response activities to third party programs and reports. Use the data for:

- Audit tracking

- Scrubbing data

- Downloading to external programs

- Campaign analysis using your designated file system or analytics software

We recommend that at a minimum, you select these events for output:

- Launch State

- Opted In

- Opted Out

- Complaint

- Bounced

Each selected event data feed type is exported as an individual .CSV file to the file server you specify. The contents of the file depend on the type of event you choose.

For example, a Sent event data feed type file exports the following field information: Event Type ID, Timestamp, RIID (Responsys ID), Customer ID, Campaign ID, External Campaign ID, Launch ID, Message Size, and List ID.

Additionally, if your account administrator has added any custom feed columns, those are also included.

To begin exporting data :

1. Click **Data** on the side navigation bar, and select **Connect**.

2. Click **Create Job** and select **Export Event Data Feed**.

3. Follow the steps in the wizard as described below.

4.1 Step 1 – Select Event Type

1. On the **Source** page of the Wizard, click the check box for the Event Type you want to download.

2. Click **Next**.

> ♀ **Note**: Each event type can be associated with only *one* active export job. If an event type has already been specified for download by another job, that event type is grayed out and cannot be selected by any other export jobs. For example, one job may output the Bounced Event information, while another simultaneously outputs the Complaint Event information. However, no two active Event Export Jobs can be configured to output the Bounced Event information.

4.1.1 Interaction Events for Email

- **Sent**: Messages by recipient by campaign launch that were successfully sent to the target mail server

- **Failed**: A Failed event per recipient per campaign launch

- **Bounced**: Soft and hard bounces

- **Clicked**: Tracked links. Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Opened**: Tracking individual recipients who opened campaign messages. Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Converted**: Conversions that are registered using the Conversion Tracking functionality (includes Purchase events). Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Complained**: Spam complaints as reported by ISPs through feedback loops

- **Skipped**: Suppressions

4.1.2 Contact Permission Events for Email

- **Opted In**: Any individual change to permission status value

- **Opted Out**: Any individual change to permission status value

4.1.3 Contact Interaction Events for SMS

- **Clicked**: Tracked Links. Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Converted**: Conversions that are registered using the Conversion Tracking functionality (includes Purchase events). Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Failed**: A Failed event per recipient per campaign launch

- **Delivered**: Messages that were successfully delivered

- **Received**: Messages that were received

- **Sent**: Messages by recipient by campaign launch that were successfully sent to the target mail server

- **Skipped**: Suppressions

- **MO Forward Sent**: Messages that were successfully forwarded to an external end point

- **MO Forward Failed**: Messages forwarded to an external end point that resulted in an error

4.1.4 Contact Permission Events for SMS

- **Opted In**: Any individual change to permission status value

- **Opted Out**: Any individual change to permission status value

4.1.5 Contact Interaction Events for MMS

- **Sent**: Messages by recipient by campaign launch that were successfully sent to the target mail server

- **Failed**: A Failed event per recipient per campaign launch

- **Skipped**: Suppressions

4.1.6 Contact Interaction Events for Push

- **Sent**: Supported for both Push and In-App campaigns. Messages by recipient by campaign launch that were successfully sent to the target mail server

- **Failed**: Supported for both Push and In-App campaigns. A Failed event per recipient per campaign launch

- **Opened**: Supported only for Push campaigns, not for In-App campaigns. Tracking individual recipients who opened campaign messages. Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Converted**: Supported only for Push campaigns, not for In-App campaigns. Conversions that are registered using the Conversion Tracking functionality (includes Purchase events). Includes the device Operating System, Browser, Browser Type, and User Agent String (if enabled for your account).

- **Skipped**: Supported for both Push and In-App campaigns. Suppressions.

- **Bounced**: Supported for both Push and In-App campaigns. Bounced messages.

- **Clicked**: Supported for both Push and In-App campaigns. Total clicks on the message.

- **Uninstalled**: Was app uninstalled on the device.

- **Message Center Sent**: Supported only for Push campaigns. Messages sent to the Message Center.

4.1.7 Launch, Program, Form Audit Events

- **Form Viewed/Submitted**: Form submissions and views

- **Form State**: Captures when a form is enabled or disabled

- **Program Entered/Exited**: Information about Program Entry and Program Exit events

- **Program State**: Information about when a Program is published or unpublished

- **Launch State**: Data about when a launch starts, pauses, resumes and stops, and the campaign type

- **Dynamic Content**: Data about dynamic content for email campaigns

- **Multivariate Test**: Data that helps identify winning versions for a specific test run.

- **Holdout Group**: Available only if Holdout Groups are enabled for the account. Data that helps compare performance of contacts who received a campaign to those who did not.

4.2 Step 2 – Target File Location and Specifications

1. On the Target File page, in the File Location area, access specifications for a Responsys file server or choose an external server.

> 💡 **Note**: Not all accounts have access to the external server options. See your account manager for details.

2. In the File Specifications area:

   a. Select a character set.

   b. Select a delimiter (typically a tab or comma) to divide the fields (columns) in the download file.

   c. Choose whether to enclose text columns in single quotes, double quote, or none.

   d. Choose whether the first line of the exported file contains column headers.

   e. Choose whether to encrypt or compress your export job as a .ZIP or .GZ file.

   f. Choose whether to create a Ready File for validation after the file is exported.
      The options are none, an empty file, and a record count. Use an empty file to validate the completion of your download process. Use a record count file to compare simple record counts to verify that all expected record counts were transferred. This is similar to the way the count file is used to validate a job import file. For either option, the name of the Ready File and your export job are the same.

3. Click **Next**.

4.3 Step 3 – Options

1. On the Options page, select whether to receive email notification after each job is run, only after a failed job, or not at all.

2. Click **Next**.

4.4 Step 4 – Schedule

1. On the Schedule page, select how often you want the export to run.

2. Click **Next**.

4.5 Step 5 – Activate & Save

1. On the Activate & Save page, choose whether to activate or deactivate the export.

2. Add a name and description.

3. Click **Save**.

5 Creating ORCE Import Jobs Using Classic Connect

> ❶ **Important**: This feature is only available if it is enabled for your account.

Oracle Retail Customer Engagement (ORCE) customers can import the following data from ORCE into an existing profile extension table:

- ORCE Loyalty Program

- ORCE Customer Attributes

- ORCE Stratified Segments

5.1 About source files for import jobs

After an import job runs, the upload file is archived on the server. If the job is successful, the upload file is deleted. If the job fails, the upload file is deleted only in the following circumstances:

- The file is empty

- The file has data issues, such as invalid data format

- The upload file and the count file have different number of records.

5.2 Creating an ORCE import job

Before you begin:

Before creating an ORCE Import job, make sure the PET for importing data exists. You cannot create a PET while configuring the job.

To create an ORCE import job:

1. On the All Jobs tab of the Connect page, click **Create Job** and select **Import ORCE Loyalty Program, Import ORCE Customer Attribute, or Import ORCE Stratified Segment**.

2. Provide the **Name** and, optionally, a **Description** for the job can click **Create Job**.

3. Follow the steps in any order to:
    - Choose job profile list and the profile extension (PET) to which data will be imported. See Step 1 - Target definition.

- Provide field mapping information to match incoming data to PET columns. See Step 2 - Field mapping .

- Choose actions to be taken after the job is executed. See Step 3 - Post Processing.

- Choose notification options. See Step 4 - Notification.

- Schedule the job. See Step 5 - Schedule.

- Activate the job. See Step 6 - Activate.

The new job appears in the **All Jobs** tab, where you can start or stop it, edit it as needed, or delete it.

5.3 Step 1 - Target definition

In this step, you select the profile extension into which to import data.

1. Select the list corresponding to the target profile extension table.

2. Select the **Target Profile Extension** from the drop-down list.

3. To replace the existing table records with the newly uploaded records, select the **Remove all existing records from target table and then insert new records** checkbox.

5.4 Step 2 - Field mapping

In this step, you map and select new field specifications as needed.

You can use a mapping file as the header row for your incoming data file.

To use a mapping file:

1. Click **Upload File**, select the file to use and specify the following:

   - **Fields are delimited by** - Select the delimiter (typically a tab or comma) that divides the fields (columns) in the file to be uploaded.

   - **Fields are enclosed by** - Specify whether text columns and values are enclosed in single or double quotation marks.

   - **First line contains column names** - Select the checkbox if first line contains field names.

To map fields:

1. Click .

2. In **Incoming Field**, type the name of the field to map.

3. In **Matches with field**, select the field to which to map.

4. Click Update.

5. Repeat steps 1-4 for each field you want to map.

Note the following:

- Long field names are truncated to 30 characters.

- Field names must begin with a letter or number and may contain only letters, digits, and _ (underscore).

- When created, field names are not case-sensitive, but are later translated to all uppercase.

- If any changes result in duplicate field names, you will need to manually rename them.

- All system field names (defined and reserved by Oracle Responsys) end with an underscore character, for example EMAIL_ADDRESS_. As a best practice, uploaded field names should not end with an underscore character since these are reserved for system fields.

- When possible, match like-named incoming fields with existing fields, for example, match CUST_ID to CUSTOMER_ID_.

5.5 Step 3 – Post processing

In this step, you can select the following options.

5.5.1 Raise an event upon successful completion of the job (with one or more records loaded)

Automatically starts a program upon the successful completion of the job. When this check box is selected, the job will be available as a Connect event in Program. You will then need to select the job in the program. To do this:

1. In Program, drag a **Connect event** onto the canvas.

2. Right-click the event and select **Properties**.

3. In the Properties dialog, select the Connect job you want from the **Listen for Connect job completion** drop down list.

5.5.2 Launch the following campaigns if the upload job is successful (with one or more records loaded)

Launches the selected campaign after the upload job successfully completes.

> 💡 **Note**: If the uploaded job does not complete before the assigned campaign launch timeframe, this automatic campaign launch request is processed.

To send progress notifications of successful campaign launches, select the **Send progress alerts** check box, enter email addresses to receive the notification, and select the notification interval (at completion of the launch or every X messages).

To send notifications if a campaign launch fails, select the **Send failure notification(s) to** check box and enter email addresses to receive the notification.

5.6 Step 4 – Notification

In this step, you specify whether to send job progress alerts

Progress alerts can be sent either after each job run or only after failed job runs. Email notifications provide information relating to failed and successfully completed jobs, and other issues requiring further investigation. We recommended that you send a notification to one or more email addresses.

1. Select the Send progress alerts to check box.

2. Specify the email addresses to receive the notifications.

   Use commas to separate email addresses.

3. To send alerts after each job run, select **After each failed or successful job run**.
   To send alerts only for failed jobs, select **Only after a failed job run**.

5.7 Step 5 – Schedule

In this step, you schedule the job. The job can run once on a specified date and time, or on a recurring schedule.

> ℹ **Important:** To ensure that leap years and months with 31 days do not cause issues, you cannot schedule a recurring monthly run on the 29th, 30th or 31st day of a month.

When setting the start time of a Connect job, select one of four time slots within the hour: 0-14, 15-29, 30-44, 45-59. For each scheduled job, the system picks a random minute (for example, 12 within the 0-14 segment). This distributes the start times of jobs more evenly.

> 💡 **Note:** The job will start at random times within the chosen time slot. If you try to set up a new job in a slot that overlaps with the current time, an error message may be issued that states that the time selected occurs in the past. Therefore, as a best practice, choose the time slot that is after the current time slot when you schedule a Connect job.

To schedule the job

1. Select the option you want and specify the job schedule.

5.8 Step 6 – Activate

To activate the job, click **Activate**.

The job is saved and, if no validation errors occur, is activated. If errors occur, click **View Errors** on the warning message, fix the errors, then activate the job.

6 Sequencing Jobs in Classic Connect

In Connect, you can create a group of jobs, define the order in which they are to be run, and then run the group either on demand or according to a schedule. This allows you to import multiple sets of data in the correct order, for example. Or make sure a list table is uploaded before updating a Profile Extension Table. You can include any upload jobs that are active and set to run on demand.

Jobs in a group can only run one at a time, but using a group you can run multiple jobs in sequence, with the results of each job affecting the subsequent job. For example, if job #1 fails, job #2 can't run. Without a group, the only way to do that is to set up the first job, run it, examine the results, and then queue up the next job.

The Groups panel of the Connect page shows you all groups that have been created, information about their status, the schedule type, and activation status. From this page you can stop a group that's running or select a group and run it immediately. You can also delete a group. Deleting a group does not delete the individual jobs within that group.

Use these buttons to edit, start, stop, or delete a selected group.

These are the groups created for this account.

To create a new group

1. Click ⊞ **Data** on the side navigation bar, and select **Connect**.

2. Select **Create Job > Create Group** or click the **Groups** tab and click **Create Group**.

3. Follow the steps in the wizard to:

- Choose the jobs to be included and arrange them in the order you want to run them. See Step 1 - Job Sequencing.

- Choose notification options and the campaigns you want to launch if the group runs successfully. See Step 2 - Options.

- Schedule when you want the group of jobs to run. See Step 3 - Schedule.

- Name the group, activate or deactivate the group, and save it. See Step 4 - Activate and Save. The new group appears in the Groups tab, where you can start or stop it, edit it as needed, or delete it.

6.1 Step 1 - Job Sequencing

The first step is to choose the jobs to be included in the group and the order in which you want them to be run. A qualified job can only belong to one group and there must be at least two jobs in a group.

To choose and set the order of jobs

1. Select jobs in the **Qualified Jobs** list and use the right arrow to move them to the **Group** list. Use the left arrow to remove them from the group.
In order to be qualified for a group, a job must be active and set to on-demand. You can add jobs for importing data, but not for exporting it. Nor can you add scheduled jobs, partner integration jobs, or deactivated jobs to a group.

2. Select a job in the Group list and use the up and down arrows to move it into a different position in the list. Use the double arrows to move jobs to the top or bottom of the list.

3. Click **Next**.

6.2 Step 2 – Options

The options for a group are the same as for a Connect job: you can set email notification and list the campaigns to run at the successful completion of the last job in the group. You can't, however, launch a campaign from an individual job in the group.

To choose group options

1. Choose whether and when you want to receive email notifications about the status of a group. You can receive an email after the group is run, when a group fails to run, or none.

2. To launch campaigns at the end of a successful group run, click the **Launch** check box and choose the campaigns you want to launch.
   NOTE: If you choose a campaign that has an automatic launch, the campaign is launched on schedule regardless of whether the group run has finished.

3. To send progress alerts for successful launches, select the **Send progress alerts to** check box, enter the email addresses to receive the alerts, and choose the interval from the **after** drop-down list.

4. To send email notifications for launches that fail, select the **Send email notification if launch fails to** check box and enter the email addresses to receive the notifications.

5. Click **Next**.

7 Step 3 - Schedule

You can run the group on demand, at a specific date and time, or on a recurring schedule. When you set the start time of a Connect group, you select a 15 minute time slot within the hour. The system picks a random minute within the slot to distribute group runs more evenly. If you try to set up a new Group job in a slot that overlaps with the current time, the system may generate an error because part of that time slot has already passed. As with Connect jobs, you can start a group run from the main Groups tab.

> ℹ️ **IMPORTANT:** To ensure that leap years and months with 31 days do not cause issues, you cannot schedule a recurring monthly run on the 29th, 30th or 31st day of a month.

To schedule a group

1. Choose on demand, a specific time, or a recurring schedule for running the group.

2. Click **Next**.

7.1 Step 4 - Activate and Save

Activating and saving a group consists of setting the group status and entering a name for the group. The group name must be unique for the account.

To save and activate a group

1. Enter a unique group name (up to 30 characters).

2. Select whether to activate your group to run according to your scheduling settings.
   Or, you can deactivate this group, and have it remain in an unscheduled processing state. You

can change either of these selections at any time by selecting the job name (via the Connect page in the All Jobs section), and clicking Edit.

3. Click **Save**.

   The new group appears on the Groups tab of the Connect page.

8 Managing Classic Connect Jobs

You can manage and review your Classic Connect jobs using the Connect page.

To view the Connect page, click ⊞ **Data** on the side navigation bar, and select **Connect**.

You can review the status of all Classic Connect job runs, as well as job details and logs for each complete job run.

> 💡 **Note**: At any time, click 🔄 to display the most up-to-date information.

8.1 All Jobs tab

Select the **All Jobs** tab to select and view specifics of imported and exported jobs. Job details include the following.

- **Job ID** - Auto-assigned job IDs are used to identify each job.

- **Group** - Name of the group in which a job is included.

- **Name** - User-defined import/export job name.

- **Job Type** - Import or export type.

- **Running** - Displays a visual cue for the specific jobs that are currently running.

- **Next Run** - Times of next scheduled job run. Non-recurring jobs are left blank.

- **Previous Run** - Times of previous scheduled job run. Scheduled jobs that have not yet been run are left blank.

- **Schedule Type** – One-Time or Recurring. This field displays "On-demand" for job runs generated when you click Run Now.

- **Activation** – Active or Inactive.

> 💡 **Note**: Click the ⮂ to update the page at any time.

8.2 Working With Jobs

To manage your job, select a job on the **All Jobs** tab. You can then perform one of the following actions:

- **Edit** – Opens upload/download process pages where you can make your modifications.

- **Run Now** – Immediately executes selected job.
  NOTES: 1) Using this option does not affect any scheduled future run times. 2) This option is not available for Connect event data feeds or for Coremetrics, Salesforce or Omniture jobs.

- **Delete** – Deletes selected jobs. A confirmation message appears before jobs are deleted. This option does not delete any loaded records that have previously been successfully processed.

- **Stop** – Stops a running job. A confirmation prompt appears before the job is stopped.

- **Copy** –Creates a copy of an Inactive import or export job. When you copy a job, the **Copy Job** dialog opens, where you specify the name and, optionally, a description for the copy. The copied job will be Inactive after it is created. Note that you cannot copy the following:

- Export Event Data Feed jobs

- Partner integration jobs

- Group jobs

- Active jobs

8.3 Completed Jobs

Select the **Completed Jobs** tab to select and view specifics for all activities related to each executed job. Job details include:

- **Job ID** and **Run ID** - Auto-assigned job IDs to identify each job. Each instance of a job run execution has its own identifier, and that is a concatenation of the Job ID and Run ID in the form `JobID.RunID.`

- **Group ID** and **Run ID** - Auto-assigned group IDs to identify each group. Each instance of a group run has its own identifier, and that is a concatenation of the Group ID and Run ID in the form `GroupID.RunID.`

- **Group** - Name of the group in which a job is included.

- **Name** - User-defined import/export job name for Coremetrics, Salesforce, Omniture and export event data feed jobs.

- **Job Type** - Identifies whether a Coremetrics, Salesforce, Omniture or export event data feed job was imported or exported.

- **Start Time** and **Duration** - Start and duration times of each activity associated with an individual job.

- **Run Status** - Failed or Success.

8.4 Viewing Job Logs

To view job logs, select the job on the **Completed Jobs** tab and click **View Log**. Job logs can be helpful for failed and partially completed jobs, or other issues requiring further investigation.

> 💡 **Note**: Only information for fully completed job loads are included in a Job Log.

8.5 Groups

Select the **Groups** tab to view details of activities related to groups of Connect jobs.

Group details include:

- **GroupID** – Auto-assigned group ID that identifies each group.

- **Name** – User-defined group name.

- **Running** – Indicates when a group is running.

- **Next Run** – Next scheduled date for the group to be run.

- **Previous Run** – Date and time when the group was last run.

- **Schedule Type** – One-time, recurring, or on-demand.

- **Activation** – Active or Inactive.

Learn more about creating groups in Classic Connect.