



Oracle Eloqua Segments

User Guide

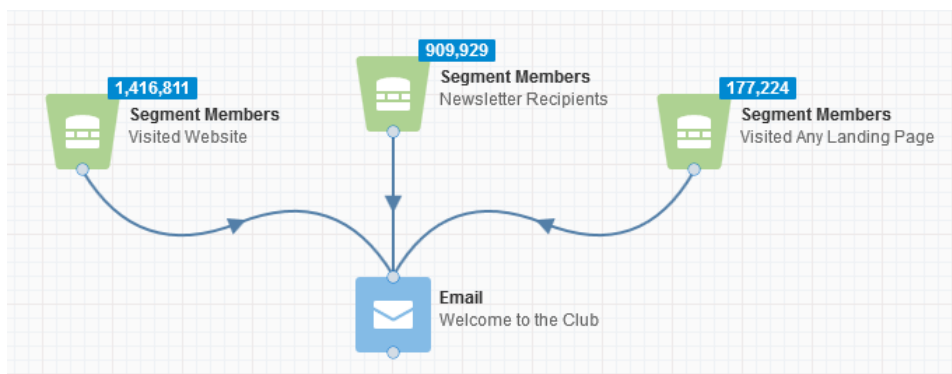
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Segments

Segments are groups of contacts generated based on filter criteria and contact lists. Segments can filter contacts based on criteria like whether or not they receive a newspaper, whether or not they registered for a conference, or whether or not they visited a landing page.

Segments are used to feed email distribution in campaigns. They allow you to specify which contacts are included, and then to customize the subsequent actions for those contacts:



Examples

Segments can be very general, like "Email Opened," or very specific, like "Arborists who live in Minnesota." Create segments that are appropriate for your company's needs.

In most cases, it is more efficient to create small, targeted segments that you can combine together to reach the entire audience. Creating large, complex segments that

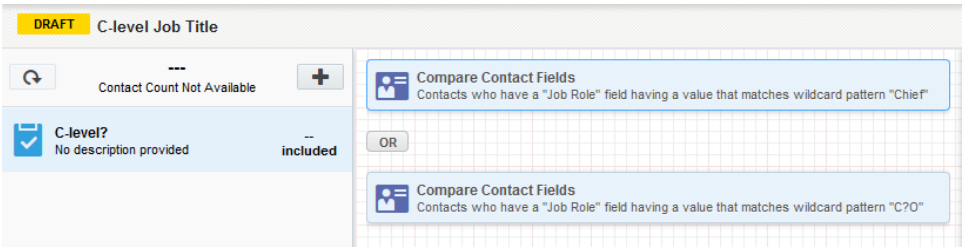
are only appropriate for a single campaign is more time-consuming, and prevents you from being able to reuse common segments in future campaigns. As always, your business needs should determine how you create your segments.

Take the [academy courses on segmentation](#) to learn beginner to advanced segmentation skills.

Consider the following examples of segments:

Example 1: Segment organized by job title

In this example, you want to create a segment that includes only executives that you consider to be decision-makers among your contacts. Based on your product knowledge, you know that the primary purchase decision-makers are the CEO, the CTO, the CIO, and the CMO, along with SVPs, EVPs, and VPs for these functions. When you create your segment, you can then filter based on those job titles. The following example includes all C-level executive:

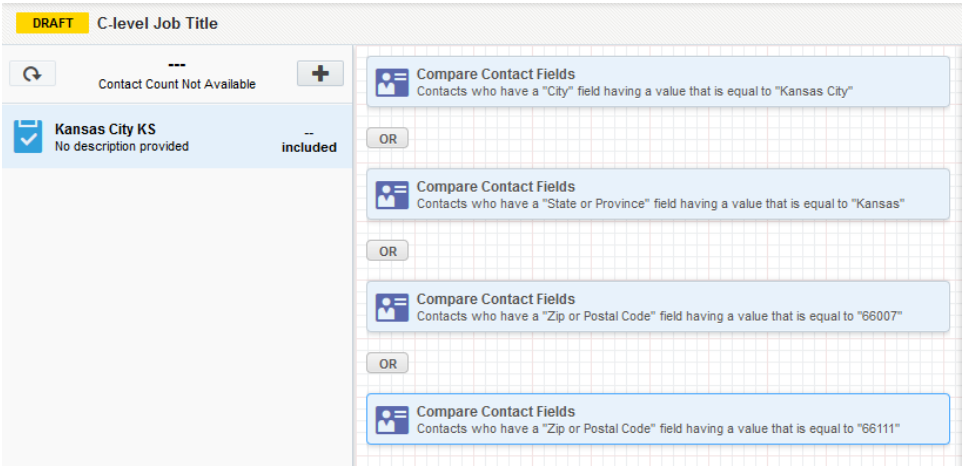


Example 2: Segment organized by sales territory

It is relatively easy to create a segment by sales territory if every one of your territories corresponds to a single field value, such as a specific state, city, county, or zip code. For sales territories that are harder to define, such as territories that cover multiple states, or portions of different states, you can use multiple selection criteria to capture the whole area.

For example, suppose your filter needs to cover an entire city as well as a few zip codes outside the city. Your filter would then need to include both the city and the extra zip codes.

Specifically, consider the example of Kansas City. There are two cities called Kansas City: one is in Missouri, and the other is in Kansas. If you created your segment based only on city name, you would include contacts from both cities. To select only one, you would need to include the state. In the following figure, the sales territory includes Kansas City, KS, and a few postal codes just outside the city. The contacts meeting this criteria are placed in a segment called "Kansas City KS Sales Territory."



Example 3: Setting up exclusion criteria

In a special case, you can choose to universally exclude some contacts from all segments. Your Customer Administrator must set up these "System-Wide Exclusions" for you. You can set up System-Wide Exclusions based on a wide variety of criteria, but System-Wide Exclusions are most frequently used to exclude all email addresses that belong to a competitor's domains, or a competitor's partner's domains.

Additional resources



[Oracle University: Modern Marketing: Revenue Performance Management Series](#)

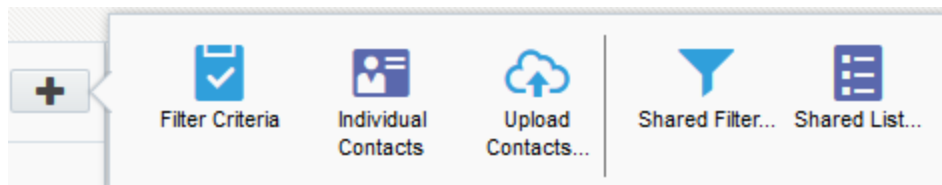
[Oracle University: Eloqua 10: Advanced Segmentation](#)

Creating segments

Segments are groups of contacts that grouped together based on criteria you specify. A segment may be a list of contacts you provide, or it may be more dynamic based on implicit or explicit information about the contact. After you create a segment it can be used throughout Oracle Eloqua.

To create a new segment:

1. Navigate to **Audience** , then click **Segments**.
2. Click **Create a Segment**.
3. Click **Blank Segment** or a template, then click **Choose**.
4. To build your segment, in the left pane, click **Add** . Then click one of the following options.



- **Filter criteria:** Filter contacts based on implicit or explicit data about the contact. For example, filter for a hot lead score or engaged contacts. Or filter based on contact or account fields. Filters are a powerful component of segmentation and you can include multiple filters to make sure you reach your target audience.

🌙 Important: When you filter by activities, it typically looks at the past 1 year's data. However, for Subscription and Bounceback activities, it can search up to 10 years. For instance, if you filter for activities before May 15, 2019, it will only search from May 14, 2018, to May 14, 2019. Additionally, the filter can't look back more than two years from today's date. So, if today is March 18, 2019, and you filter for activities before April 22, 2007, the system will only search from March 18, 2017, to March 18, 2018. Also, the system won't show clicks or opens for emails sent more than 760 days ago.

- **Individual contacts:** Add individual contacts from your database.
- **Uploading contacts:** Upload contacts from an upload file.
- **Shared filter or shared list:** Use a shared filter or list available to you.

🕒 Tip: You can rearrange segment elements by dragging and dropping.

Contact Count Not Available	
<input checked="" type="checkbox"/> Email activity No description provided	-- included
<input type="checkbox"/> BPC Template - Webcast Regi... Holds all Contacts who submitted ^...	0 included


5. Choose any additional options:

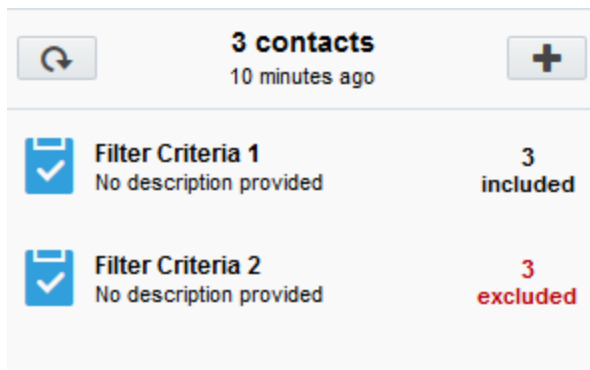
- To exclude contacts from the segment, see [Excluding segment criteria](#)
- To combine segment criteria, see [Creating contact lists from a segment, or some example](#)




scenarios.


- To share a segments filters or lists, see [Sharing filters and lists](#)

6. Click **Save**.

After you save the segment, Oracle Eloqua calculates the number of contacts in the segment. You can click **Refresh**  to see the latest totals.



3 contacts		
10 minutes ago		
 Filter Criteria 1 No description provided	3 included	
 Filter Criteria 2 No description provided	3 excluded	

 **Tip:** The more criteria you add, the longer it can take to refresh the segment totals. Each criterion must be evaluated against the entire contact database. So, the fewer criteria, the faster the segment totals can be returned.

When a segment is added to a campaign or to a program, the segment becomes Active and you cannot delete it. From a campaign canvas or program canvas, users can also see how many contacts the segment includes. However, the totals shown on the canvas might not be the same as the totals you see for the segment itself. See [Tracking segment members in campaigns or programs](#) for more information.


You can change an Active segment, but changes you make can impact active campaigns or programs.

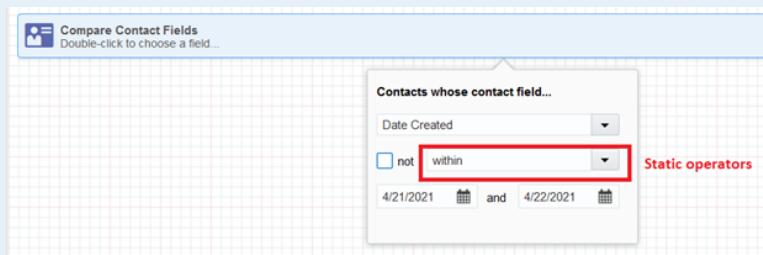
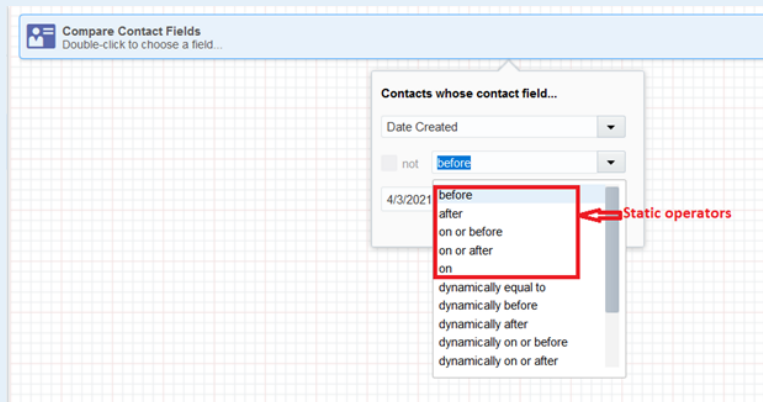
Adding individual contacts to segments

You can select individual contacts to a segment. This is ideal when you want to ensure that you include a specific contact in your segment.


Good to know

- Existing Oracle Eloqua customers can have the option to enable Segment Configuration for TimeZone. This feature evaluates date/time field filters in the executing user's timezone. Previously, all filtering was based on Eastern Standard Time (UTC -5:00).
- To enable Segment Configuration for TimeZone, log a service request with [My Oracle Support](#). Once you enable this feature, it cannot be reversed.
- Newly provisioned Oracle Eloqua instances will have Segment Configuration for TimeZone enabled by default.
- Filter operators are divided into two categories: Static Operators (before, after, on or before, on or after, on, within) and Dynamic Operators (dynamically equal to, dynamically before, dynamically after, dynamically on or before, dynamically on or after, within the last, within the next).
- If Segment Configuration for TimeZone is enabled, Static Operators will use the filter creator's time zone to convert criteria and store it in the database. Segment filter execution is based on these database values, which are already converted into Eastern Standard Time (EST). No Conversion is done during execution.

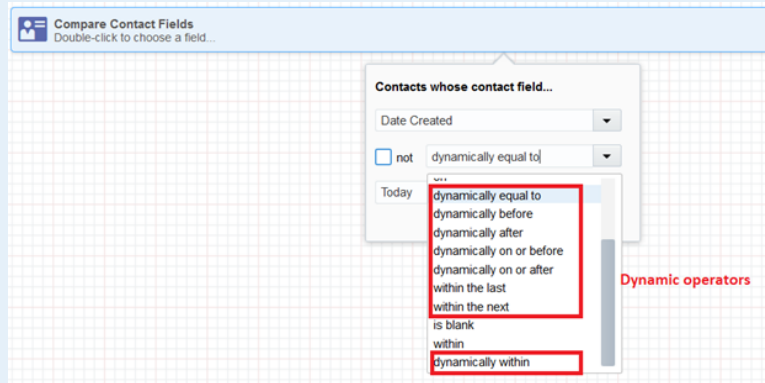
 **Example:** A contact's *DateCreated* operator is before 2021-04-03. If the user who created the filter is from Australian Eastern Standard Time (AEST), Oracle Eloqua converts the date entered from 2021-04-03 12:00:00 AM in AEST to 2021-04-02 9:00:00 AM in EST to store in the database. When executing the filter, the segment finds all contacts with the created date before 2021-04-02 9:00:00 in EST.







- If Segment Configuration for TimeZone is enabled, Dynamic Operators will use the executing user's time zone to calculate results.

 **Example:** A contact's *DateCreated* operator is **dynamically equal to** "today". If a user executing the filter is from AEST and "today" in AEST is 2021-04-22 5:00 AM, Oracle Eloqua finds all contacts with the created date 2021-04-22 in AEST, which is

from 2021-04-21 10:00 AM to 2021-04-22 9:59:59 AM in EST. Conversion is done during filter execution with the executing user's time zone.

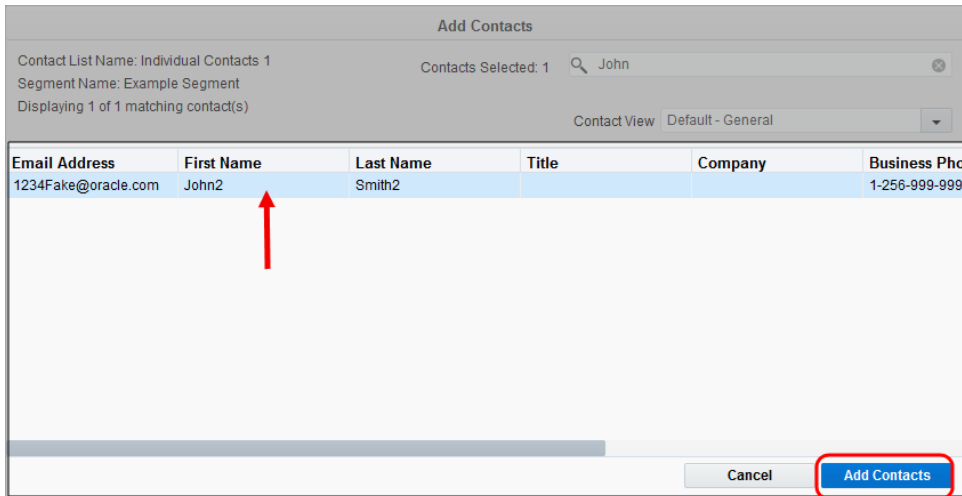


To add an individual contact to a segment:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Click **Add**  in the left pane, then click **Individual Contacts** .
4. Click **Add**  in the right pane.



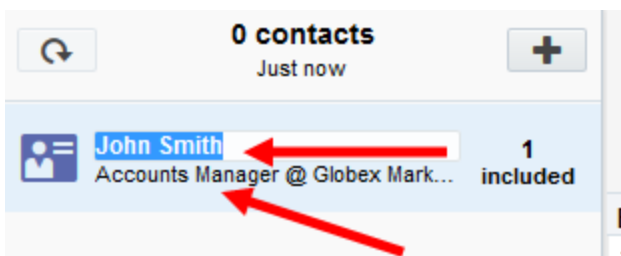
5. Search for the contacts you want to add.
6. Click the contact name in the search results, then click **Add Contacts**.




The contact is now listed in the contact editor.

🕒 **Tip:** If you have the right Contact Interface Access setting, you can right-click on the contact then click **Open Contact** to see contact details.

7. To give the criterion a descriptive name or brief description, in the left pane, double-click the name or description. This will help you easily identify the segment's criteria.



8. Click **Save**.


Click the  icon in the left pane to add more contacts using [filter criteria](#), an [upload file](#), or [by choosing individual contacts](#).

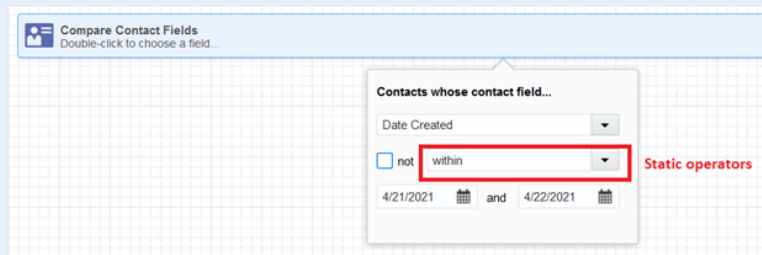
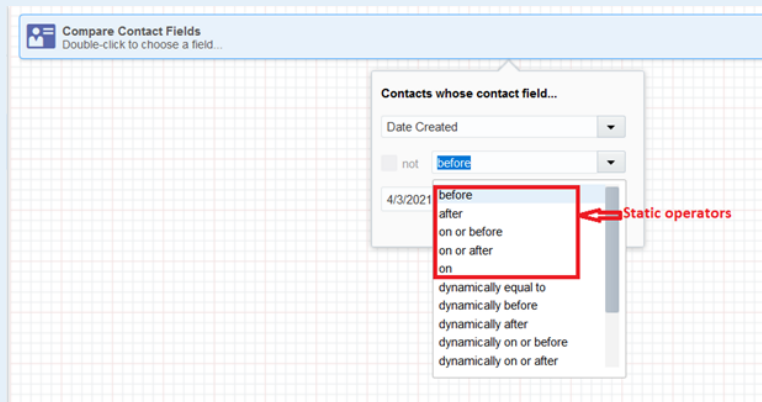
Adding contacts to segments using filter criteria

You can use filter criteria to dynamically build your segment. For example, you can build a segment based on contact fields, lead score, digital body language, and so on.


Good to know

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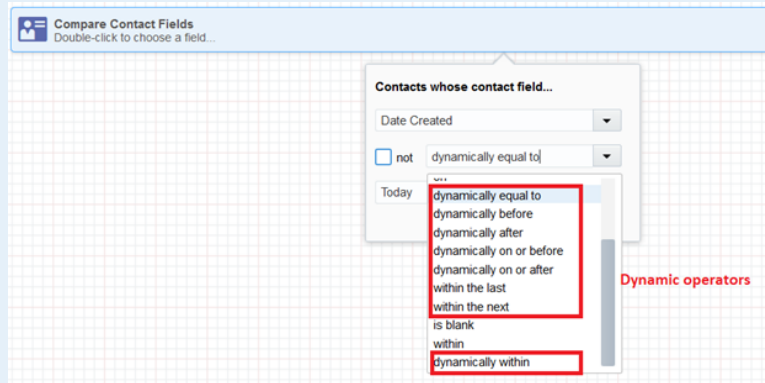
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- If Segment Configuration for TimeZone is enabled, Dynamic Operators will use the executing user's time zone to calculate results.

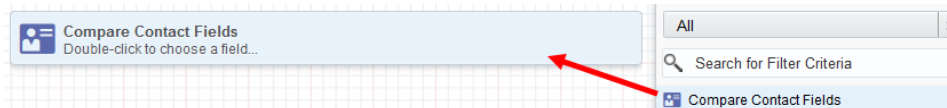
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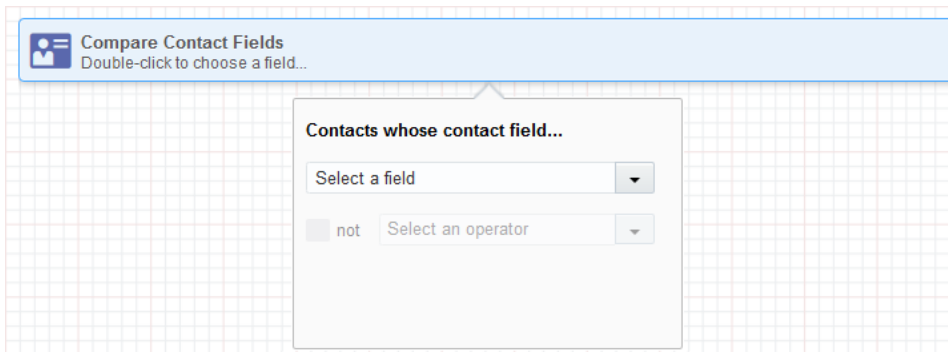
To add contacts using filter criteria:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Click **Add**  in the left pane, then click **Filter Criteria** . A list of filter criteria opens on the right pane.
4. In the right pane, double-click the filter criteria you want to add to the segment.



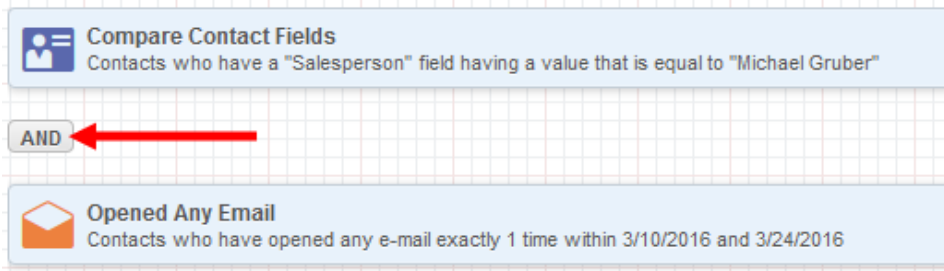
5. Double-click the criteria you added to configure it. Click outside the window to close it.

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Some filter criteria can be configured to use a list as part of the comparison. For example, to filter on a list of countries or based on a couple of sales reps. To build a list for one time use, you can use a quicklist. To be able to reuse the list throughout Oracle Eloqua, use a picklist. Quicklists are great for short lists that are only intended for one time use. But if you want to build a long list or reuse the list, it is best to use a picklist. See [Creating picklists](#) for more information.

6. Add additional filter criteria as needed. When you add filter criteria, you join the filters using a Boolean AND or OR comparison. To switch between AND or OR, click the operator label on the canvas.




When you use the AND operator, all filter criteria must be met in order to be included. In the example above, the segment would include only contacts whose salesperson is Michael Gruber *and* who have also opened an email within the time frame specified.

When you use an OR operator, any of the filter criteria could be met in order to be included. So, in the same example above, the segment would include contacts whose salesperson is Michael *or* if they opened an email.

7. To give your filter a descriptive name or brief description, in the left pane, double-click the filter name or description. This will help you easily identify the segment's criteria.



8. Click **Save**.

🕒 **Tip:** If you want to view the contacts in a *Filter Criteria*, but it's been more than 24 hours since the segment was last calculated, click  to refresh the

segment first. You can then view the filter's contacts in your segment by right-clicking the *Filter Criteria* then clicking **View Contacts...**

After you finish: If you want to share the filter, see [Sharing filters and lists](#)




Uploading contacts directly to segments

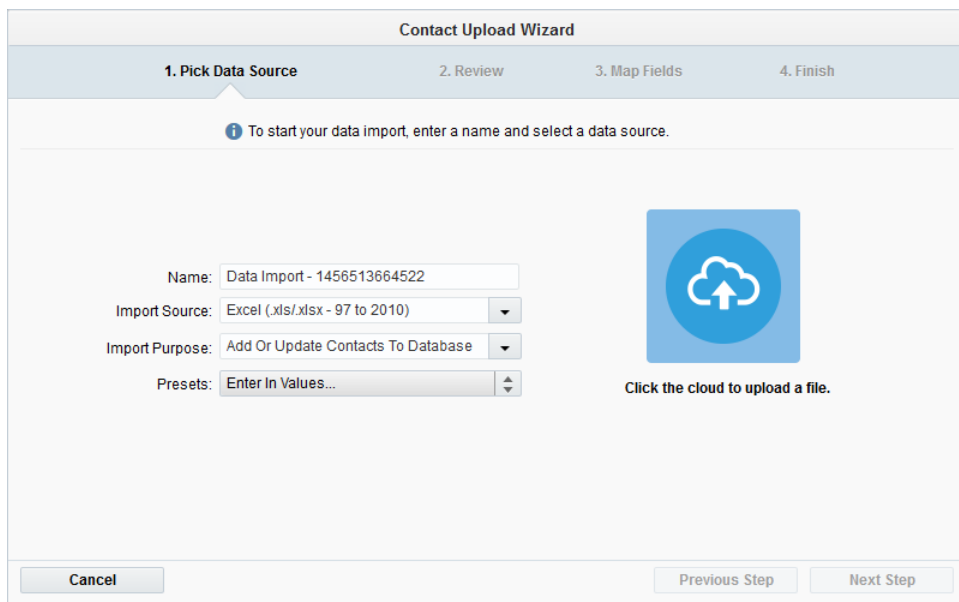
You can use an upload file to add contacts to a segment. Any new contacts are automatically added to your contact database. Depending on how you configure the upload wizard, any existing contact records could be updated with new information you provide in the upload file.

Before you begin:

- Create your upload file (.txt, .csv, .xls, .xlsx). The upload file should only contain the contacts that you want to add or update.
- Separate contact fields in a .csv or .txt file using a comma (,), pipe (|), tab, or semi-colon (;).
- Any field may be quoted (with double quotes).
- Fields containing a line-break, double-quote or the selected delimiter must be quoted.
- If double-quotes are used to enclose fields, then a double-quote in a field must be represented by two double-quote characters.
- The first row of the file must be column headings. Oracle Eloqua will attempt to map the headings to existing contact fields.
- Make sure that you can map the data in your upload file to contact fields in Oracle Eloqua. Use similar naming conventions in your upload file to make this mapping easier.
- Make sure that contacts in your upload file have a unique identifier (such as an email address).

To upload contacts to a segment:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Click **Add**  in the left pane, then click **Upload Contacts** .



Contact Upload Wizard

1. Pick Data Source 2. Review 3. Map Fields 4. Finish


To start your data import, enter a name and select a data source.

Name:

Import Source:

Import Purpose:

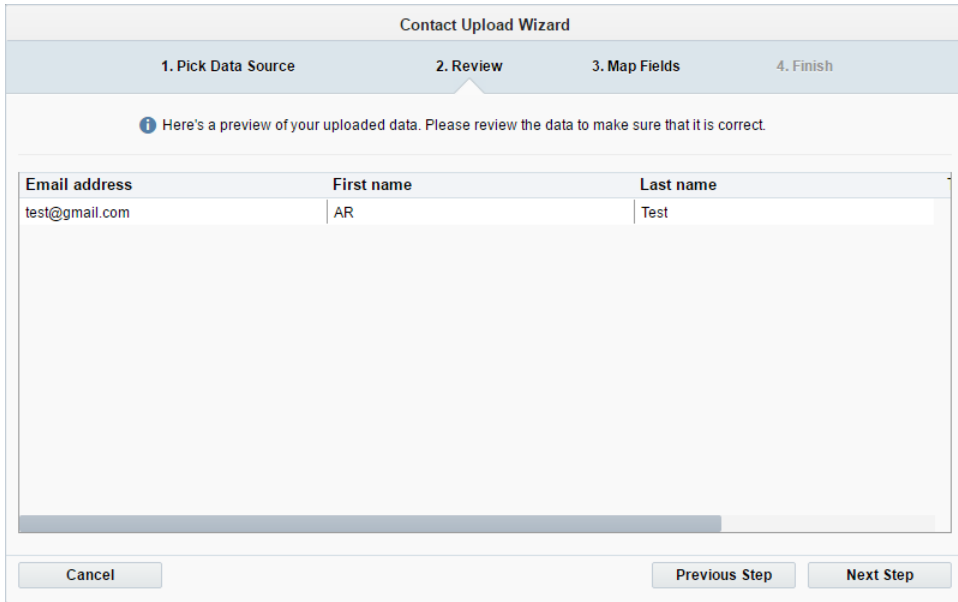
Presets:



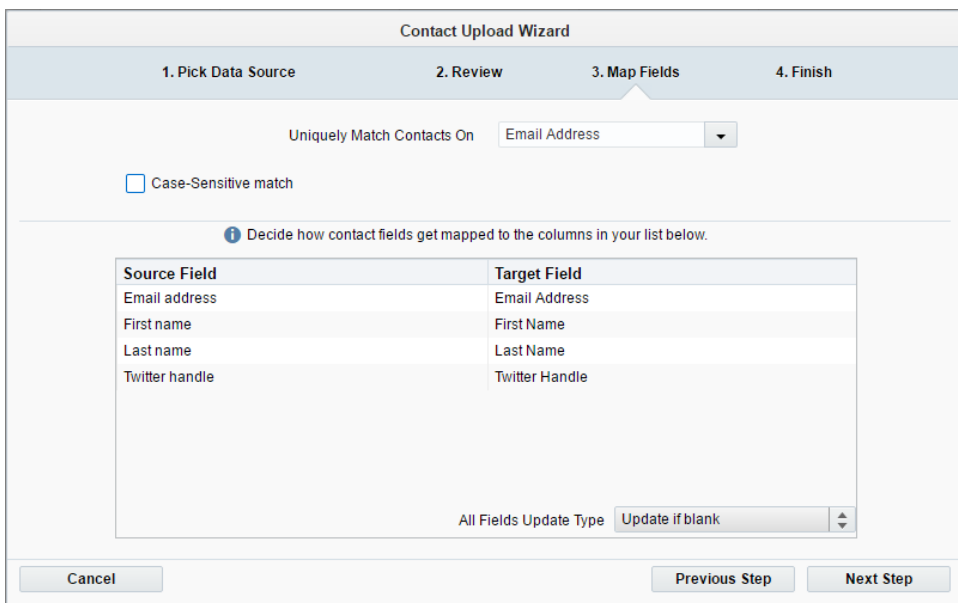
Click the cloud to upload a file.

4. Click  and browse to the upload file.

The upload wizard continues to step 2.



5. Verify the contents of the file on the **Review** tab and click **Next Step**.

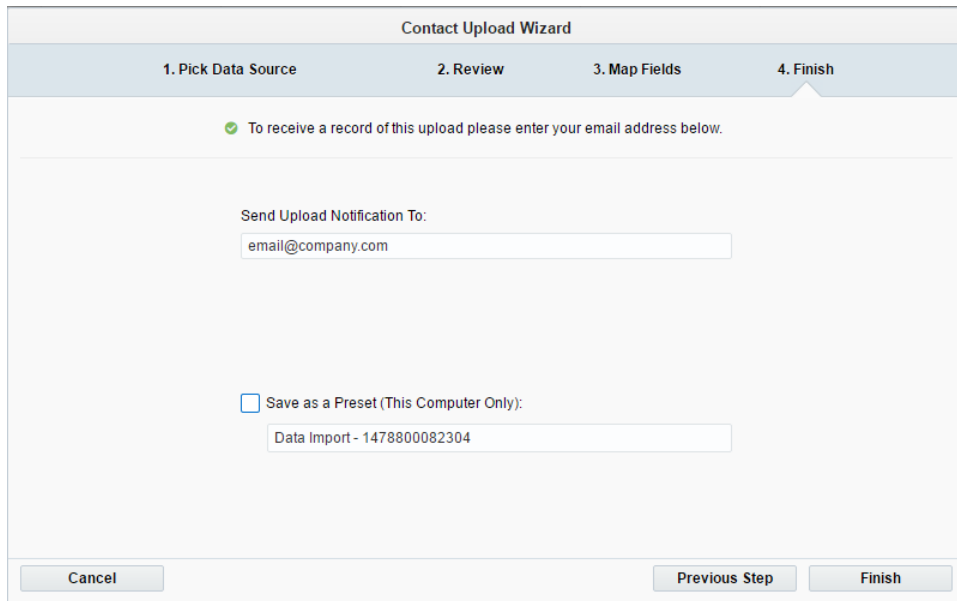


6. Complete the **Map Fields** window.

- Make sure you map all the data in your upload file to the applicable contact field.
- Make sure that you select when you want the contact fields to update using the **All Fields Update Type** drop-down list. For example, update the field if it is blank or not blank. Using **Set to default**

will use the default configuration for each field. If a specific field should be updated differently than the rest, you can double-click the field and configure the update type for that specific field.

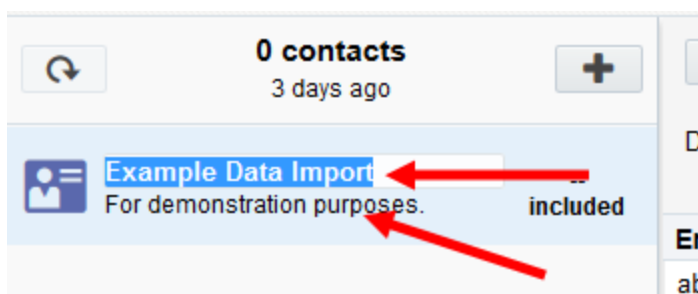
7. Click **Next Step**.




The screenshot shows the 'Contact Upload Wizard' dialog box, specifically the '4. Finish' step. The wizard has four steps: 1. Pick Data Source, 2. Review, 3. Map Fields, and 4. Finish. A green checkmark indicates that the user has successfully completed the previous steps. The main content area contains a message: 'To receive a record of this upload please enter your email address below.' Below this message is a text input field labeled 'Send Upload Notification To:' with the email address 'email@company.com' entered. There is also a checkbox labeled 'Save as a Preset (This Computer Only):' which is currently unchecked. Below the checkbox is another text input field containing the text 'Data Import - 1478800082304'. At the bottom of the dialog, there are three buttons: 'Cancel', 'Previous Step', and 'Finish'.

8. Complete the final step of the wizard and click **Finish**.

9. To give your criteria a descriptive name or brief description, in the left pane, double-click the filter name or description. This will help you easily identify the segment's criteria.




Click the  icon in the left pane to add more contacts using [filter criteria](#), an [upload file](#), or by choosing individual contacts.

Troubleshooting


If your accounts didn't upload as expected [see this troubleshooting information](#).

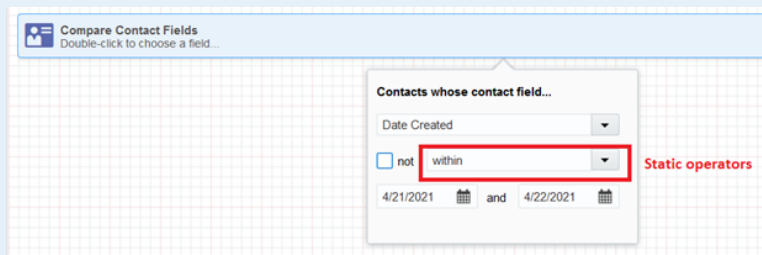
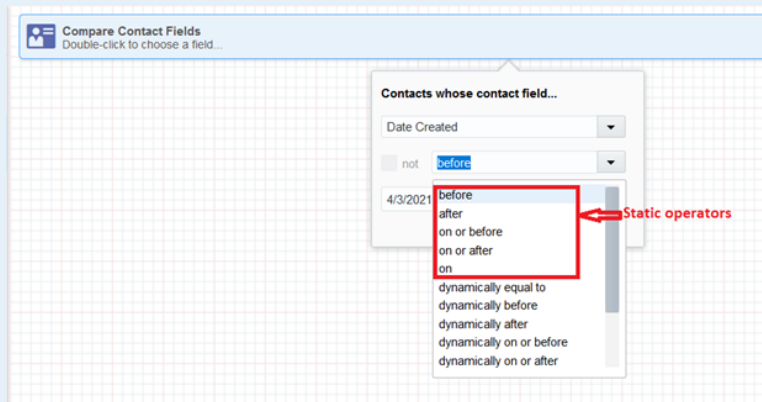
Adding shared filters and shared lists to segments

You can also add contacts to your segments using *Shared Filters* and *Shared Lists*, this allows you to pick from a list of saved common resources. You can view the available shared filters and lists by selecting **Tools** from the **Audience**  menu.


Good to know

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- To enable Segment Configuration for TimeZone, log a service request with [My Oracle Support](#). Once you enable this feature, it cannot be reversed.
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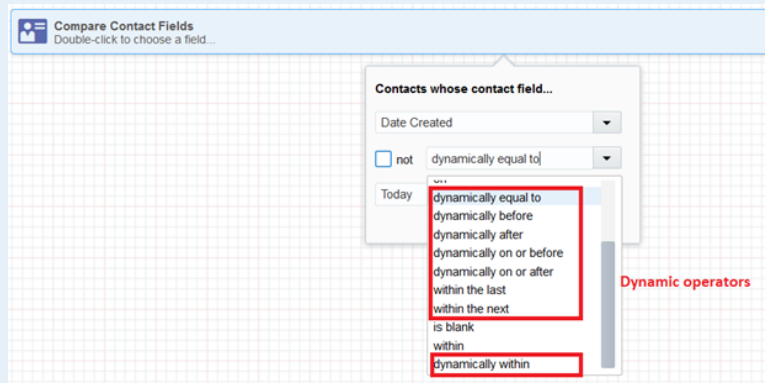
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- If Segment Configuration for TimeZone is enabled, Dynamic Operators will use the executing user's time zone to calculate results.

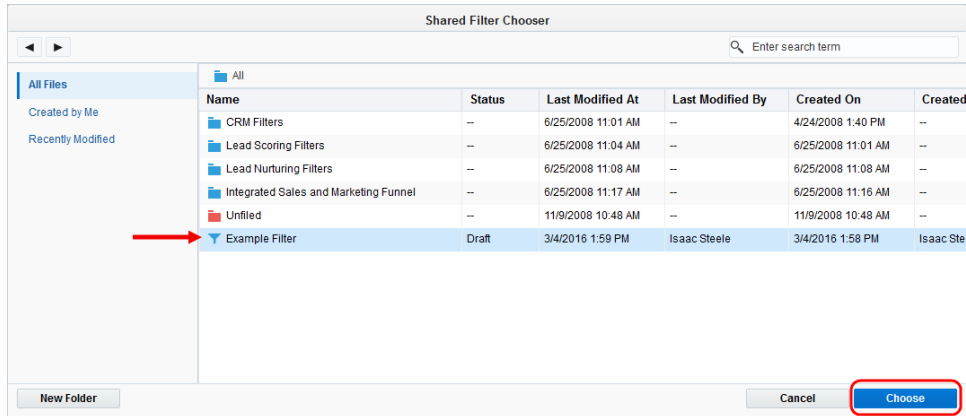
 **Example:** A contact's *DateCreated* operator is **dynamically equal to** "today". If a user executing the filter is from AEST and "today" in AEST is 2021-04-22 5:00 AM, Oracle Eloqua finds all contacts with the created date 2021-04-22 in AEST, which is

from 2021-04-21 10:00 AM to 2021-04-22 9:59:59 AM in EST. Conversion is done during filter execution with the executing user's time zone.



To add a shared filter to a segment:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Click  on the left pane, then click **Shared Filter** .
4. Click the filter you want in the *Shared Filter Chooser*, then click **Choose**.




5. Select either **Make a Local Copy** or **Add Shared Filter**.


Note: If you chose to create a local copy you can make changes to the filter without impacting the shared resource.



6. If you made a local copy, to give the filter or list a descriptive name or brief description, in the left pane, double-click the filter name or description. This will help you easily identify the segment's criteria.


7. Click **Save**.

Click the  icon in the left pane to add more contacts using **filter criteria**, an **upload file**, or **by choosing individual contacts**.


To add a shared list to a segment:

1. Navigate to **Assets** , then click **Segments**.
2. Open an existing segment, or **create a new one**.

3. Click  on the left pane, then click **Shared List**  .
4. Click the desired filter in the *Shared List Chooser*, then click **Choose**.
5. Select either **Make a Local Copy** or **Add Shared List**.

 **Note:** If you chose to create a local copy you can make changes to the filter without impacted the shared resource.

6. If you made a local copy, to give the filter a descriptive name or brief description, in the left pane, double-click the filter name or description.
7. Click **Save**.

Click the  icon in the left pane to add more contacts using [filter criteria](#), an [upload file](#), or [by choosing individual contacts](#).

Creating contact lists from a segment

With Oracle Eloqua, you can create a static contact list using a segment's filters or lists. You can then share the contact list so that others can use it across Oracle Eloqua, or export it so that you can use the list in some other way. [Here are some examples](#) of how you can create contact lists from a segment.

You can use the following options to create a new contact list from a segment's filters and lists:


- [Flattening a segment filter](#)
- [Merging, intersecting, or trimming segment filters and lists](#)

Flattening a segment filter

You can create a contact list from a single filter by flattening it. The new contact list contains all of the contacts that met the filter criteria at the time that the filter was flattened. [View an example scenario](#).

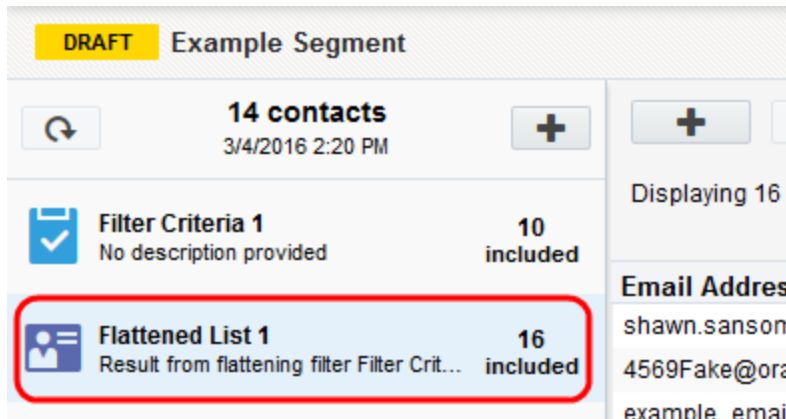
If you want to combine multiple filters to create a contact list, you must [merge](#), [intersect](#), or [trim the filters](#).

To flatten a segment filter:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).

3. Right-click the segment filter that you want to flatten, then click **Flatten**.

The filter is converted to a contact list.



4. Give the new contact a descriptive name or description by double-clicking it.
5. You can then [share the list](#) or [export it](#).

Merging, intersecting, or trimming segment filters and lists

You can create a new contact list by combining a segment's filters and lists. When you do this, you use one of the following options to determine how the final contact list should be generated:


- Merge: Combine all the contacts from the selected filters and lists into a new contact list. Any duplicates are removed from the final list. This is useful for eliminating repeats or crossover between multiple filters and lists. [View an example scenario](#).
- Intersect: Combine all the contacts from the selected filters and lists and only keep the common contacts. [View an example scenario](#).

- **Trim:** Combine all the contacts from the selected filters and lists and only keep the contacts unique to one of the selected filters or lists. [View an example scenario.](#)

Before you begin:

All the filters and lists that you want to combine must be a part of the same segment. If they are in different segments, add them into a new segment so that you can merge, intersect or trim the filters and lists.

To merge, intersect, or trim segment criteria:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Using standard keyboard shortcuts, select each filter or list you want to include in the merge, intersect, or trim.
4. Right-click the components, then click one of the following options:
 - **Merge:** A contact list containing all of the contacts from the merged filters and lists is created.
 - **Intersect:** A contact list containing the contacts that were common to all criteria is created.
 - **Trim:** Select one of the filters or lists from the drop-down list as a target in which to trim from. A contact list containing the contacts that are unique to the specified criteria is created.

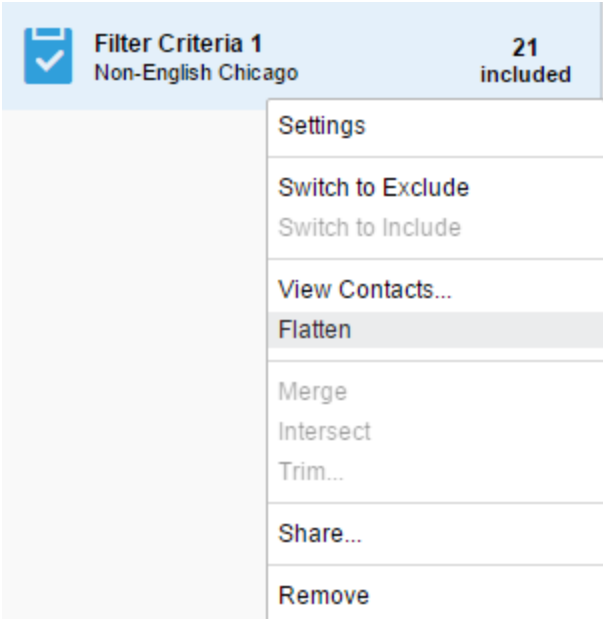
The selected filters and lists are combined into a new contact list. The original filters or lists remain unaffected.

5. Give the new contact a descriptive name or description by double-clicking it.
6. You can then [share the list](#) or [export it](#).

Examples



Flattening segment filters

You have a segment designed to include only non-English speaking contacts from Chicago. You want to include this segment in a campaign and but don't want to include any new contacts. You can convert this filter to a contact list by flattening it. As a contact list, this segment will no longer add new contacts.





Merging segment criteria

Your organization is broadening its market and needs to set up a contact list of non-English speaking contacts in Chicago and New York. In your segment, you have the flattened list of non-English speaking contacts from Chicago, and a filter that detects contacts who speak any language other than English in New York.

	Flattened List 1 Non-English Chicago	21 included
	Filter Criteria 1 Non-English New York	21 included

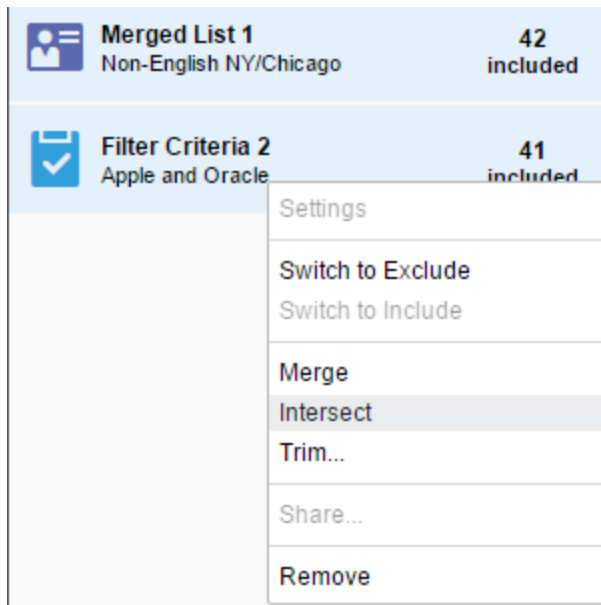
You now need to combine these cities into a single contact list. By merging the two criteria, you can create a contact list with all contacts from the filter and the existing list. Any duplicates are removed.

	Flattened List 1 Non-English Chicago	21 included
	Filter Criteria 1 Non-English New York	21 included

- Settings
- Switch to Exclude
- Switch to Include
- Merge**
- Intersect
- Trim...
- Share...
- Remove



Intersecting segment criteria

Your organization now needs to create a contact list for contacts who work for Apple or Oracle, in the list of non-English speaking contacts from Chicago and New York you created earlier. Create a filter for the two companies and use the intersect operation with the contact list to determine which contacts are in both criteria. This method is especially effective if you have more companies you need to check for, as you can reuse the location criteria.




Trimming segment criteria

You instead need to create a contact list for non-English speaking contacts who do not work for Apple or Oracle, in Chicago and New York. With the previously created filter and list, use the trim operation to determine which contacts are uniquely in the location filter. This will provide you with a contact list of those contacts not employed by Apple or Oracle, in Chicago and New York.


	Merged List 1 Non-English NY/Chicago	42 included
	Filter Criteria 2 Apple and Oracle	41 included
		Settings
		Switch to Exclude
		Switch to Include
		Merge
		Intersect
		Trim...
		Share...
		Remove

Excluding segment criteria


When you add a contact list or segment filter to a segment, the contacts in that list are included in the segment by default. However, you can also use contact lists and segment filters to *exclude* contacts.

 **Example:** You could choose to exclude people who opened an email in the last week from a segment that focuses on re-engagement. Or, you might want to exclude contacts who work for one of your competitors.

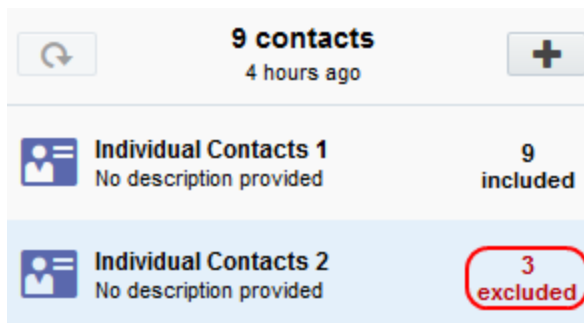
Using the segment editor, you can easily toggle filters and lists to specify inclusion or exclusion. You can [view excluded contacts](#) in the contact viewer.

 **Important:** When you filter by activities, it typically looks at the past 1 year's data. However, for Subscription and Bounceback activities, it can search up to 10 years. For instance, if you filter for activities before May 15, 2019, it will only search from May 14, 2018, to May 14, 2019. Additionally, the filter can't look back more than two years from today's date. So, if today is March 18, 2019, and you filter for activities before April 22, 2007, the system will only search from March 18, 2017, to March 18, 2018. Also, the system won't show clicks or opens for emails sent more than 760 days ago.

To exclude the contacts in a segment filter or list:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. In the left pane, right-click the segment criteria, then click **Switch to Exclude**.

The segment or list indicates how many contacts are now excluded.




4. Click **Save**.

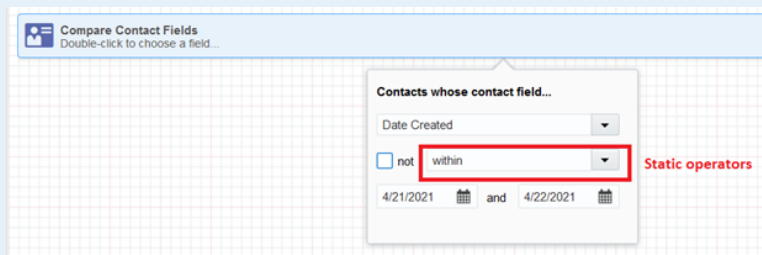
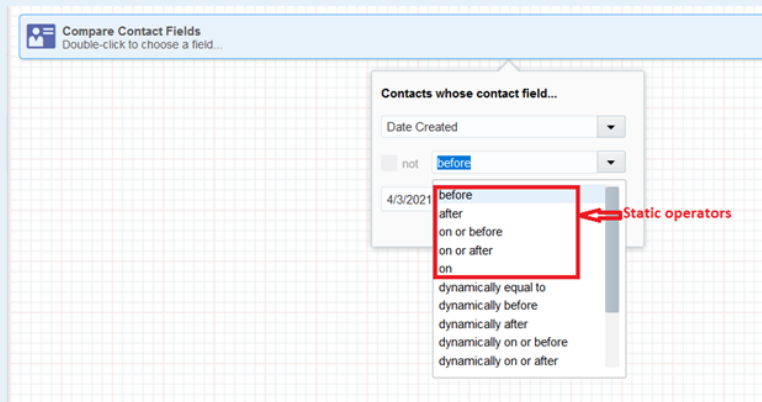
Sharing filters and lists

Sharing a filter or list makes it available to other users in Oracle Eloqua. Shared filters and lists can easily be combined and reused to build the target segments you need for your marketing campaigns.


Good to know

- Existing Oracle Eloqua customers can have the option to enable Segment Configuration for TimeZone. This feature evaluates date/time field filters in the executing user's timezone. Previously, all filtering was based on Eastern Standard Time (UTC -5:00).
- To enable Segment Configuration for TimeZone, log a service request with [My Oracle Support](#). Once you enable this feature, it cannot be reversed.
- Newly provisioned Oracle Eloqua instances will have Segment Configuration for TimeZone enabled by default.
- Filter operators are divided into two categories: Static Operators (before, after, on or before, on or after, on, within) and Dynamic Operators (dynamically equal to, dynamically before, dynamically after, dynamically on or before, dynamically on or after, within the last, within the next).
- If Segment Configuration for TimeZone is enabled, Static Operators will use the filter creator's time zone to convert criteria and store it in the database. Segment filter execution is based on these database values, which are already converted into Eastern Standard Time (EST). No Conversion is done during execution.

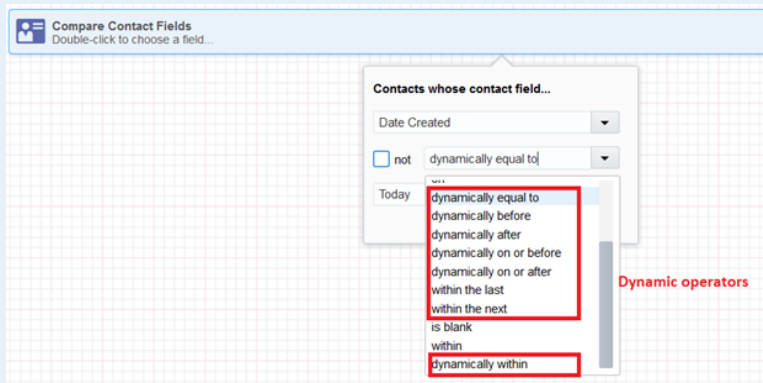
 **Example:** A contact's *DateCreated* operator is before 2021-04-03. If the user who created the filter is from Australian Eastern Standard Time (AEST), Oracle Eloqua converts the date entered from 2021-04-03 12:00:00 AM in AEST to 2021-04-02 9:00:00 AM in EST to store in the database. When executing the filter, the segment finds all contacts with the created date before 2021-04-02 9:00:00 in EST.




- If Segment Configuration for TimeZone is enabled, Dynamic Operators will use the executing user's time zone to calculate results.

 **Example:** A contact's *DateCreated* operator is **dynamically equal to** "today". If a user executing the filter is from AEST and "today" in AEST is 2021-04-22 5:00 AM, Oracle Eloqua finds all contacts with the created date 2021-04-22 in AEST, which is

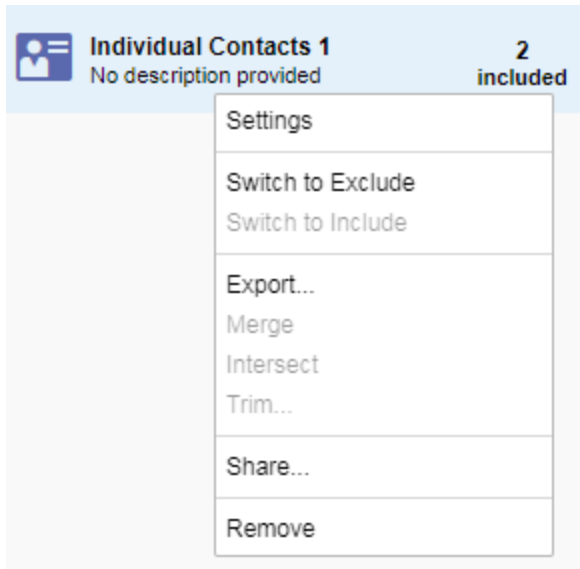
from 2021-04-21 10:00 AM to 2021-04-22 9:59:59 AM in EST. Conversion is done during filter execution with the executing user's time zone.



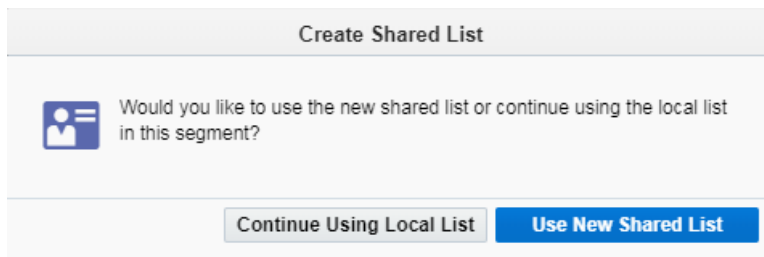
To share a list:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#). Make sure you save the segment before trying to share a list.

3. In the left pane, right-click the list that you want to share, then click **Share**.



4. Select an option from the **Create Shared List** dialog:




- a. **Continue Using Local List:** Oracle Eloqua creates a shared list where it copies the members from your local list. You will continue working in your local list. This operation is asynchronous; you will receive an email once the operation is complete. These lists can be used in programs and campaigns.
- b. **Use New Shared List:** Oracle Eloqua marks your list as shared. You will now be working within the shared list.

5. Type a name and description for the shared list and choose a folder to save it to. Click **Share**.

Share Filter






Share As:

Description:

Add To Folder:  /


◀ ▶

Name

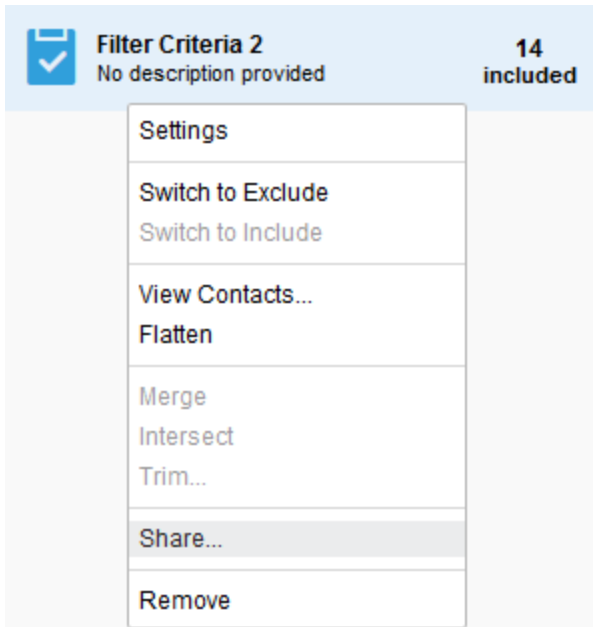
-  CRM Filters
-  Lead Scoring Filters
-  Lead Nurturing Filters
-  Integrated Sales and Marketing Funnel
-  Unfiled

6. Click **Save**.

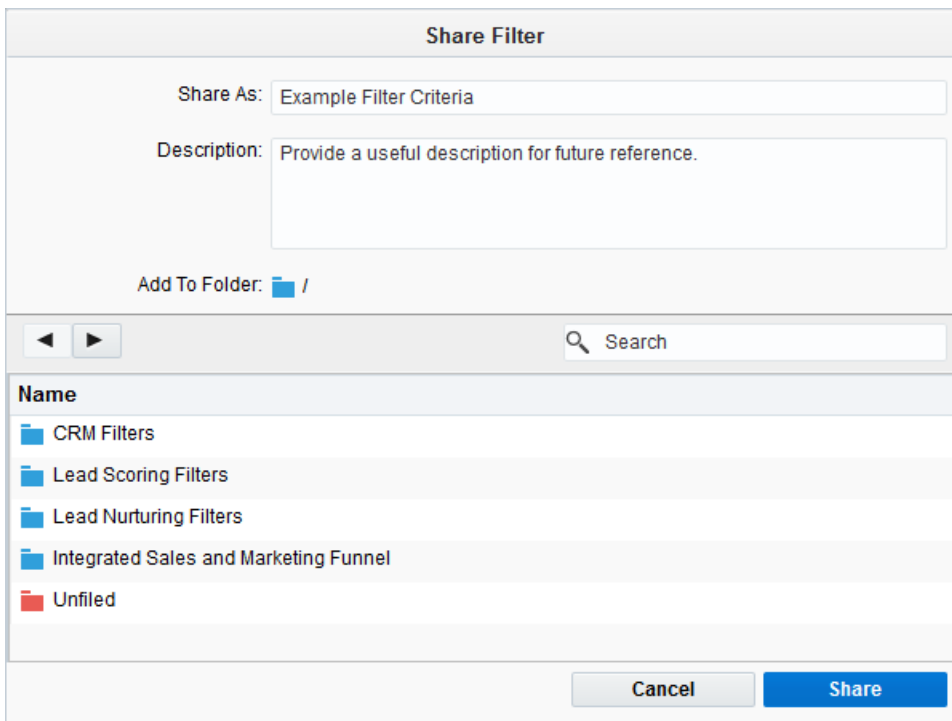
To share a filter:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#). Make sure you save the segment before trying to share a filter.

3. In the left pane, right-click the filter that you want to share, then click **Share**.



4. Type a name and description for the shared filter and choose a folder to save it to. Click **Share**.




5. After you share the filter, you are prompted to update the segment to use the new shared item or continue to use the original one. Choose an option and then click **Save**.

Viewing segment contacts

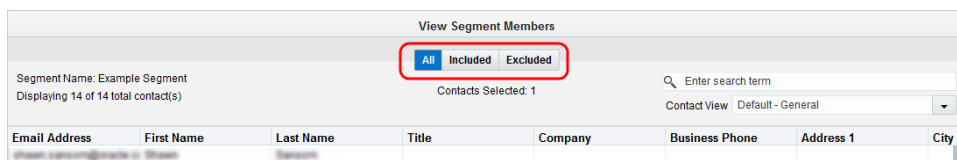
You can view the list of contacts that are included and excluded in your segment.

Note: Oracle Eloqua prompts you to refresh the segment if it has been more than 24 hours since refreshing the segment.


To view the contacts in a segment:

1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment, or [create a new one](#).
3. Click **View Contacts**.

The *View Segment Members* window opens. There are three tabs in this window:

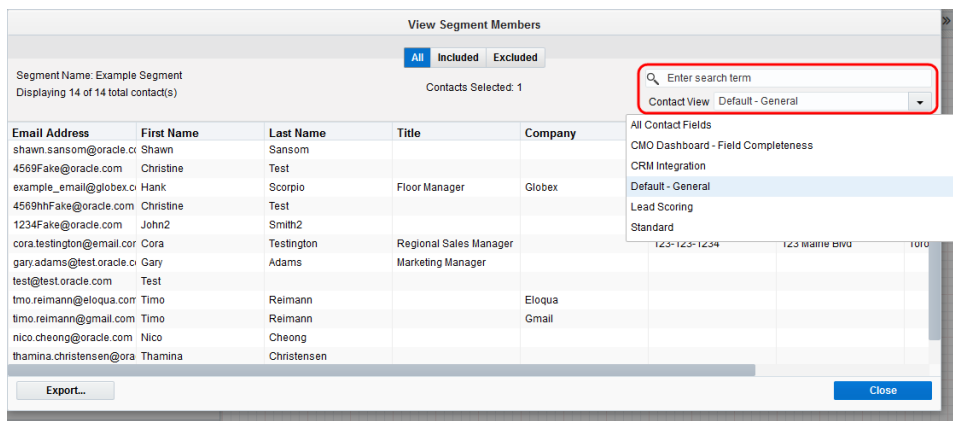


- **All:** This is the default tab, it lists all contacts that meet the segment's criteria.
- **Included:** This tab lists all contacts that are *included* by a segment's criteria.
- **Excluded:** This tab lists all contacts that are *excluded* by a segment's criteria.

 **Example:** Consider a segment that includes all contacts from Canada and excludes a small list of Canadian contacts: Charlotte Brown, Maxim Engel, Adela Kolodziej, and Huyen To. When viewing the segment contacts, the *All* tab would show the final results of the segment (that is, all contacts from Canada except for Charlotte, Maxim, Adela, and Huyen). The *Included* tab would show all the contacts from Canada (including Charlotte, Maxim, Adela, and Huyen). The *Excluded* tab would show the excluded contacts (Charlotte, Maxim, Adela, and Huyen).

4. Choose any additional options:

- To filter the results, use the *Search* field or select a *Contact View*.



View Segment Members

Segment Name: Example Segment
Displaying 14 of 14 total contact(s)

Contacts Selected: 1

Search: Enter search term
Contact View: Default - General

Email Address	First Name	Last Name	Title	Company
shawn.sansom@oracle.co	Shawn	Sansom		
4569Fake@oracle.com	Christine	Test		
example_email@globex.co	Hank	Scorpio	Floor Manager	Globex
4569hhFake@oracle.com	Christine	Test		
1234Fake@oracle.com	John2	Smith2		
cora.testington@email.co	Cora	Testington	Regional Sales Manager	
gary.adams@test.oracle.co	Gary	Adams	Marketing Manager	
test@test.oracle.com	Test			
tmo.reimann@eloqua.com	Timo	Reimann		Eloqua
timo.reimann@gmail.com	Timo	Reimann		Gmail
nico.cheong@oracle.com	Nico	Cheong		
thamina.christensen@ora	Thamina	Christensen		

Export... Close

- To export the segment contacts, click **Export**. See [Exporting segment contacts](#) for more information.


You can also view segment members in a campaign or program. See [Viewing segment members in campaigns and programs](#) for more information.

Exporting segment contacts

You can export segment contacts to an export file that you can download. For example, you could use the export to later update contacts in bulk or download the export file for use by other systems at your organization.

🕒 **Tip:** To schedule an export or to store the export file on an SSH File Transfer Protocol (SFTP) server, you can use the data export tool. See [Exporting contacts or accounts](#) for more information.


To export a segment:

1. Navigate to **Audience** , then click **Segments**.
2. [Create a segment](#) with the contacts that you want to export.
3. Click **View Contacts**.

The *View Segment Members* window opens.

📌 **Note:** You are prompted to refresh the segment if more than 24 hours has passed since the last time the segment was evaluated.

4. If applicable, change the *Contact View* to ensure you are exporting the contact fields you want.
5. Click **Export**.

 Enter your Email Address and configuration details below. We will send you an email containing a link to the exported data.

Email Address:

Export Fields: Current view fields
 All contact fields

Export Format: Comma-Separated Value (.csv)
 Microsoft Excel (.xls)

6. Configure the export window and click **Export**.

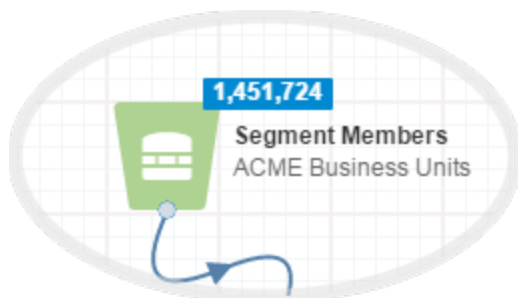
A link to download the export data will be sent to the specified email address. The export is available from that link for 14 days.

Tracking segment members in campaigns or programs

From the program canvas or campaign canvas, you can view the contacts that entered a campaign or program from a segment or view all the contacts that entered the campaign or program from a segment.

When a campaign or program is in the *Draft* or *Scheduled* state, you can see the number of contacts that are currently in that segment.

The number of contacts is taken from the latest successful calculation of the segment's count by the same user. The segment's count recalculation can be triggered either explicitly by pressing *Refresh Count* or saving the segment. If a segment is used in campaign or program, ensure the segment is saved and the new count displayed after any changes to segment structure. Otherwise the number of contacts displayed on campaign or program can be outdated (for example, showing the number before the changes).

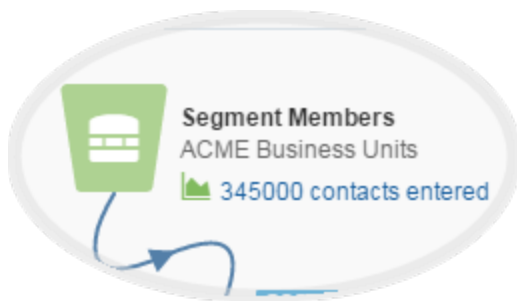


Before you activate a campaign or

program, this segment count can change if the number of contacts in the segment changes.

- To see the latest contact count, refresh the canvas or open it again.

When a campaign or program is *Active* you can see how many segment members have entered the segment step so far. This number is different than the total segment count you saw earlier in the *Draft* state. As more contacts flow from the segment through the workflow, the segment count changes.



- To see the latest contact count, refresh the canvas or open it again.
- To view details about the contacts that entered the step, double-click the segment count link. See [Viewing the segment members that entered a campaign or program](#) for more information.

When a campaign is *Active* and contacts begin moving through the campaign or program workflow, you can see the number of contacts that are resting or being processed in each step. The count changes in real-time as contacts move through the step.



- To see the latest contact count, refresh the canvas or open it again.

- To view details about the contacts in the step, double-click the contact count. See [Viewing the step members report](#) for more information.

Viewing segment members in campaigns and programs

While your campaign or program is in a DRAFT state, you can view the contacts that are included in or excluded from a segment.

To view segment members in a campaign or program:

1. Open a campaign or program.
2. Double-click the contact count on the step.



The *View Segment Members* window opens, and displays a list of contacts currently in the segment.

View Segment Members

Segment Name: ACME Business Units
 Displaying 200 of 1,451,725 included contact(s)
 Contacts Selected: 1

Contact View: General Contact Fields

Email Address	First Name	Last Name	Title	Business Phone	Address 1	City	Industry
adam.cusson@	Adam	Cusson	Test				Please Sele
MaMecco@e11	Mary	Mecco	Support Analyst				Please Sele
bilalx.sheikh@	Bilal	Sheikh	Sometitle			Toronto	Please Sele
donchoa_reg_	Charles	Yang	Software Maker				Please Sele
donchoa_reg_	Charles	Yang	Software Maker				Please Sele
boyuan.zhang	Boyuan	Zhang	Software Developer				Please Sele
donchoa@gm	Charles	Yang	Soft ware Maker				Please Sele
bluejays@worl	Maybe	Next Year	Sigh			Toronto	Please Sele
shuai.x.zhang@	shuaitestA	Zhang	shuaitestA				Please Sele
sean.eidemille	Sean	Eidemiller	Senior Software Engineer				Please Sele
andrew.deck@	Andrew	Deck	Senior Software Develop	a	翻	Culpeper	Please Sele
stephen.streich	stephen	streich	senior director			Toronto	Please Sele
юзеп@екзамн	dfgfsdg	sdfsdfsd	sdfsdf				Please Sele
түү@шэрт	dfgfsdg	sdfsdf	sdfsdf				Please Sele

There are two tabs in the report:

- **Included:** Contacts in this list can enter the campaign or program.
- **Excluded:** Contacts in this list cannot enter the campaign or program from this segment.

3. To download the report to a .csv or Microsoft Excel file, click **Export**. A link to the export file is emailed.

After the campaign or program is active, and contacts begin to move from the segment into subsequent steps, you will not be able to open this report. You can use the [segment members step entry report](#) to view the contacts that have entered the step so far.

Viewing the segment members that entered a campaign or program

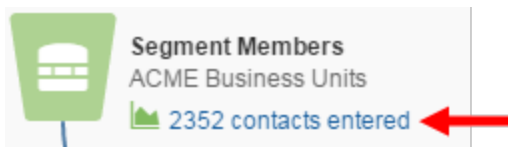
If contacts enter your campaign or program through a segment, you can view the segment members that entered so far. The report details information about the

contact and how they entered the campaign.

⚠ Important: You can only report on the last three months of campaign or program data. You can only view the report for Active campaigns. You can use operations reports or Insight for more information about a completed campaign.

To view the Segment Members report:

1. In the campaign canvas or program canvas, double-click the link in the segment step.



The report opens.

Evaluation period:		Step: Segment Members		Displaying 200 of 1,110,000 total		
Entry Date	First Name	Last Name	Campaign Step Name	Entry Type	Campaign Step Type	Email Ad
10/23/2016 8:29 PM	Josefina	Dant	Segment Members	Added from Segment	Segment Members	Josefine
10/23/2016 8:29 PM	Ignacia	Cracraft	Segment Members	Added from Segment	Segment Members	Ignacio.
10/23/2016 8:29 PM	Hyacinth	Cowling	Segment Members	Added from Segment	Segment Members	Hye.Co
10/23/2016 8:29 PM	Calista	Bule	Segment Members	Added from Segment	Segment Members	Callie.B
10/23/2016 8:29 PM	Willard	Boatner	Segment Members	Added from Segment	Segment Members	Willena.
10/23/2016 8:29 PM	Mina	Ackley	Segment Members	Added from Segment	Segment Members	Minda.A
10/23/2016 8:29 PM	Lolita	Willhite	Segment Members	Added from Segment	Segment Members	Loma.W
10/23/2016 8:29 PM	Janita	Vance	Segment Members	Added from Segment	Segment Members	Jann.Va
10/23/2016 8:29 PM	Francesco	Tilman	Segment Members	Added from Segment	Segment Members	Franche
10/23/2016 8:29 PM	Emily	Tedeschi	Segment Members	Added from Segment	Segment Members	Emma.T
10/23/2016 8:29 PM	Dawna	Strachan	Segment Members	Added from Segment	Segment Members	Dawne.
10/23/2016 8:29 PM	Dakota	Stinnett	Segment Members	Added from Segment	Segment Members	Dale.Sti
10/23/2016 8:29 PM	Amira	Sher	Segment Members	Added from Segment	Segment Members	Ammie.:
10/23/2016 8:29 PM	Virgilio	Schock	Segment Members	Added from Segment	Segment Members	Virginia.
10/23/2016 8:29 PM	Torie	Sartin	Segment Members	Added from Segment	Segment Members	Torri.Sa
10/23/2016 8:29 PM	Philip	Redd	Segment Members	Added from Segment	Segment Members	Phillip.F
10/23/2016 8:29 PM	Odelia	Ranallo	Segment Members	Added from Segment	Segment Members	Odell.R:
10/23/2016 8:29 PM	Merlene	Prentiss	Segment Members	Added from Segment	Segment Members	Merlin.F
10/23/2016 8:29 PM	Iris	Nalley	Segment Members	Added from Segment	Segment Members	Irish.Na

Note: The hyperlinked number reflects the number of contacts that have entered the program at the time of opening or refreshing your campaign or program. This number may change if you re-open or refresh again.

2. To change the report time frame, click an option from the **Evaluation period** drop-down list.
3. To refresh the report, click **Refresh**.


Customizing segment permissions

After creating a segment, the creator has full permission to the segment. The creator or an administrator can customize who can view, edit, or delete an individual segment. Customizing the segment permissions does not change the permissions of any shared filters or lists in the segment. Shared filters and lists have their own permissions.






Note: Administrators set default asset permissions. Customizing a segment's permissions override those defaults.



- **View:** Allows for searching for and viewing the asset.
- **Edit:** Allows for changing the asset.
- **Delete:** Allows for deleting the asset.
- **Set Security:** Allows for changing the permissions for the asset.

To customize segment permissions:



1. Navigate to **Audience** , then click **Segments**.
2. Open an existing segment.

3. Click **Actions**, then click **Permissions**.

Asset Permissions				
Specify users or security groups and what level of access they will have to this asset				
User/Group	View	Edit	Delete	Set Security
 Active Users - Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Advanced Users - Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Alexa Kalapaca	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Basic Users - Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Customer Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

  Cancel Save

4. Do one of the following:

- To add a user or user group to the list, click **Add** .
- To remove a user or user group, click the user or group and click **Delete** .

5. Select the check boxes to set the permissions for the user or user group.


6. Click **Save**.

Deleting segments

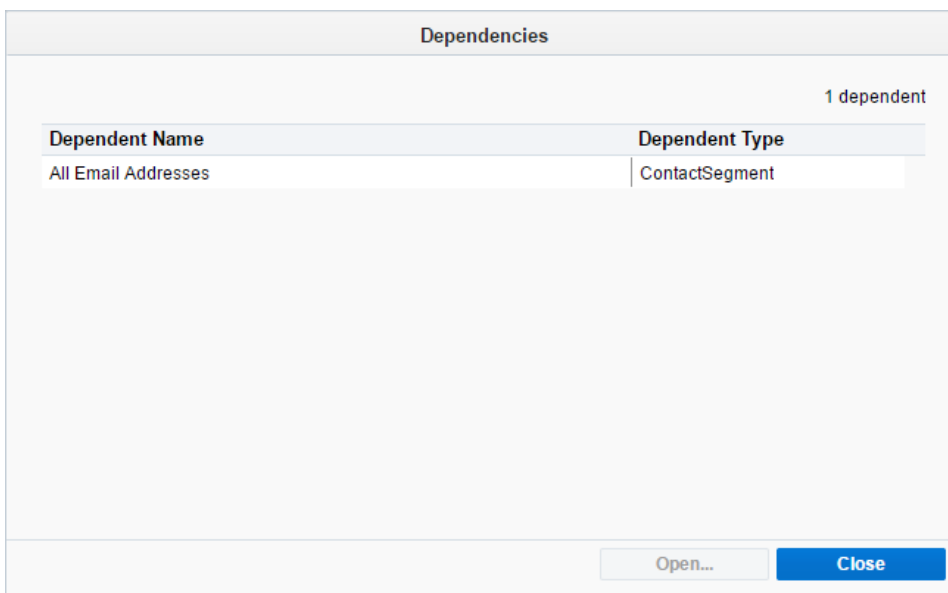
You must resolve all dependencies before you can delete a segment. A dependency is created when the segment is used by another area of Oracle Eloqua like a campaign, segment, program, and so on.

Deleting a segment will not delete any shared filters or lists. Quicklists are deleted when you delete a segment.

To view dependencies:

1. Navigate to **Audience** , then click **Segments**.
2. Open the segment.
3. Click **Actions**, then click **View Dependencies**.


Oracle Eloqua displays the dependencies.



Dependencies	
1 dependent	
Dependent Name	Dependent Type
All Email Addresses	ContactSegment

4. To view the dependency, double-click it in the list.

To delete a segment:

1. Navigate to **Audience** , then click **Segments**.
2. Locate the segment you want to delete.
3. Right-click the segment and click **Delete**.