XMPIE® PersonalEffect®

uProduce™ Marketing Console User Guide

Version 2.8.1

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Notices

U.S. Patent 6948115, 7406194, 7548338, 7757169 and pending patents.

JP Patent 4406364B and pending patents.

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For information, contact XMPie Inc.

485 Lexington Avenue

10th. Floor

New York, NY 10017

More information can be found at www.xmpie.com

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Preface

Welcome to uProduce™ Marketing Console–XMPie® revolutionary software solution for refining Campaign performance. Marketing Console provides sophisticated real-time tools for measuring the success of a marketing Campaign, based on Campaign variables (ADOR Objects), Cross Media events and actions. With the XMPie solution, organizations can *track* cross-media Campaign activities and save them into a consolidated database; *analyze* the tracked information in real-time, using a Web-based console; and then *refine*, optimize and enhance the current or next phases of the Campaign accordingly. The analysis and refinement steps, geared to enhance response rate and ROI, can be done by the service provider as well as its customers.

This guide explains how to set your existing XMPie environment (uProduce™ and uCreate™ XM) to track Campaign events, and how to install and configure Marketing Console to view and analyze these tracked events.

Audience

This guide is intended for service provider marketing analysts, end-customer marketing analysts and marketing executives, who need to analyze their marketing campaigns.

These different users may have different analysis requirements: marketing analysts may need state-of-the-art reporting capabilities, featuring maximum flexibility and complexity; while marketing executives may prefer a user-friendly sub-set of these capabilities, with the option to switch to the advanced feature set.

Document Conventions

This document uses the following typographical conventions:

- A backslash (\) is used to separate directories in a path.
- Bold Tahoma font is used to indicate on-screen interaction elements, including window captions, buttons, fields, check boxes, selection lists, and so forth.
- Italics are used to emphasize important terms and concepts.
- The courier font is used for sample code and code listings.
- The “Take Note” icon () is used to ensure useful information, clarifications and tips are noticed.
- The “Professional” icon () is used to indicate Professional Service Level features, available exclusively with the PE Analytics Premier and Signature Editions.

Screen Captures & Instructions

Although every attempt has been made to present up-to-date information, some windows displayed in this guide may have already undergone slight modifications.

In addition, you may find differences between the instructions and windows presented here for different versions of the Windows Server, as well as different Editions and Service Levels of Marketing Console.

Contacting XMPie

XMPie is the leading solutions provider for cross-media dynamic publishing - an essential and growing segment of the CRM and Marketing Automation market. XMPie software enables enterprises and their marketing service providers to efficiently develop and execute highly customized, information driven, cross-media campaigns. With XMPie, effective personalized communication becomes not only a high response rate proposition, but also a cost-effective business strategy with attractive ROI. For further information, you can contact XMPie, using the details listed here.

Email: support@xmpie.com   Web site: www.xmpie.com

Chapter 1: Introduction

The Need for Integrated Marketing Services with Measurable Results

Today's marketing campaigns are increasingly more sophisticated and complex. They typically cross the boundaries of multiple channels and multiple media (print, email, web, phone calls, text messages etc.), and span over multiple phases (for example, test campaigns, promotional postcards, follow-up email or postcards, personalized web pages etc.). This complexity makes it extremely difficult to understand campaign results, whether you are a marketing executive, a marketing service provider or a print service provider.

The need to understand campaign results is a top priority for marketers, who are expected to constantly improve their campaign's performance. This requires complete visibility and effective analysis of the tracked data, taking place in real time:

- To gain complete visibility into results, you need a tracking and monitoring solution that allows you to look across all the results of your campaign in a holistic manner.
- To analyze the results for maximum effectiveness, you need a powerful reporting solution that integrates results into high-quality, meaningful data,
- To keep getting better results, the tracking and analysis must take place in real-time, while the campaign is still in progress and its results can still be changed. The required solution should allow you to immediately use your conclusions to refine the campaign's relevancy and improve its performance.
- To better understand how you are performing against your objectives, you need a solution that lets you monitor key performance indicators (KPIs).

Another critical issue for marketers is the ability to measure the value of marketing. Marketers are under great pressure to justify marketing expenses, so the campaign results must be defined in terms of identifiable ROI. This requires a solution that turns the art of marketing into science, enabling you to accurately track, monitor, analyze and measure campaign results. All campaign results (whether they relate to Touchpoints, media, campaign phases etc.) must be measurable; and the measuring must be performed in a single, integrated and comprehensive environment, with very little setup.

Print service providers, who are steadily expanding to marketing services, need a solution that would help them take over this new line of business. In this case, the challenge is to offer a holistic set of marketing services, of which print is an element, integrated in a way that is meaningful from the marketing viewpoint.

To address these issues, you need an effective, all-inclusive marketing solution, which can provide integrated marketing services, accurately measure campaign results, and generate useful, real-time data.

The Tracking & Marketing Console Solution

The Tracking & Marketing Console leverages XMPie cross-media dynamic publishing solution, and enhances it with marketing-focused features. This out-of-the-box solution for publishing, interaction and marketing serves as a "Marketing Dashboard", allowing you to look across all media in your campaign in an integrated manner.

The key features of the Tracking and Marketing Console are tracking, reporting and analyzing, and refining campaign performance:

- **Tracking**—record data from campaigns, including campaign events, Content Objects (also known as ADOR Objects[1]), Touchpoints, Recipient-Attributes and Event-Attributes, for all phases of a cross media campaign. Note that in addition to typically tracked event-related information (for example, website page visits and their clients’ IP addresses), this tracking module also records campaign-specific information, per-individual, per-event (for example, print events, web page button clicks, ADOR Object values and browser information per-individual).
- **Reporting & Analyzing**—test and measure results to better understand customer behavior and maximize campaign effectiveness. The campaign metrics are provided in the form of visually rich, up-to-the-minute reports, allowing you to filter any segment of the population by diverse attributes (for example, Recipient-Attributes, such as gender, city or preferred promotional offer; or Event-Attributes, such as individuals who entered the website or individuals who made a purchase).

  You can run one of the user-friendly, predefined reports, which answer common questions (for example, how many people landed on the website); or easily define custom reports that address your specific interests, save them and reuse them as needed. Each report may be used to examine a specific population, or conveniently compare two populations.

  This analysis helps you understand your campaign results, for example: find out who responded; or determine which offers, tactics, creative designs and media were most attractive. Reports of interest, which are checked on a regular basis, may be added to a special Dashboard page. The Dashboard shows multiple report results on the same page, providing a live summary view of the campaign status.

[1] ADOR stands for Automatic Dynamic-Object Replacement.

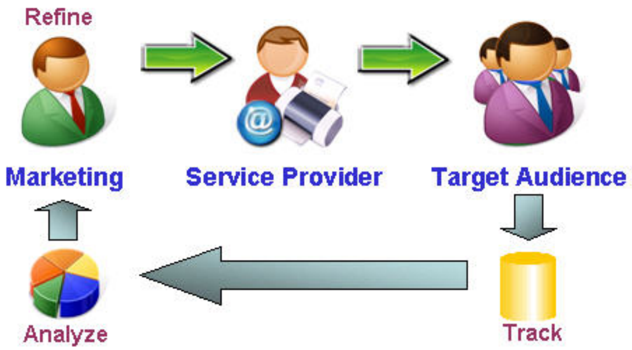
To evaluate the campaign success compared to its objectives, you can run one of the pre-defined KPI reports that come with a set of preset ranges for each type of performance metric.

- **Refining** — use the campaign analysis to refine the next campaign wave, thereby improving accuracy, relevancy and results. For example, use the Tracking & Marketing Console to compare and rank pilot marketing campaigns before going large scale (A/B marketing).

Figure 1 shows how the Tracking and Marketing Console closes the feedback loop: the campaign data flow from the marketer through the service provider and up to the target audience. All communications are tracked and saved to the database, whether they are outbound marketing Touchpoints or inbound recipient responses. The tracked data are presented in Marketing Console in the form of reports, and analyzed to better understand customer behavior. These findings allow the campaign planner to refine the next communication with recipients and significantly improve the campaign performance.

Note: *Tracking may be performed independently of Marketing Console. The data tracked by uProduce may be analyzed using the solution of your choice – whether you are using Marketing Console, or your own custom solution, built on top of the XMPie Tracking database (note that creating such a custom solution requires significant SQL and database know-how).*

Figure 1: The Tracking & uProduce — Marketing Console Solution



Marketing Console Overview

Different types of users have different analysis requirements. In general, service providers require state-of-the-art reporting capabilities, featuring maximum flexibility and complexity, to pre-generate reports for their customers (usually marketing executives). Marketing executives, on the other hand, require a user-friendly sub-set of these capabilities. Service providers also need to control the extent and the quality of the service, i.e. the **Service Level**, which they offer each customer in each marketing campaign. For example, a service provider may offer most customers a basic Service Level, featuring standard reports that cannot be modified; while premium-paying customers launching high-profile campaigns are offered a superior Service Level, which grants them visually-rich reports and editing permissions.

Marketing Console is designed to address the needs of these different users:
it distinguishes between the analysis requirements of service provides and those of their customers, and allows service providers to control the Service Level they offer each customer.

Editions and Service Levels

Marketing Console is available in three **Editions**: Express, Signature or Premier. These Editions feature the same general reports, and grant service providers full access to the product's analysis capabilities; the main difference is in the Service Level offered to customers:

- **Express Edition**—offers end customers a *Standard* Service Level, with a view-only permission to run custom reports, defined especially for them by the service provider.
- **Signature Edition**—allows service providers to control the Service Level per-end-customer and per-campaign, by choosing between two Service Levels: *Standard* or *Professiona*l. The Professional Service Level is characterized by enhanced charts (see "PE Analytics Licenses" section in the *uProduce Marketing Console Administrator's Guide*) and gives end-customers full permissions to view, edit and create reports.
- **Premier Edition** —includes additional enhanced features on top of those offered by the Signature Edition: branding per-end-customer (per account), access to the Marketing Console application for iPhone and the Tracking API.

User Roles

All uProduce users who have access to tracked campaigns are automatically defined as Marketing Console users. Each user is assigned one of the following roles:

- **Administrator (admin)**—a system manager who works for the service provider (an internal user). The admin is a fixed user, whose role cannot be changed, and is automatically assigned to the uProduce administrator. The admin controls the Service Levels (Standard or Professional) of all campaigns and the roles (Analyst or Operator) of all users in the entire system.

- **Operator**—a marketing analytics professional who works for the service provider (an internal user). The Operator edits and creates custom reports that are mainly intended for Analysts, and needs to test these reports in the Analyst's environment (i.e. Service Level). In addition to switching between Service Levels, the Operator may be given permission to view all campaigns (thereby overriding this user's uProduce permissions).
- **Analyst**—a marketing analytics professional, who either works for the service provider (an internal user), or is a customer of the service provider (an external user). This is the default role given to all non-administrator uProduce users. Analysts run custom reports, defined especially for them by the service provider's Operator, or create their own reports.

User roles are discussed in detail in Chapter 3: Getting Started with Marketing Console (see User Roles on page 29).

The differences between the Express, Signature and Premier Editions are summarized in Table 1 below.

Table 1: Express, Signature and. Premier Editions - Features

<table>
<tr><th>Feature</th><th>Express Edition</th><th>Signature Edition</th><th>Premier Edition</th></tr>
<tr><td>Operator Report Permission</td><td colspan="3">View/Create/Edit</td></tr>
<tr><td>Analyst Report Permission</td><td>View</td><td colspan="2">• Standard Service Level: View
• Professional Service Level: View/Create/Edit</td></tr>
<tr><td>Operator Account Permission</td><td>All Accounts</td><td colspan="2">Configurable by administrator:
• All Accounts
OR
• According to uProduce user rights</td></tr>
<tr><td>Analyst Account Permission</td><td colspan="3">According to uProduce user rights</td></tr>
<tr><td>Chart Format</td><td>Simple Charts</td><td colspan="2">• Standard Service Level: Simple Charts
• Professional Service Level: Enhanced Charts</td></tr>
<tr><td>Branding per-Customer Account</td><td colspan="2">No</td><td>Yes</td></tr>
<tr><td>Mobile Application</td><td colspan="2">No</td><td>Yes</td></tr>
<tr><td>API</td><td>Yes</td><td>No</td><td>Yes</td></tr>
</table>

Workflow

Working with the Tracking and Marketing Console consists of two main tasks:

1. *Tracking*—Setup the objects to be tracked:
   - Configure tracking by setting up a list of Content Object (ADOR Object) values to be tracked—via the uProduce Dashboard.
   - Activate tracking for relevant Jobs—via the uProduce Dashboard.
   - Mark web events or web actions to track—via uCreate XM.

   This task is described in Chapter 2: Tracking Campaign Events in uProduce and uCreate XM.
2. *Reporting & Analyzing*— Generate visually rich, up-to-the-minute reports on the fly:
   - Log into Marketing Console via the Internet (or the company's intranet).
   - Analyze the data by creating population filters and running reports.
   - Manage reports:
     - Add frequently used reports to the Dashboard
     - Customize general reports and save them for future use
     - Export reports to Excel or to PDF

   This task is described in Chapter 3: Getting Started with Marketing Console.

When you are done, take the results of the campaign analysis, and use them to *refine* the targeting and personalization in the next phase, constantly improving your campaign's relevancy, performance and overall results.

Chapter 2: Tracking Campaign Events in uProduce and uCreate XM

To view and analyze Campaign performance using Marketing Console, you must first track Campaign information.

Note: *Accounts and Campaigns that do not have tracking information are not shown in Marketing Console.*

In the context of XMPie PersonalEffect technology, *tracking* is the process of recording events that occur and data that are produced during the campaign lifetime. Once you configure the campaign tracking, tracked events are saved to the Tracking Database (`XMPDBTracking`) and you can access this information via Marketing Console.

What are Campaign Events?

A Campaign *event* (event, in short) is the occurrence of an Action relating to the Campaign, such as printing a postcard; sending a follow-up email; visiting a web page; clicking a web page button, etc.

An event has *attributes* that define its details, such as the event type (print, email or web) and the different properties associated with the event: a recipient, an IP address, a web-page etc.

An event is recorded per-recipient, for example: a single print job for 100 recipients will yield 100 print events, one for each recipient.

Event-Types Available for Tracking

uProduce can track the following types of events:

Media	Event Type	Description
Print	Printed	uProduce has generated the print piece.
Email	Email Sent	An email has been sent using uProduce (for example, via SMTP, ExactTarget).
Web	Website Visit	A recipient has browsed to any of the specified website pages.
	Page Visit	A recipient has browsed to the specified website page.
	Navigated	• A user has navigated away from the specified website.

Media	Event Type	Description
Web (Cont.)	Performed Action	An action has been performed. This includes: • Clicking a web page button • Changing the selection in a drop-down list or a radio button group • Modifying a text box
Any	Custom Event	Obsolete; use the *User-Defined* event type instead.
	User-Defined	A user-defined event type, used to record any event generated by an external system. You may add as many event types as needed. The event type ID must be in the range of 10,000-19,999. When generating reports, records containing this event type may be filtered using the **Other** Event Condition (see Other Condition on page 95).

Defining Events as Touchpoints

From the marketing perspective, Campaign events are meaningful when one or more events are associated with a *Touchpoint*.

“Touchpoint” is a term taken from the business domain. It is the action of interacting with recipients. Example Touchpoints may be “Initial Postcard Mailing” Printed and “Follow-Up” Email-Sent. In these examples, the Touchpoints are “Initial Postcard Mailing” and “Follow-Up”, and they are associated with the “Printed” and “Email-Sent” event-types (respectively).

The same event-type (for example, “Printed”) may be associated with different Touchpoints (for example, “Initial Postcard Mailing” and “Thank You Card”). When filtering data, you can use these Touchpoints to distinguish between otherwise-similar events (for example, distinguish between the “Initial Postcard Mailing” Printed event and the “Thanks You Card” Printed event).

A Touchpoint may consist of a single event per-recipient (for example, “Initial Postcard Mailing” Printed); or of multiple events per-recipient (for example, “Follow-Up” Email-Sent; and “Follow-Up” Email Opened[2]”).

The Tracking and Marketing Console gives you the ability to track and analyze every single Touchpoint in your Campaign, by associating it with one or more Campaign *events*.

Touchpoint events are defined and marked for tracking via the uProduce Dashboard. The following sections explain how to track different types of events.

[2] “Email-Opened” is an example of an event that can be generated by an external system.

How are Events Tracked?

Campaign events generated by the uProduce Server are inherently associated with *jobs*:

- Print events (for example, "Printed") are associated with Print jobs
- Email events (for example, "Email Sent'') are associated with Email Activity jobs
- Web events (for example, "Website Visited") are associated with Port jobs

The uProduce Server tracks events based on the job they are associated with.
This requires two basic operations, configuration and activation:

1. *Configuration*—define the specific events to be recorded, once tracking is activated:
   - Events relating to *ADOR Objects* (variable objects) are configured via the **uProduce Dashboard** (see Configuring on page 12).
   - Events relating to the *web* (page visits, button clicks etc.) are configured via **uCreate XM** (see Configuring Tracking in uCreate on page 20).
2. *Activation*—activates tracking per-job, through the relevant job definition in the uProduce Dashboard (see Activating Tracking via uProduce Job Definitions on page 25).

***Note:** To track any event, regardless of your specific tracking configuration, you must activate tracking.*

Configuring Tracking in uProduce

The tracking capabilities of the uProduce Dashboard include:

- Configuring a List of Tracked ADOR Object Values (page 13).
- Configuring Touchpoints and Associating Them with Jobs(page 17).
- Using the Job Center to View Tracking Details and Associate Jobs with Touchpoints (page 19).

Configuring a List of Tracked ADOR Object Values

Tracking is configured in the uProduce Dashboard by setting up a list of ADOR Objects, whose values are to be tracked (the **Track ADOR Values** list). Tracking is supported for all types of ADOR Objects, except for Table ADOR Objects.

Note: *To implement this tracking configuration, tracking must be activated per-job (see* *Activating Tracking via uProduce Job Definitions on page 25**).*

When configuring the **Track ADOR Values** list, you need to consider which ADOR Objects will be useful to analyze the Campaign performance, add them list and exclude the rest. This is especially important when your Campaign includes multiple ADOR Objects or particularly heavy ones (such as uImage ADOR Objects). The **Track ADOR Values** list allows you to create a configuration that ensures the required information is recorded, while minimizing the system load and improving performance.

The **Track ADOR Values** list serves as the Campaign's default tracking configuration. It is intended to be used as-is, but may be updated when necessary. ADOR Object values that are added or removed from this list during the Campaign's lifetime (i.e. values that do not exist for all Campaign jobs) are called "Partial attributes". Partial attributes are indicated in the Marketing Console's drop-down lists by the suffix "(Partial)", for example: "City (ADOR) (Partial)". Using Partial attributes in your analysis might lead to inaccurate results.

Note: *It is highly recommended to configure the Tracked ADOR Object values list only once, before any job is submitted, to avoid creating Partial attributes.*

The **Track ADOR Values** list may be accessed in two ways:

- At the Campaign-level, through the **Tracking** branch of the Campaign tree—it is recommended that you configure the list here, and then easily enable or disable it per-job.
- At the job-level, through the job definition's **Tracking** section, which is common to the **Process** page, the **Send Email Activity** page and the **Create Port for** Campaign page—it is recommended to enable or disable the existing list, without changing it, to avoid Partial attributes. However, when necessary, you may also configure the list here.

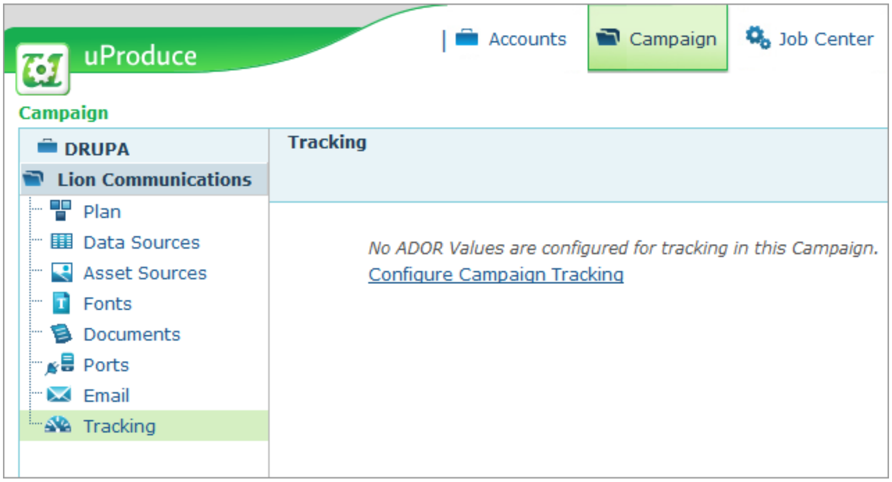
Changes to this list (whether they are made at the Campaign level or at the job level) affect the entire Campaign, including all ports, existing (running) jobs and future jobs.

The following procedure explains how to create the **Track ADOR Values** list at the Campaign level, through the **Tracking** branch of the Campaign tree. The same instructions apply when you access this list at the job level through the job definition (see Configuring Tracking via uProduce Job Definitions (Print, Email and Port) on page 26).

To configure the Track ADOR Values list (accessed from the Campaign tree):

1. In the uProduce Dashboard, open your Campaign and select the **Tracking** branch of the Campaign tree (Figure 2).

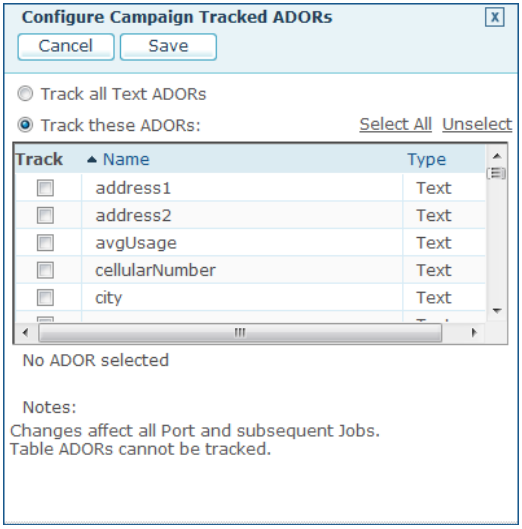
Figure 2: uProduce Dashboard Campaign Tree



2. In the **Tracking** page, click the **Configure Campaign Tracking** link.

   The **Configure Campaign Tracked ADORs** window is displayed, listing all the Campaign's ADOR Objects by their **Name** and their **Type** (Figure 3).

Figure 3: Configure Campaign—Tracked ADORs window



Note: *ADOR Objects whose permission in the Plan file is "write-only" are always tracked, so they appear checked and disabled.*

3. Go over the list, and check the **Track** check box of ADOR Objects whose values are to be saved to the database:

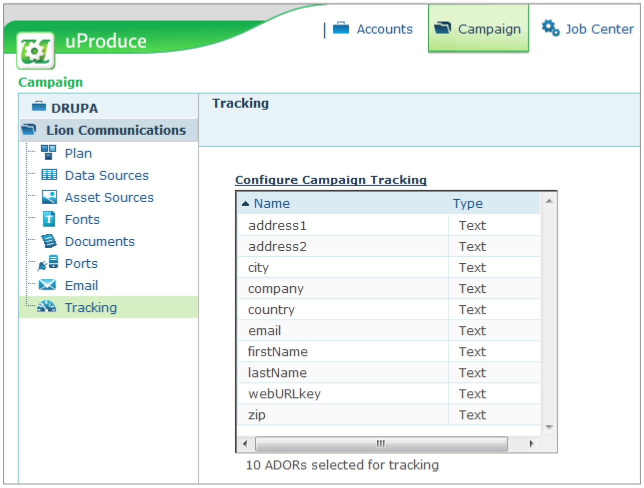
Click...	To...
Track	Save the value of this ADOR Object to the database.
Track all Text ADORs	Save the values of all ADOR Objects whose type is Text (other types of ADOR Object values become unavailable). This is useful when all the recipient information is in the form of text fields (name, gender etc.). When this option is checked, if the Campaign's Plan is changed and new Text ADOR Objects are added, they are automatically tracked as well.
Track these ADORs:	Go over the list and manually select the ADOR Objects whose values are to be tracked.
Select All	Select all ADOR Objects on the list.
Unselect All	Remove all ADOR Objects from the list.

The number of selected ADOR Objects is indicated below the list.

4. Click **Save**.

The **Tracking** page shows the Campaign's tracking configuration, listing the ADOR Objects whose values are to be tracked (Figure 4).

Figure 4: Campaign-Level—Tracking Configuration

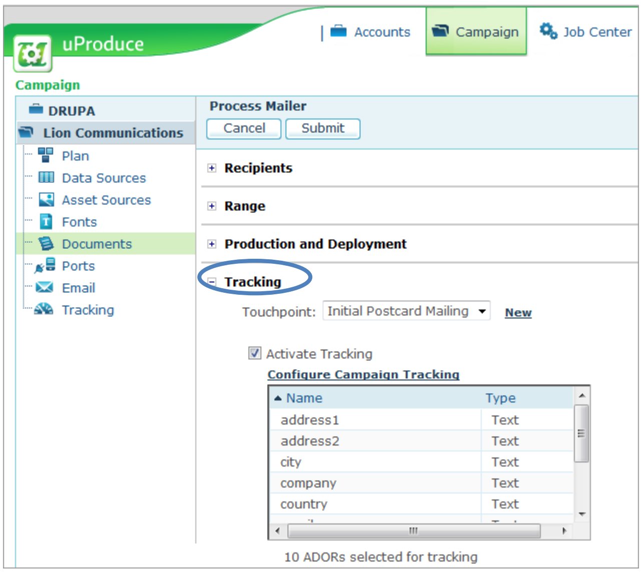


Configuring Touchpoints and Associating Them with Jobs

Touchpoints may be added and associated with jobs in two ways:

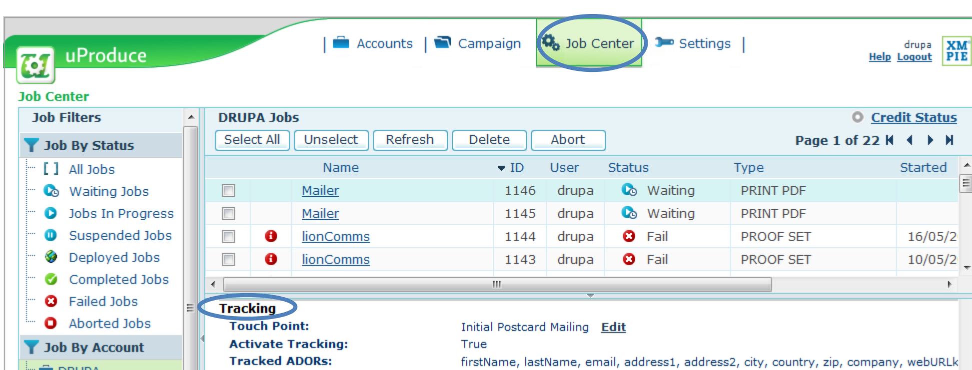
- Via the job definition—in the **Tracking** section of the **Process** or **Send Email Activity** pages[3] (Figure 5).

Figure 5: Job Definition (Process page)—Tracking section: Touchpoint



- Via the **Job Center**—in the **Tracking** section of the **Details** pane (Figure 6).

Figure 6: Job Center Details Pane —Tracking Section: Touchpoint



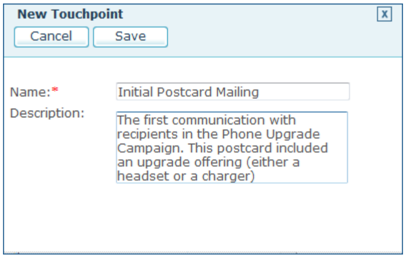
[3] Touchpoints cannot be associated with Port jobs.

To associate a job (Print or Email) with a Touchpoint:

1. Create a new Touchpoint by choosing one of the following:

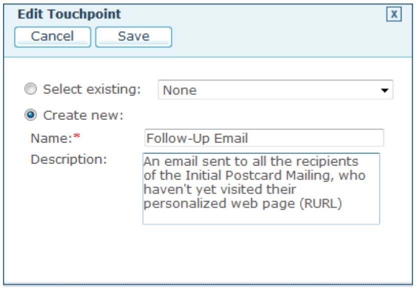
   - In the Job Definition's **Tracking** section, click **New**. The **New Touchpoint** window is displayed Figure 7:

     Figure 7: New Touchpoint window

   - In the Job Center's **Tracking** section, click **Edit**. The **Edit Touchpoint** window is displayed (Figure 8).

     Figure 8: Edit Touchpoint window

2. Configure the Touchpoint settings:

   - **Select existing** (**Edit Touchpoint** window only)—choose one of the existing Touchpoints from the list (default is **None**).
   - **Create New** (**Edit Touchpoint** window only)—add a new Touchpoint, by enabling the **Name** and **Description** fields.
   - **Name** (mandatory)—enter a name that identifies the new Touchpoint.
   - **Description** (optional)—enter free text that describes the new Touchpoint.

3. Click **Save**.

   The new Touchpoint and its association with this job are saved to Marketing Console database.

Using the Job Center to View Tracking Details and Associate Jobs with Touchpoints

The Job Center allows you to:

- View the tracking configuration (the **Tracked ADOR Values** list) of Print, Send Email Activity and Port jobs.
- Associate Print and Email jobs (whether tracking has or hasn't been activated for those jobs) with a new or existing Touchpoint.

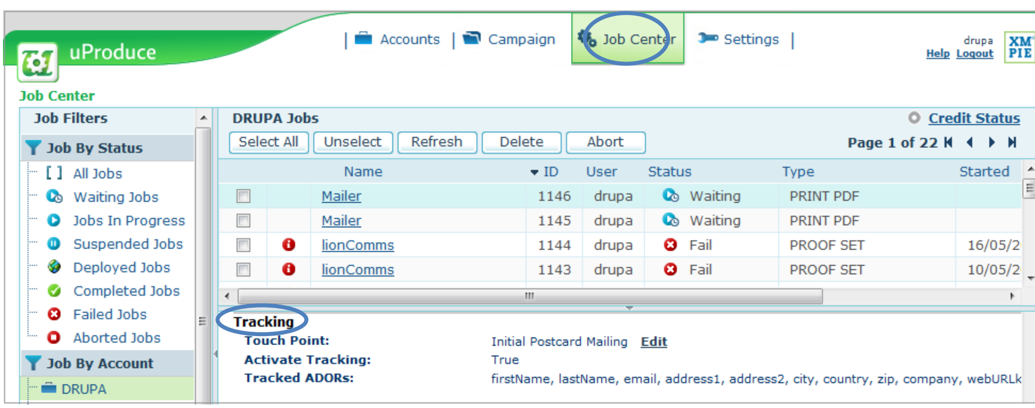
To access the job's tracking configuration from the Job Center:

1. In the **Job Center**, select the job in question from the list of jobs.

   The job's information is displayed in the **Details** pane (at the bottom).

2. In the **Details** pane, scroll down to the **Tracking** section (Figure 9).

   Figure 9: Job Center—Details Pane with Tracking



The job's tracking details include:

- **Touch Point** — the name of the Touchpoint this job is associated with (or **None**, if no Touchpoint is associated with this job). To associate this job with a different or new Touchpoint, click **Edit** and setup the **Edit Touchpoint** window as needed (see Figure 8 on page 18).
- **Activate Tracking** — indicates whether the **Activate Tracking** check box is set to **True** (checked) or to **False** (unchecked).
- **Tracked ADORs** — if the **Activate Tracking** check box is set to **True**, this field shows a concatenated list of the tracked ADOR Objects, separated with commas.

Configuring Tracking in uCreate XM

Tracking is configured in uCreate XM by defining web events to be tracked.

***Note:** To implement this configuration, tracking must be activated for the corresponding Port job defined in the uProduce Dashboard (see* *Activating Tracking via uProduce Job Definitions on page 25**).*

uCreate XM allows you to track different types of web events, i.e. the occurrence of actions relating to the Campaign's various web elements:

- *Web pages*—track the user's landing on the specified web pages.
- P*age elements*—track OnClick (focus) and OnBlur (lost focus) events concerning HTML elements and ASPX controls.
- *Links*—track the clicking of the specified links.
- *Custom* tracking—insert your own JavaScript code to track any required event.

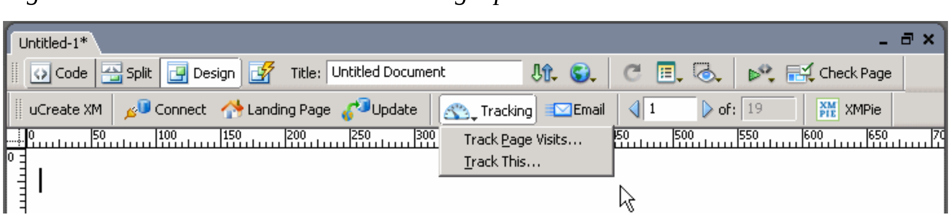
***Note:** Web browser attributes (such as type, version, language etc.) are recorded automatically.*

uCreate XM Toolbar—Tracking Menu

Web events are tracked as *Server Behaviors*, managed via the uCreate XM toolbar.

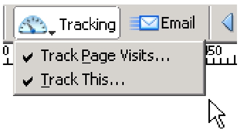
The toolbar's **Tracking** button (Tracking opens a menu that includes two items: Track Page Visits… and Track This… (Figure 10):

Figure 10: uCreate XM Toolbar—Tracking Options



When the page and/or the currently edited page element (a native HTML element or an ASPX control) are tracked, a matching item is added to the **Server Behaviors** palette, and a checkmark is shown near the corresponding menu item (Figure 11).

Figure 11: Tracking Menu with Checkmarks Indicating Tracking



Tracking Page Visits

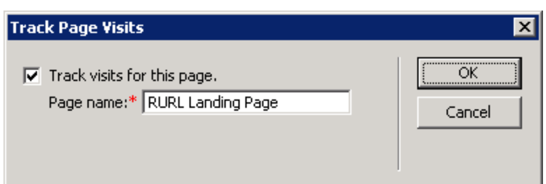
You can determine whether a web page is or isn't tracked.

To track visits to this web page:

1. From the **Tracking** toolbar, choose **Track Page Visits...**

   The **Track Page Visits** dialog is displayed (Figure 12).

   Figure 12: Track Page Visits dialog box

2. Configure tracking as follows and click **OK:**

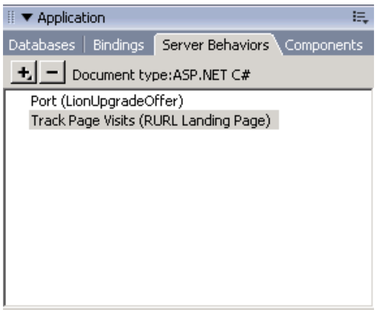
Click...	**To...**
Track visits for this page	Track visits to the named web page. When this option is unchecked, the **Page name** field is disabled. If this page had been tracked in the past and has a corresponding Server Behavior, this behavior is deleted.
Page name	Enter the name of the page whose visits are to be tracked. You may specify any value, using up to 255 characters.

Note: *The Page name parameter is shared between all uCreate XM tracking dialogs. Changing it in one dialog will affect all other dialogs.*

When the page is tracked, the following takes place:

- A checkmark is added to the **Track Page Visits...** menu command (see Figure 11 on page 21).
- A matching Server Behavior, labeled **Track Page Visit (<Page Name>)**, is listed in the **Server Behavior** palette (Figure 13).

Figure 13: Server Behaviors—Palette with a Tracked Page Visit



Tracking Web Page Elements

You can now track individual web page elements. An element may be a native HTML element (for example, <A> (link), <BODY>, <P>) or an ASPX control. Both are tracked using JavaScript-based Server Behaviors.

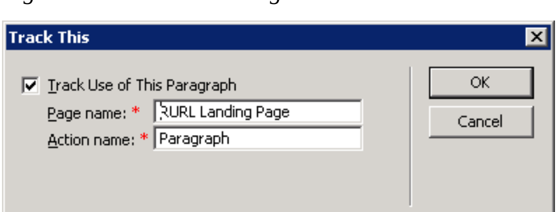
Note: *Tracking is applied to the currently selected web page element.*

To track a web page element:

1. From the **Tracking** toolbar, choose **Track This...**

   The **Track This** dialog is displayed (Figure 14).

   Figure 14: Track This dialog



Note: *The dialog title and labels change, depending on the type of element that is currently selected (for example, a paragraph, a button etc.).*

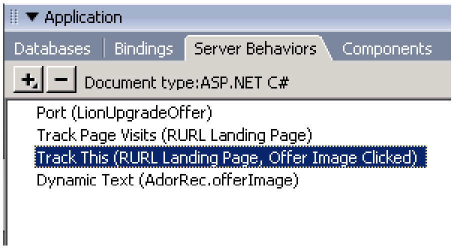
2. Configure tracking as follows, and click **OK:**

Click...	To...
Track Use of This <Element Type>	Adds tracking to the currently edited HTML element or ASPX control. The event that is tracked by default depends on the selected element: • *OnBlur* event (lost focus)—for dropdowns, radio button groups, checkboxes, text boxes, list boxes, and checkbox lists. • *OnClick* event (focus)—for all other element types. When this option is unchecked, the **Page name** and **Action name** fields are disabled.
Page name	Enter the name of the page containing the element to be tracked. You may specify any value, using up to 255 characters. ***Note:*** *The Page name parameter is shared between all uCreate XM tracking dialogs. Changing it in one dialog will affect all other dialogs.*
Action name	The logical action performed. This name is used by the marketing person in the Marketing Console, as a non-technical term that describes the action the user performed, disregarding the technical method used (link was clicked/button was clicked/text box was edited etc.) The default action name is **Paragraph**; you may override it with a meaningful name that describes this action, for example, “Offer Image Clicked”.

When the element is tracked:

- A checkmark is added to the **Track This...** menu command (see Figure 11 on page 21).
- A matching Server Behavior, labeled **Track This (<Page name>, <Action Name>)**, is listed in the **Server Behavior** palette (Figure 13).

Figure 15: Server Behaviors—Palette with a Tracked Page Element



Activating Tracking via uProduce Job Definitions

Tracking is activated in the uProduce Dashboard, as part of the job definition process. Each type of job has its own job definition page:

- Print jobs are defined in the **Process** page
- Email jobs are defined in the **Send Email Activity** page
- Port jobs are defined in the **Create Port for** Campaign page

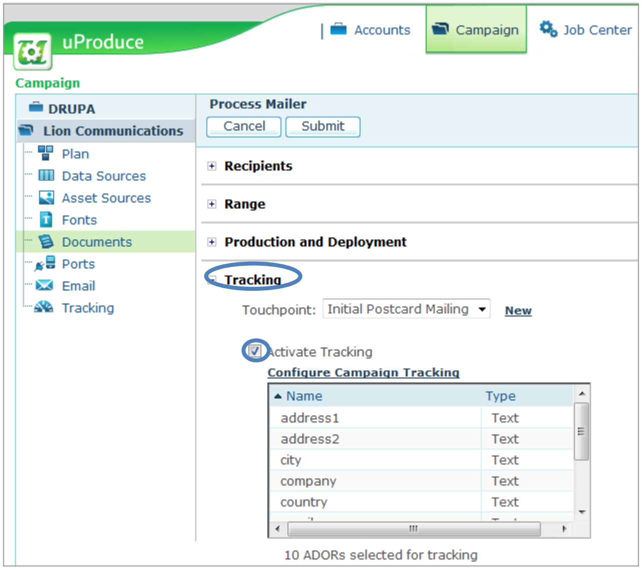
These job definitions share a common **Tracking** section, activated in the same way regardless of the job type. In the following procedure, tracking is activated for an example print job.

To activate tracking for a print job (Process page):

1. In the Campaign tree, select the **Documents** branch.
2. In the **Documents** page, select the desired Document.
3. In the selected Document's page, click **Process**.

   The **Process** page is displayed.
4. Scroll down to the **Tracking** section (Figure 16).

   Figure 16: Job Definition (Process page)—Tracking section: Activate Tracking



5. To enable tracking, select the **Activate Tracking** check box.

The uProduce Server is now set to record any events configured for tracking (whether you wish to track ADOR Objects values, web events or both).

Configuring Tracking via uProduce Job Definitions (Print, Email and Port)

Job definitions allow you to configure tracking by accessing the **Track ADOR Values** list. It is recommended to configure this list once, at Campaign level (see Configuring a List of Tracked ADOR Object Values on page 13), and then enable or disable this configuration per-job, without changing the list (to avoid Partial attributes, which not tracked for all Campaign jobs, and might lead to inaccurate analysis results).

However, when necessary, you can also configure the **Track ADOR Values** list at the job-level. For example, while setting a specific job definition, it may be convenient for you to define all tracking settings on the same page: activate tracking for that specific job, and configure the **Track ADOR Values** list for the entire Campaign. Alternatively, this list may already be configured, but you may need to update it to reflect changes in the Campaign's ADOR Objects.

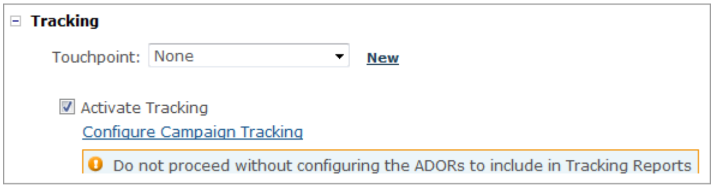
The following procedure explains how to configure for tracking using a Print job as an example, but the same tracking configuration applies to Email Activity jobs and Port jobs.

To configure the Track ADOR Values list via a print job definition (Process page):

1. In the Campaign tree, select the **Documents** branch.
2. In the **Documents** page, select the desired Document.
3. In the selected Document's page, click **Process**.

   The **Process** page is displayed.
4. Scroll down to the **Tracking** section and check **Activate Tracking**.
   - If tracking has already been configured, the table listing the ADOR Objects selected for tracking is displayed under the **Configure Campaign Tracking** link (Figure 16 on page 25).
   - If tracking has not been configured yet for this Campaign, a warning message is displayed asking you to configure tracking (Figure 17):

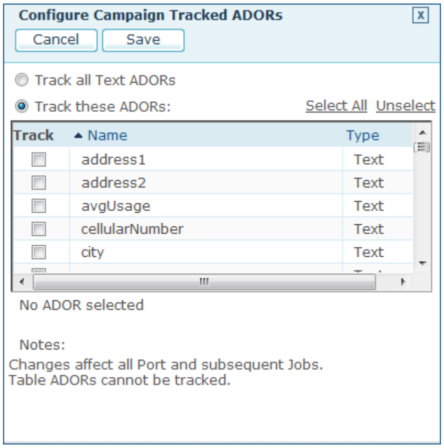
Figure 17: Configuring Tracking—via a Print Job Definition (Process page)



5. Click the **Configure Campaign** link.

   The **Configure Campaign Tracked ADORs** window is displayed, listing all the Campaign's ADOR Objects by their **Name** and their **Type** (Figure 18).

   Figure 18: Configure Campaign—Tracked ADORs window



***Note:** ADOR Objects whose permission in the Plan file is "write-only" are always tracked, so they appear checked and disabled.*

6. Go over the list, and check the **Track** check box of ADOR Objects whose values are to be saved to the database:

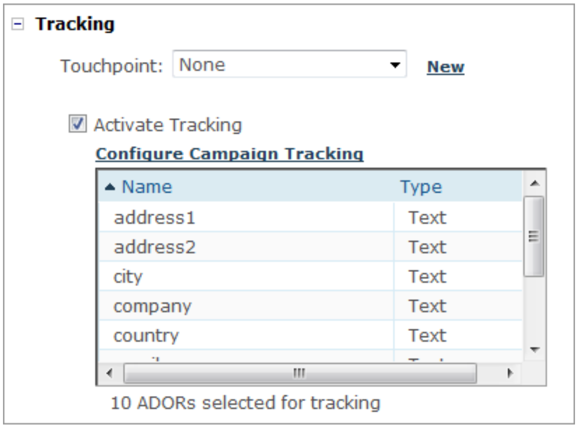
Click...	To...
Track	Save the value of this ADOR Object to the database.
Track all Text ADORs	Save the values of all ADOR Objects whose type is Text (other types of ADOR Object values become unavailable). This is useful when all the recipient information is in the form of text fields (name, gender etc.). When this option is checked, if the Campaign's Plan is changed and new Text ADOR Objects are added, they are automatically tracked as well.
Track these ADORs:	Go over the list and manually select the ADOR Objects whose values are to be tracked.
Select All	Select all ADOR Objects on the list.
Unselect All	Remove all ADOR Objects from the list.

The number of selected ADOR Objects is indicated below the list.

7. Click **Save**.

   The **Tracking** section shows the Campaign's new tracking configuration, listing the ADOR Objects whose values are to be tracked (Figure 19):

Figure 19: Process Page —Tracking Section



Chapter 3: Getting Started with Marketing Console

Marketing Console allows you to generate visually rich, up-to-the-minute reports on the fly. This chapter provides an overview of the application's basic features and usage:

User Roles

As explained in Chapter 1: Introduction, all uProduce users who have access to tracked Campaigns are automatically defined as Marketing Console users. Each user is assigned one of the following roles: Administrator, Operator or Analyst.

Administrator

This user is a system manager who works for the service provider (an internal user). The Administrator is a fixed user, *admin*, whose role cannot be changed, and is automatically assigned to the uProduce administrator. The administrator's responsibilities include controlling the Service Levels (Standard or Professional) of all Campaigns and the roles (Analyst or Operator) of all users in the entire system (for details, see Marketing Console Administrator's Guide).

***Note:** The Administrator focuses on system configuration, not on Campaign analysis. The reports and the Dashboard are intended for other users.*

Operator

This user is a marketing analytics professional, who creates reports, either for his own use or for the use of Analysts. The Operator has full permissions to view and edit existing reports, and to create new custom reports.

The Operator's access to Campaigns depends on the product's Edition:

- **Express Edition**—the Operator has access to *all* tracked Campaigns in the system (not just those this user is allowed to access via uProduce).

Note: *To protect your customers' privacy, the Express Edition Operator may only be a service provider employee (an internal user).*

- **Premier and Signature Editions**—the Operator's access to Campaigns is controlled by the Administrator, who can either allow the Operator to access all Campaigns, or set the same permissions as those defined in uProduce. This feature allows Premier and Signature Editions Operators to be either service provider employees (internal users) or customer employees (external users).

Analyst

This user is a marketing analytics professional, or a marketing executive (such as a CMO). The Analyst may work either for the service provider (an internal user), or for a customer (an external user). This is the default role given to all non-administrator uProduce users. The Analyst's reporting permissions depend on the product's Service Level:

- **Standard Service Level**—allows Analysts to view (i.e. run) existing reports, typically pre-created by Operators.
- **Professional Service Level**— allows Analysts to view (i.e. run) existing reports, typically pre-created by Operators; and modify and create their own reports, both for personal use and for the use of others.

For more information on the differences between Operators and Analysts, see Table 1 on page 8.

Logging-in to Marketing Console

Marketing Console is a web-based application, accessed over the Internet or your company's intranet.

To log in:

1. Open your Web browser and go to the URL supplied by your system administrator (for example, http://<ServerName>/MarketingConsole, where <ServerName> is the name of the server on which the Marketing Console website is installed).

   The **XMPie uProduce Marketing Console Login** page is displayed (Figure 20).

Figure 20: XMPie uProduce Marketing Console—Login page

2. Enter your user name and password (new users should obtain this information from their system administrator).

> ***Note:*** *These are the same user name and password used to login to uProduce.*

Your user name is saved and will appear automatically the next time you log in, if cookies are enabled.

3. Click the **Login** button.

Marketing Console is displayed, and you can start analyzing your Campaign performance.

Marketing Console Environment

Marketing Console includes two main tabs, Reports and Dashboard. The basic interface described here is common to all users, but the specific options available may change, depending on the following:

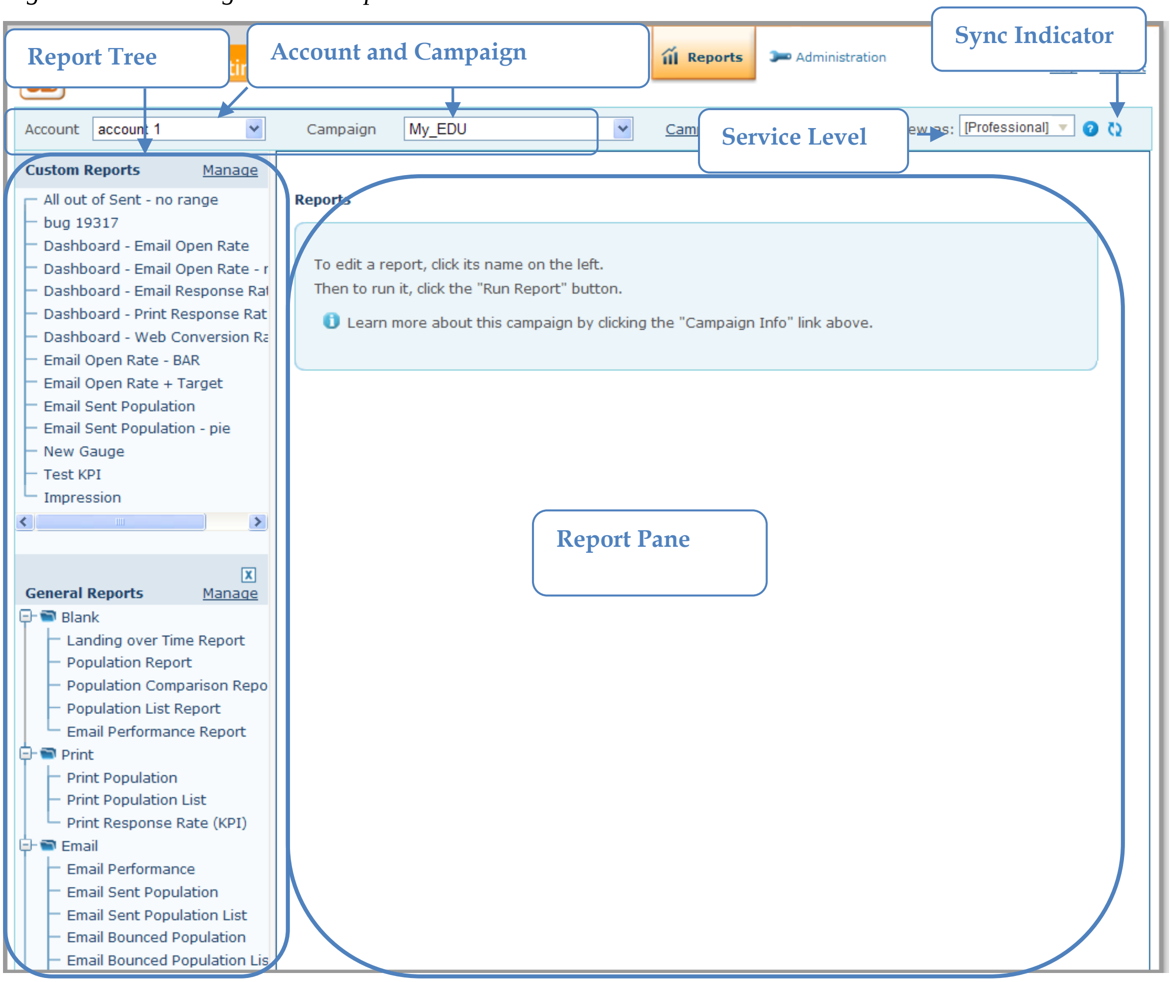
- Your PE Analytics license: Express, Signature or Premier Edition
- The Campaign's Service Level: Standard or Professional
- Your user role: Operator or Analyst[4].

Reports tab

The application is launched with the **Reports** tab displayed. This tab is used to analyze the tracked data, by running **Custom** or **General** Reports. Figure 21 shows the **Reports** tab as it appears to Analysts using Standard Service Level (other users may access additional options).

[4] Administrators work with a different interface: the "Administration" tab.

Figure 21: Marketing Console Reports tab—Standard Service Level



This basic interface is common to all users, but the specific options available may change, depending on the following:

- Your PE Analytics license: Express, Signature or Premier Edition
- The Campaign's Service Level: Standard or Professional
- Your user role: Operator or Analyst[5].

The **Reports** tab consists of the following sections:

- **Account** and **Campaign**—select the marketing Account, and a Campaign within that Account, whose tracked data are to be analyzed. If the administrator has defined information for this Campaign, a **Campaign Info** link is displayed next to the Campaign name, allowing you to go to a web page describing the selected Campaign.

Note: *The Accounts and Campaigns that appear on these lists, and the user's permission to access them, are all defined on the uProduce Server. For each user, the application shows only the Accounts and Campaigns he or she has permission to access. Accounts and Campaigns that do not contain tracking information are not listed.*

- **Operator Service Level Selector**—if the Administrator (admin) gave the Operator who is currently logged in permission to change the Service Level, the **View as** drop-down list is displayed in the upper right corner. This list allows the Operator to switch between the Standard Service Level and the Professional Service Level. The Campaign's Service Level, which is seen by Analysts, is indicated by square brackets ([ ]).

- **Synchronization indicator** ()— is displayed when the Marketing Console Analytical database is being synchronized with the Tracking database. During this time, new tracked events are being transferred to the Marketing Console Analytical database and are not available for the reports. Therefore, the reports that are generated while the synchronization indicator is turned on will not count the new events that have not yet been synchronized. The synchronization status is viewed in the scope of all Campaigns for the Administrator and for a single campaign for Operator or Analyst. You may continue working without interruption, however, it is recommended to run reports again once the synchronization is completed and the synchronization indicator has disappeared. The synchronization process will be triggered automatically in several cases, for example, immediately after many print or email events occurred in uProduce.

- **Reports Tree**—holds two types of reports:

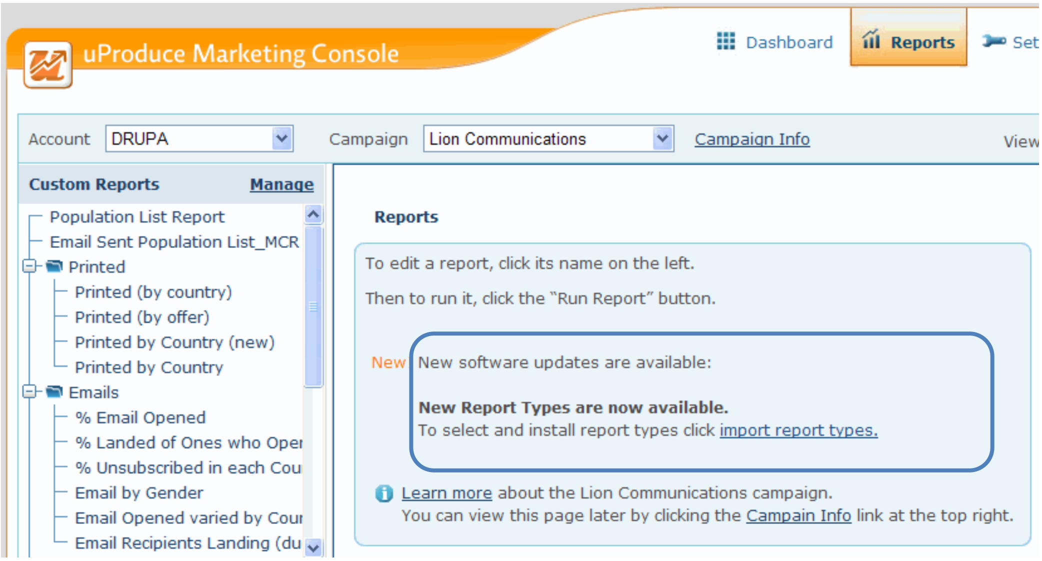
[6] Users who have permission to create reports have access to an addition category: "Blank" reports (under General Reports on page 65).

- **Custom Reports**—reports that are tailored to the needs of a specific customer, and are usually created by an Operator (see Custom Reports on page 55).
- **General Reports—**predefined reports that are included with Marketing Console and address common issues (see General Reports on page 52). The reports are organized into categories: **Blank** or media-specific (**Print**, **Email** or **Web**). By default, the commonly-used **Print Population** report is selected.

You can hide or show the listed reports, by clicking the **Hide Reports** () button or the **More Reports** link (respectively).

- **Reports pane**—shows the relevant report options, based on the product license, the Campaign Service Level and your Role; and displays the result of the report you select from the Report tree (see Running a Report on page 38). In addition, during the login to the Marketing Console, the system checks if there are updates in the XMPie Update Center. If there are new software updates, after login, the Report pane will display the **New** section notifying you of the latest version release and/or allowing you to import new report types. Please note that new reports are published once they become available and independently of the new version release. Users with administrator rights will be able to easily access and install new Marketing Console General Reports. For more information on importing reports, see Importing Reports on page 104).

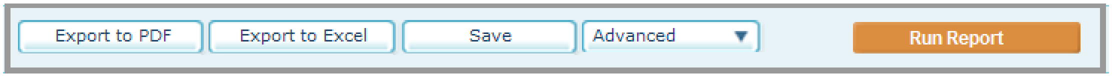
Figure 22: Reports tab—Actions Toolbar



Campaign Info (optional) — if the admin has defined information for this Campaign, this link is displayed, allowing you to go to a web page describing the selected Campaign.

- **Actions Toolbar**—shown once a report has been generated (Figure 23).

Figure 23: Reports tab—Actions Toolbar



The toolbar allows you to take the following actions:

- ◦ Export the report results to PDF or to Excel (see Updating a Report on page 41)
- ◦ Customize a generic report to pinpoint your specific needs, and saving its definition as a custom report in the **Custom Reports** category of the Reports tree (see Chapter 4: Managing Basic Reports).
- ◦ Place report results on the **Dashboard** tab, where the latest data are constantly visible (see Adding a Report to the Dashboard on page 47)
- ◦ Mark recipients for the next Campaign phases and update their database records (see Marking Recipients for Next Campaign Phases and Mass Update on page 74)

Dashboard Tab

The **Dashboard** tab allows you to monitor real time report results, presented in the format of your choice. You can add reports of interest to this tab to obtain the status of the Campaign at a glimpse.

Figure 24 shows an example **Dashboard** tab, featuring a variety of enhanced charts available with the Professional Service Level.

Figure 24: Marketing Console—Dashboard tab

For a detailed description of this tab, see Dashboard on page 44.

Reports Overview and Usage

The **Reports** tab (Figure 21 on page 33) allows you to define how to analyze your tracked data. Each report definition consists of all the properties that determine the report output, except for the actual data: this data is “live” and is constantly updated in the database. Each time you run a report, it is applied in real time to the latest tracked data, generating up-to-the-minute results.

Choosing a Report

The Reports tree lists the names of all reports available for generation. You can choose between General Reports and Custom Reports.

General Reports are commonly-used, out-of-the-box reports included with the application. The reports are divided into media-specific categories: **Print**, **Email** or **Web**[6] **(see** General Reports on page 52).

Custom Reports are created to address the needs of a specific customer in a specific Campaign. These reports are usually created by the service provider’s Operators, and are intended for the customer’s Analysts (see Chapter 4: Managing Basic Reports on page 50).

The Professional Service Level enables service providers to give their customers permission to create their own custom reports.

Running a Report

To run a report, simply select it from the **Reports** tree and click the **Run Report** button. The report is generated within seconds, showing the latest data tracked to your database.

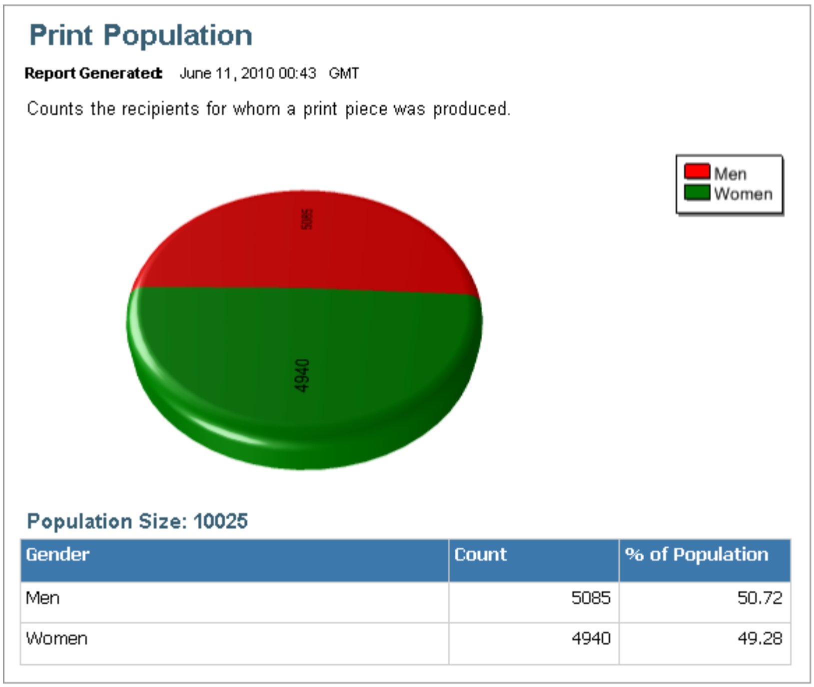
Figure 25: Basic Usage—Run Report

Note: *If, when running a report, you see the Synchronization icon ( ) rotating in the top right corner of the page, this means that the Marketing Console Analytical database is being synchronized with the Tracking database and therefore, your report results may not be up-to-date. In such cases, it is recommended to run the report again once all the events have been synchronized and the Synchronization icon disappears.*

[6] Users who have permission to create reports have access to an addition category: “Blank” reports (under General Reports on page 65).

Figure 26 shows an example custom report, **Population Report, by Gender**. This report tests whether men and woman respond differently to a certain promotional postcard, which asks them to go to a personalized Response URL (RURL) page. The analysis is performed by counting all recipients who went to their RURL page, and grouping the results by *gender*.

Figure 26: Running a Report—Custom Report: Population Report, by Gender



Gender	Count	% of Population
Men	5085	50.72
Women	4940	49.28

Once you click the report *name* in the tree, it is highlighted in blue. The report results (a chart and a table) are shown in the Report pane. The report *title* (**Population Report, Grouped by Gender**) is displayed above the chart, indicating the following:

1. The Report Type:
   - **Population Report**—used to **count** segments of the report population.
   - **Population List Report** —used to **list** the IDs of all of the entire report population.

- **Population Comparison Report** —used to **compare** two populations.
- **Landing Over Time Report** - used to **count** non-unique web page visits over a period of time. Each session of a recipient is counted once, even if the user visits a few pages, or even refreshes the page. If a customer comes back later, he will be counted as another non-unique visit (it creates a new web session).
- **Email Performance Report** –displays all statuses of an Email Touchpoint as well as its relevant key performance rates.

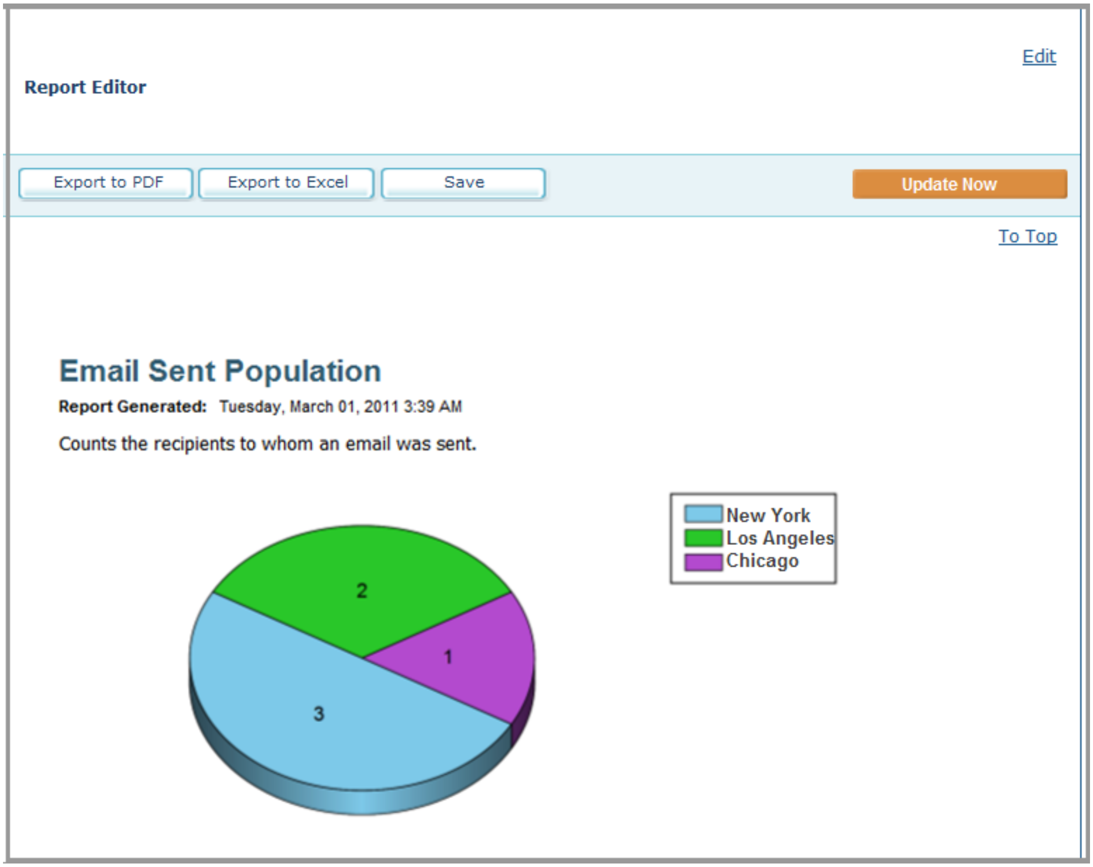
2. The Attribute by which the results are grouped (for example, Gender, City, etc.)

In this case, the report results show that out of 10,025 people who responded to the postcard and visited their RURL page, 50.72% were male and 49.28% were female. You can now safely conclude that the postcard was equally effective for both men and women, and that no gender-specific modifications are required.

Updating a Report

If you wish to update an existing custom report, select the report in the Custom Reports tree and click the **Update Now** button in the Report Editor.

Figure 27: Updating a Report



The report will display the most up-to-date results.

Exporting Report Results

Marketing Console allows you to export report results.

For all reports, except Email Performance and KPI, you may either **Export to PDF** or **Export to Excel**, by choosing the desired action from the Actions toolbar (Figure 28).

Figure 28: Reports tab—Actions Toolbar: Exporting to PDF or to Excel

The Email Performance and KPI reports may be exported to PNG format only.

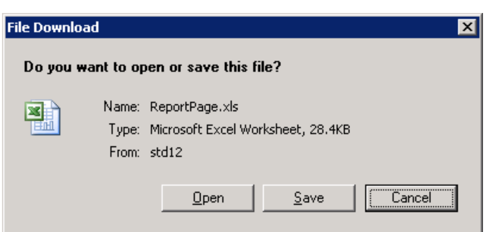
Figure 29: Reports tab—Actions Toolbar: Exporting to PDF or to Excel

To export report results to Microsoft Excel:

1. Click **Export to Excel**.

   The **File Download** window is displayed (Figure 30):

   Figure 30: Export to Excel—File Download window

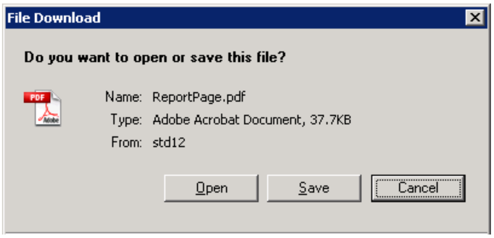
2. Choose whether to **Open** or **Save** the file (the file's default name is **ReportPage.xls**). The complete report results (including the report name, chart and table) are exported into an Excel sheet.

To export report results to Adobe PDF:

1. Click **Export to PDF**.

   The **File Download** window is displayed (Figure 31).

Figure 31: Export to PDF—File Download window



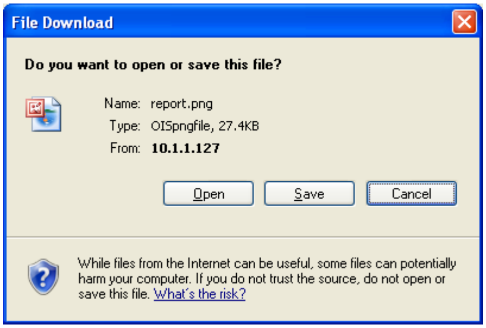
2. Choose whether to **Open** or **Save** the file (the file's default name is **ReportPage.pdf**).
   The complete report results (including the report name, chart and table) are exported into a PDF file.

To export report results to PNG:

1. Click **Export to PNG**.

   The **File Download** window is displayed (Figure 32).

   Figure 32: Export to PNG—File Download window



2. Choose whether to **Open** or **Save** the file (the file's default name is **report.png**).
   The complete report results (including the report name, chart and table) are exported into a PNG file.

Dashboard Overview and Usage

The **Dashboard** tab provides real-time visibility into multiple report results, serving as a summary view of the Campaign status. Any generic or custom report may be added to the Dashboard, **using events recorded from all types of media: print, email, web, or external as well as recipient attributes coming from the customer's database.**

The results are typically presented as charts, in the format of your choice: pie, chart, bar etc. Figure 33 shows an example Dashboard, featuring reports recorded from the Print Piece Sent, the number of Website Visitors, number of Call Center Orders etc. The enhanced charts are available to Professional Service Level users.

Figure 33: Marketing Console—Dashboard tab

The **Dashboard** tab consists of the following sections:

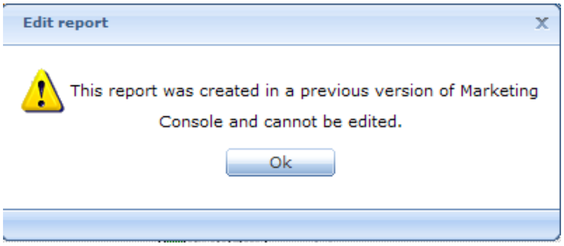
- **Account** and **Campaign**—select the marketing Account, and a Campaign within that Account, whose status (i.e. report results) is to be displayed.

Note:

- *The Accounts and Campaigns that appear on these lists, and the user's permission to access them, are all defined on the uProduce Server. For each user, the application shows only the Accounts and Campaigns he or she has permission to access.*
- *Accounts and Campaigns that do not contain tracking information are not listed.*
- *All users who have permission to access the selected Campaign share the same Dashboard.*
- *The Dashboard view is per-Campaign: you can only view the status of one Campaign at a time. To view the status of another Campaign, simply open another Dashboard window*

- **Synchronization indicator** ( ) - is displayed when the Marketing Console Analytical database is being synchronized with the Tracking database. To receive the up-to-date report results, run the reports again once synchronization completes and the synchronization indicator disappears.
- **Report Charts**—show your current report results, displayed in a chart format (if you also wish to view the results in a table format, go to the **Reports** tab and generate the report). You may add as many report charts as you wish to the Dashboard (see Adding a Report to the Dashboard on page 47).
- **Valid Through -** appears at the top left corner of the page and shows report recalculation date and time. Clicking the **Update** button will recalculate all the Dashboard reports and display the updated date and time.
- **Report Icons** –the following icons appear at the top right corner of each report chart.
  - **Magnify** - clicking this icon opens the magnified report in a new window.
  - **Edit** - clicking this icon opens the **Report Editor** page where you can edit the report (see Editing Report Definitions on page 51). Please note that reports that have been created in the previous versions of Marketing Console ("Legacy Reports") cannot be edited. A special warning message will be issued in this case.

Figure 34: Marketing Console—Legacy Reports



- **Close** – clicking this icon removes the Custom Report from the Dashboard. To return the Custom Report back to the Dashboard, select it in the **Reports** tab and click **Save** In the **Save Report** window select **Show in Dashboard** and **Replace existing report** (for more details, see Adding a Report to the Dashboard below).

Note: *You must wait while all reports are loaded to the Dashboard prior to clicking Magnify, Edit or Close.*

Adding a Report to the Dashboard

To obtain an up-to-date summary of your Campaign status whenever you need it, you can add the relevant report chart to the **Dashboard** tab. A newly added report is inserted into the next available space.

Note: *Each Campaign gets its own Dashboard, which is shared by all users that have access to that Campaign. Any modification to the dashboard (adding, moving or deleting reports) affects all users who have access to the Campaign.*

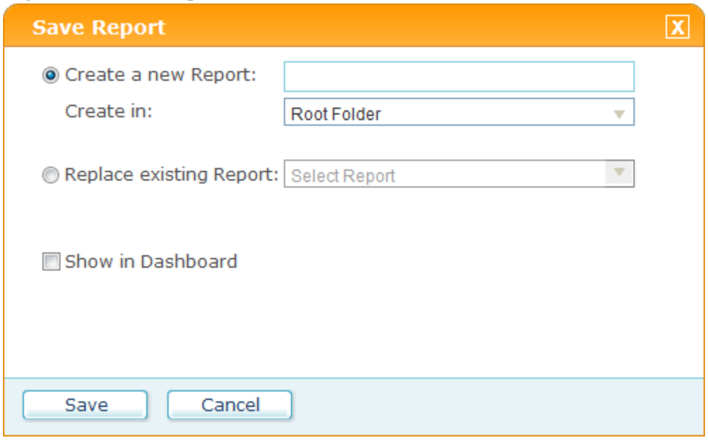
To add a report chart to the Dashboard:

1. At the bottom of the report definition, click **Save**.

   The **Save Report** window is displayed (Figure 81).

2. Select the **Create a new Report** radio button if you wish to add a new Custom Report. In the text box next to it, enter an informative the Report Name (see page 52). This name will be displayed in the Dashboard.

   Figure 35: Save Reports window



3. In the **Create** drop-down list, select a Report Folder in the Custom Reports tree where you wish to save your report. By default, a Root Folder is selected.

4. If you wish to override an existing report, select the **Replace existing report** radio button (instead of **Create a new Report** radio button). In the drop-down list, select an existing report you wish to replace.

5. If the report results are of interest to you, and you wish to keep them handy, you can add the report chart to the Dashboard tab by checking the **Show in Dashboard** checkbox. Please

note that the report that has been added to Dashboard will be generated only when you go to the **Dashboard** tab or during the daily Recalculation Time.

6. Click **Save**.

   The new Custom Report will be displayed in the **Dashboard**.
   By selecting it from the tree, the report reloads itself.
   When it is selected, a **Delete** link is displayed next to the custom report. Clicking it deletes the custom report.

Managing the Dashboard

The following table summarizes useful operations for managing the Dashboard.

To...	Proceed as follows:
Add a Report to the Dashboard	Go to the **Reports** tab, select the desired report from the Reports Tree and click **Save.** In the **Save Report** window, check **Show in Dashboard** checkbox. (see Adding a Report to the Dashboard on page 47).
Update the Results	The **Valid Through** field at the top left corner of the page displays the date and time of the last report recalculation (run daily at a pre-defined time set in the **Administration** tab >**Application Settings** >**Recalculate Reports daily at** field) and the time of the most recent change. To update the reports, click the **Update** button. The reports will be recalculated and the new date and time will be displayed in the **Valid Through** field. Whenever you land on the **Dashboard** tab, all reports are reloaded While on the page, you can reload all reports with up-to-date data by clicking the browser's Refresh (or Reload) button. Internet Explorer users may refresh the display by clicking the F5 key. In addition, the actions performed on this page (moving or deleting a report) cause all reports to be reloaded. Please note that reloading of reports does not trigger report recalculation and the **Valid Through** field is not modified.
Move a Report Component	By default, new report components (for example, charts) are added to the next available space. Internet Explorer users may also drag & drop reports to the desired location (this action updates all reports).

To...	Proceed as follows:
Delete a Report Component	Click the **Close** icon at the top right corner or the relevant report component (for example, chart). **Note:** *The report component is deleted only from the* **Dashboard**. *This operation has no effect on the corresponding report definition in the* **Reports** *Tab (you can continue to generate it as usual, and view its results chart)*.

Chapter 4: Managing Basic Reports

This chapter describes the editing options for two basic Report Types (page 55):

- Landing Over Time Report (page 60)
- Population Report (page 60)
- Population List Report (page 67).

The editing options for more advanced Report Types are described in Chapter 5: Managing Advanced Reports:

- Population Comparison Report (page 109)
- KPI Report (page 121)
- Unique Page Visit Report (page 124)
- Email Performance Report (page 126)

All users, except for Analysts working on Standard Service Level Campaigns, have editing permissions and can create reports. To create a new report, simply *edit* one of the existing report definitions before running it, so that it better suits your current needs.

If you plan to go back to the same report, or to continue tweaking the report definition (instead of starting over with a **General** report), you can *save* the modified report by adding it to the **Custom Reports** section of the Reports tree. The custom report is added only to the current Campaign, and is available to all users who have access to this Campaign.

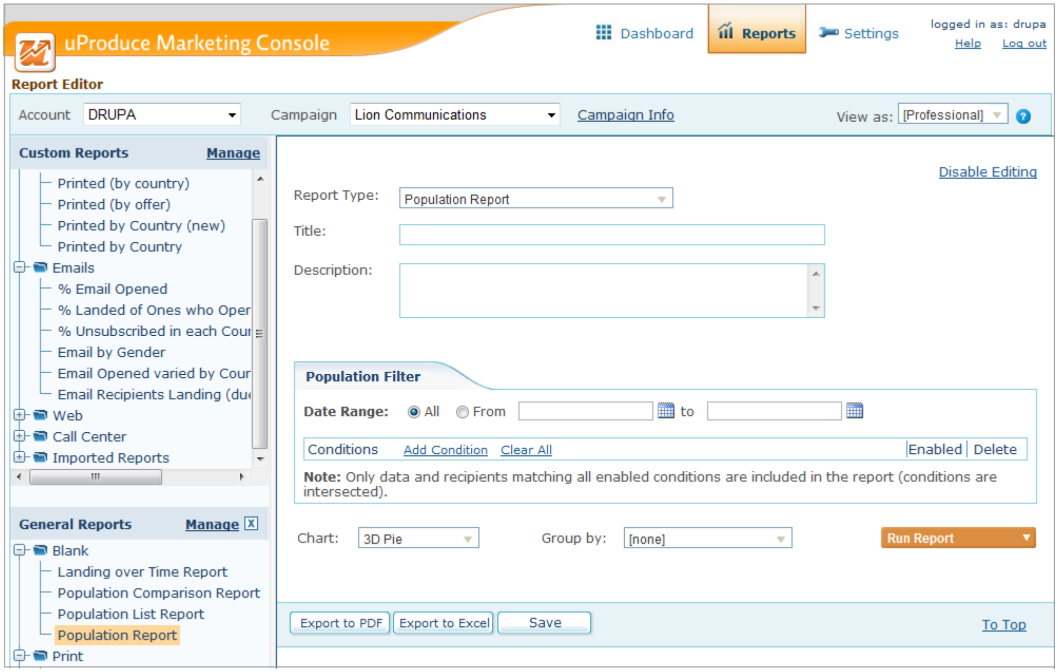
Editing Report Definitions

To edit a report, take the following steps:

1. In the **Reports** pane, click the **Enable Editing** link (see Figure 21 on page 33).
2. In the Reports tree, click the report you wish to edit, for example: **Population Report**.

   The **Report Editor** page is displayed in the right pane and the link changes to **Disable Editing** (see Figure 36). The Report Type is displayed in the **Report Type** drop-down list.

   Figure 36: Editing the Population Report



3. Modify the report definitions (see Report Definitions below) as needed.

Report Definitions

A Report Definition consists of the following components:

- Report Name (page 52)
- Title (page 56)

- Description (page 56)
- Attribute Display Names (page 57)
- Population Filter (page 58)
- Chart Type (page 58)
- Grouping of the report results by Recipient-Attribute (page 59)

Report Name

The Reports tree lists the names of all reports available for generation. You can choose between General Reports and Custom Reports.

General Reports

General Reports are commonly-used, out-of-the-box reports included with the application. The reports are divided into categories: **Blank** or media-specific (**Print**, **Email** or **Web**).

The **Blank** category offers reports that have a blank Population Filter, with no conditions. These reports are intended for users with editing permission, who wish to define their own filters.

Note: *Blank reports are unavailable to Analysts using the Standard Service Level.*

Most report results are provided in the form of a chart, followed by a table. Some reports have a “List” version, which lists the IDs of all recipients included in the report. The available reports are described in Table 2.

Table 2: General Report Descriptions

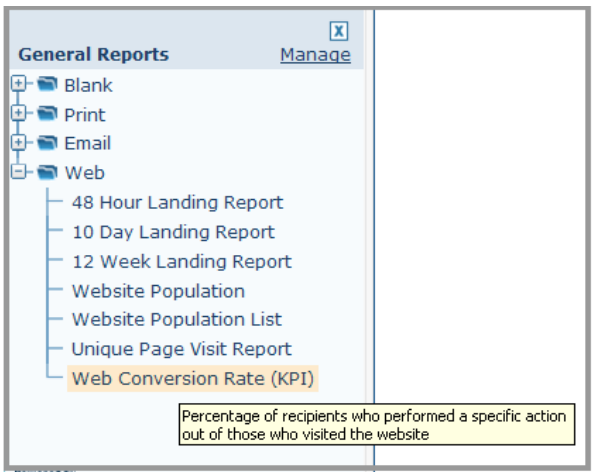
Category	Name	Description
Blank	Landing Over Time Report	A report that counts non-unique website visits over a period of time. Multiple visits during the same session are counted as a single visit for the purpose of the report.
	Population	A report with a blank filter, to be set by the user, in order to count the population that matched the filtering conditions within the analysis timeframe. The results are grouped by a specific Recipient-Attribute, such as gender or age. For example, you can count the population that accessed a certain web page and group the results by gender.

Category	Name	Description
	Population Comparison	A report with a blank filter, to be set by the user, in order to compare two Populations within the analysis timeframe. The two populations have different filtering conditions (for example, the population that entered the website, compared to the population that both entered the website and purchased the product), but are grouped by the same Recipient-Attribute (for example, their loyalty-group. See Population Comparison Report on page 109.
	Population List	A drill-down listing of all individual members or contacts participating in a given Campaign and matching the population filter. The recipient ID and attributes are listed in the report. You can further drill down the Population List report to view the historical events of each Recipient by clicking the Recipient ID link.
	Email Performance	Displays all statuses of an Email Touchpoint as well as its relevant key performance rates. Note that you will have to select a Touchpoint.
Print	Print Population	Counts the recipients for whom a print piece has been produced.
	Print Population List	Lists the recipients for whom a print piece has been produced.
	Print Response Rate (KPI)	Counts the percentage of recipients who visited any website out of those who received any print piece.
Email	Email Sent Population	Counts the recipients to whom an email has been sent.
	Email Sent Population List	Lists the recipients to whom an email has been sent.
	Email Failure Population	Counts the recipients whose email failed to be delivered.
	Email Failure Population List	Lists the recipients whose email failed to be delivered.
	Email Opened Population	Counts the recipients who opened an email.
	Email Opened Population List	Lists the recipients who opened an email.
	Email Unsubscribed Population	Counts the recipients who unsubscribed from email notifications.

Category	Name	Description
	Email Unsubscribed Population List	Lists the recipients who unsubscribed from email notifications.
	Email Sent but Not Opened Population	Counts the recipients to whom an email has been sent but who did not open it.
	Email Sent but Not Opened Population List	Lists the recipient to whom an email has been sent but who did not open it.
	Email Opened but Not Landed Population	Counts the recipients who opened the email but did not land to a website.
	Email Opened but Not Landed Population List	Lists the recipients who opened the email but did not land to a website.
	Email Performance	Displays all statuses of an Email Touchpoint as well as its relevant key performance rates.
	Email Open Rate (KPI)	Counts the percentage of recipients who opened any email out of those who received any email. Note that you will have to select the specific email's Touchpoint in all conditions.
	Email Response Rate (KPI)	Counts the percentage of recipients who visited any website out of those who opened any email.
Web	48 Hour Landing Report	Counts non-unique website visits during the last 48 hours.
	10 Day Landing Report	Counts non-unique website visits during the last 10 days.
	12 Week Landing Report	Counts non-unique website visits during the last 12 weeks.
	Website Population	Counts the unique recipients who have visited the website.
	Website Population List	Lists the unique recipients who have visited the website.
	Unique Page Visit	Shows the popularity of the web pages among the population that matched the filtering conditions, within the analysis timeframe (see Unique Page Visit Report on page 124).
	Web Conversion Rate	Counts the percentage of recipients who performed any action out of those who visited any website. Note that you will have to specify the website in the condition; otherwise you will get aggregated results.

For a brief description of each report, hover with your cursor over the report name (Figure 37):

Figure 37: Report Description Tool Tip



Custom Reports

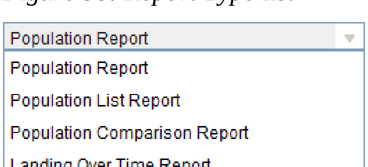
Custom Reports are created to address the needs of a specific customer. These reports are usually created by the service provider's Operators, and are intended for the customer's Analysts.

The Professional Service Level enables service providers to give their customers editing permissions, allowing them to create their own custom reports.

Report Type

Once you select a Report Name from the Reports tree, its type is displayed in the Reports pane (Figure 38).

Figure 38: Report Type list



The **Report Type** is a drop-down list, allowing you to change the current report type to one of the following:

- **Population Report**—used to **count** segments of the report population.

- **Population List Report** —used to **list** the recipients of the report population.
- **Population Comparison Report** —used to **compare** two populations.
- **Landing Over Time Report** – used to **count** non-unique web page visits over a period of time.

Note: *Email Performance Report is based on a different report type that is not listed in the* ***Report Type*** *drop-down list.*

Title

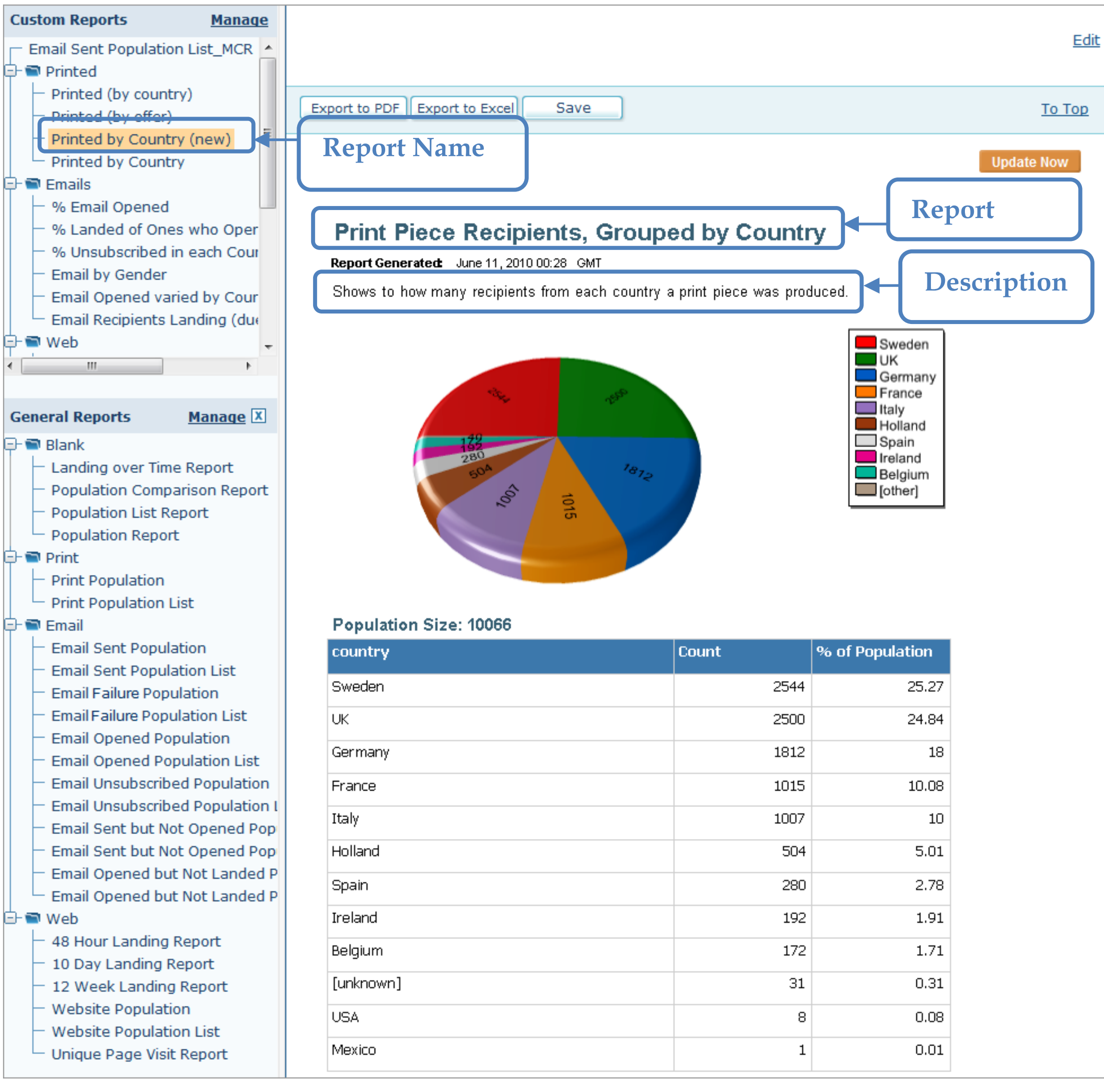
The **Title** field contains the customized report title as it will appear in the report body. The **Title** should be distinguished from the **Report Name** (page 52).

For example, **Print Population List** is a Report Name that can be given a customized Title, such as "A List of Recipients for whom a Print Piece was Produced". The Report Name, which is usually a brief description, appears in the Reports tree, whereas the Report Title, that can be quite long, appears in the Report body (Figure 39).

Description

The **Description** field briefly states the Report's purpose and content. This is a free-text field used to provide more detailed information in addition to Report Name and Title (Figure 39).

Figure 39: Report Name, Report Title and Description



Attribute Display Names and Attribute Value Display Names

Attribute and Attribute Value Display Names are used to define user-friendly customized Display Names for all Attributes and their Values. Custom Display Names are displayed throughout the customer application instead of the original names. For more information, see Attribute Display Settings on page 149.

Population Filter

The Population Filter is a population selector. It can be viewed and edited by Analysts using the Professional Service Level, and by Operators using any Service Level.

This filter consists of the following:

- **Date Range**—limits the Analysis Timeframe. This condition selects only the population for which events have occurred within the specified date range.
- **Condition(s)**—each condition is a criterion for filtering or selecting a population. There are four types of conditions:
  - Recipient Condition
  - Event Condition
  - Event-Sequence Condition
  - Other Condition

  Each class of condition may have one or more options. For details, see Population Filter on page 74.

Chart Type

The report results are displayed in one of the following chart formats (in addition to the table format):

- Pie
- Pie - 3D
- Doughnut
- Bar
- Bar - 3D
- Gauge – half circle

  This chart type must be used if you wish to run one of the KPI reports (see KPI Reports on page 121).
- None—the report result s are shown only in a table format

***Note:** When you add a report to the Dashboard, you are actually adding the results chart.*

Grouping

Report results are grouped by a specific Recipient-Attribute. This Recipient-Attribute may be either an ADOR Object (such as gender, city, loyalty program etc.); a web-attribute, such as a browser type; an operating system; or a user-defined attribute (used to record any event generated by an external system).

Basic Usage Example

This section describes an example marketing Campaign, and explains how to analyze it using a custom report, created by editing the Population Report.

Note: *The example Campaign described below is used throughout this chapter and the chapter that follows. Once you start tracking your real Campaign data, you will be able to apply the same principles to analyze your own Campaign results.*

Example Campaign: Lion Communications Phone Upgrade Campaign

Lion Communications, a fictitious cellular provider, is launching a Phone Upgrade Campaign. The company is offering an upgrade incentive, and needs to compare the effectiveness of two optional incentives: a *Headset* or a *Charger*.

The company wants to run an A to B test pilot Campaign, before rolling out the promotion on a larger scale. An initial, personalized postcard is sent to 10,000 recipients (Figure 40):

Figure 40: Personalized Postcard with Gift Incentive (Charger) and RURL

The postcard includes a personal greeting (for example, **Dear John**); the URL of a personal web page, known as a Response URL (RURL), a phone upgrade offer (based on the recipient's usage) and a gift incentive. The marketer is not sure which gift, headset or charger, is a better upgrade incentive. To answer this question, the pilot Campaign tests two populations: population A (in this case, 50% of all recipients) is offered a Headset, while population B (the remaining 50%) is offered a Charger.

The call for action on this postcard is to follow the specified RURL, which leads to a personalized *Landing Page*. Our goal is to find out which offering is a better incentive to visit the RURL web page: the Headset or the Charger? We can then refine our Campaign to use the most effective offering, trusting that it will lead to improved ROI.

Landing Over Time Report

First, we would like to see that people are landing at our website. For this purpose, we will run the Landing Over Time Report that counts the website visits.

There are three types of Landing Over Time Report:

- **48 Hour Landing Report**: counts website visits during the last 48 hours.
- **10 Day Landing Report**: counts website visits during the last 10 days.
- **12 Week Landing Report**: counts website visits during the last 12 weeks.

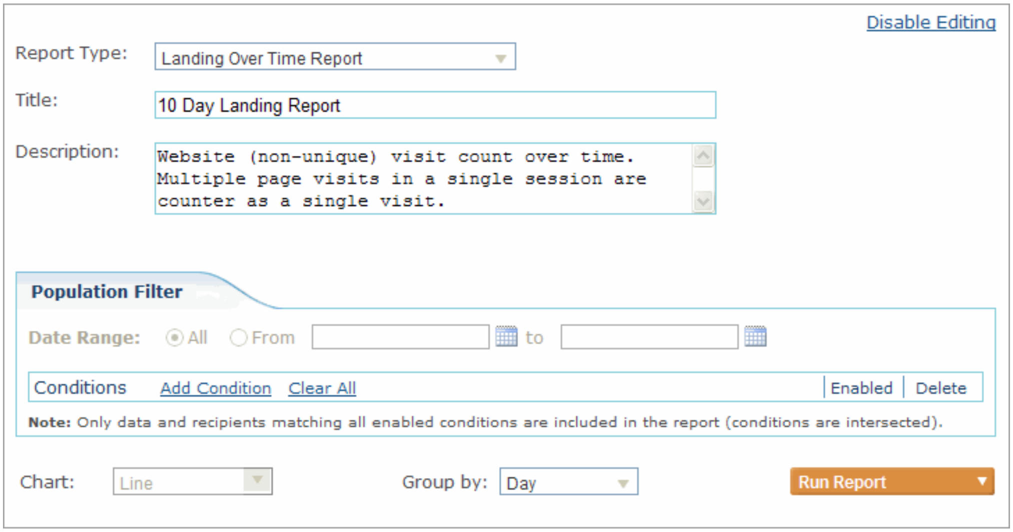
In this example, we would like to check the website visits during the last 10 days.

Proceed as follows:

1. In the **Reports** pane, click the **Enable Editing** link (see Figure 21 on page 33).
2. In the Reports tree, select **General Reports** > **Web** > **10 Day Landing Report**.

   The **Report Editor** page is displayed (Figure 41).

Figure 41: Landing Over Time Report – Report Definition



3. Click **Run Report**.

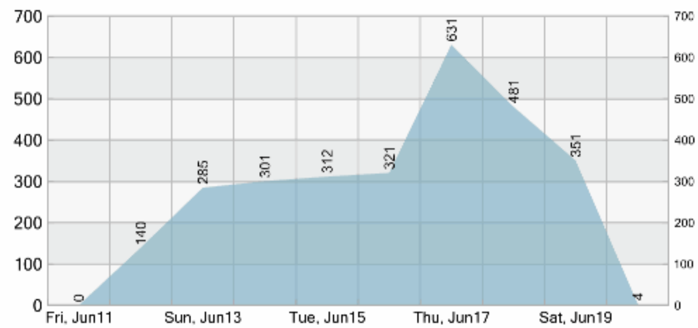
   The Report is displayed:

Figure 42: Landing Over Time Report

10 Day Landing Report

Report Generated: June 20, 2010 13:35 GMT

Website (non-unique) visit count over time. Multiple page visits in a single session are counter as a single visit.



Total Event Count: 2826

Time	Non-Unique Landing Count	Percent
Fri, Jun11	0	0.00%
Sat, Jun12	140	4.95%
Sun, Jun13	285	10.08%
Mon, Jun14	301	10.65%
Tue, Jun15	312	11.04%
Wed, Jun16	321	11.36%
Thu, Jun17	631	22.33%
Fri, Jun18	481	17.02%
Sat, Jun19	351	12.42%
Sun, Jun20	4	0.14%

The *X* axis of the graph specifies the time intervals, whereas the *Y* axis counts the website visits.

According to the graph, the first website visits have been observed starting from June 12th. Then, on June 17th there was a peak in website visits (22.33%). After this date, the number of website visits started to decline.

Population Report

A Population Report is used to count the individual members of a specified population. For example: counting the recipients, for whom a postcard was produced, counting the number of people landing, and counting the number of women who have purchased the product offered. This information can be then grouped by an attribute, for example: grouping by recipient country.

Using the above example (see page 59) we will test which offering is a better incentive to visit the RURL Page. We need to count the population that responded to the charger and the population that responded to the headset, and compare the results. This query is performed by using the Population Report (which is available to all users, except for Analysts using the Standard Service Level).

To count the two populations (Headset vs. Charger) and answer our query, we need to modify the Population Report as follows:

- *Create a Population Filter*—add *conditions* that pinpoint the relevant population, based on a Campaign-related *event*. In this case, the event of interest is a *web event*; more specifically, a *page visit*. This filter allows us to select only people who visited the website.
- *Group*—segment the filtered population by the Recipient-Attribute we are analyzing. In this case, the Recipient-Attribute we are interested in is the *Offering*: Headset or Charger. The grouping instructs the application to count the population separately for each segment.

Proceed as follows:

1. In the Reports tree, select **General Reports** > **Blank** > **Population Report**

   The **Report Editor** page displayed (Figure 36 on page 51).

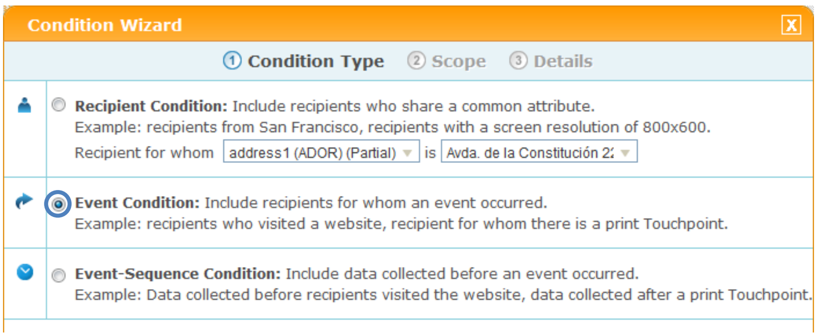
2. Define the **Date Range**. You can either select **All** to display all the results in the report or narrow the Date Range by specifying the start and end time in the **From** and **to** fields, respectively. Click the Calendar icons to select the date. If you only select the start date and leave the end date empty, the latter is automatically updated to “Latest”. Vice a versa. If you only select the end date and leave the start date empty, the latter is automatically updated to “Earliest”.

3. Click **Add Condition**.

   The **Condition Wizard** is displayed, showing the **Condition Type** page (Figure 43).

***Note:** After making each selection in the Condition Wizard, wait for the page to be refreshed with relevant options (for example, after selecting a Condition Type, wait for the page to be refreshed with an enabled "Next" button). The following figures show each page after it has already been set with the required selections.*

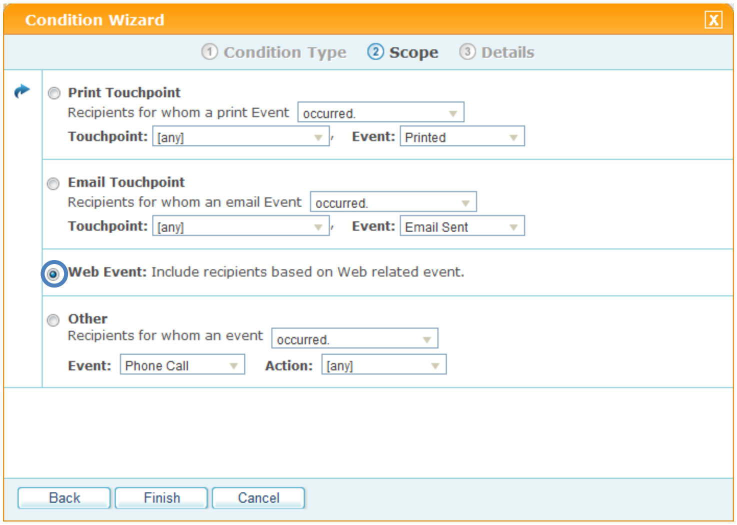
Figure 43: Condition Wizard—Condition Type page (Event Condition)



4. Select **Event Condition** and click **Next**.

   The **Scope** page is displayed (Figure 44).

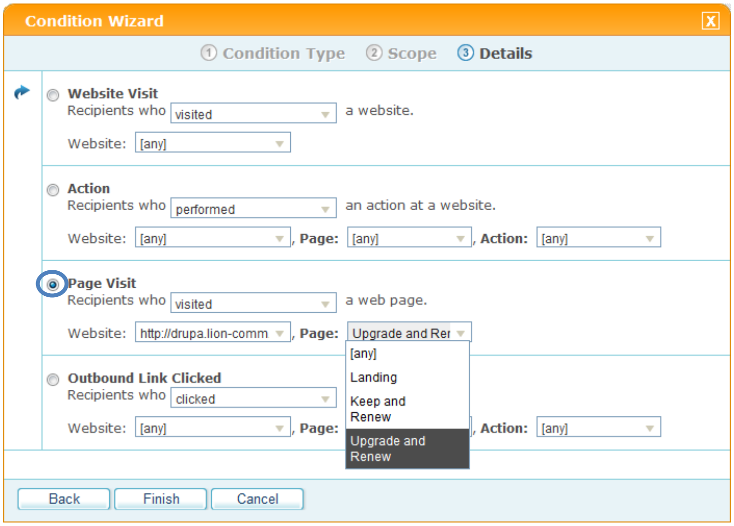
Figure 44: Condition Wizard—Scope page (Web Event)



5. Select **Web Event** and click **Next**.

   The **Details** page is displayed (Figure 45).

   Figure 45: Condition Wizard—Details page (Web Event)



6. Select **Page Visit** and then specify the following:

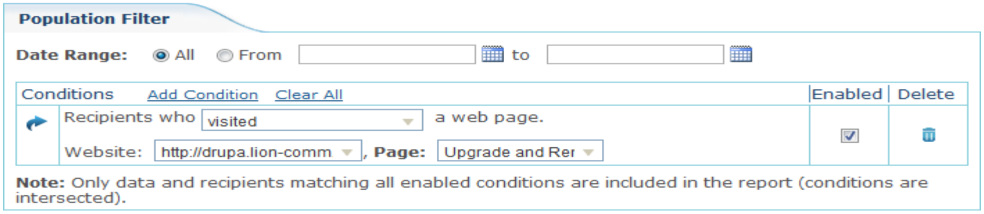
   a. From the **Website** drop-down list, select **http://drupa.lion-comm.com**

   b. From the **Page** drop-down list, select **Upgrade and Renew**.

   c. Click **Finish**.

   The filtering condition is now defined (Figure 46); all that is left to do is to specify how to segment (group) the data.

   Figure 46: Basic Usage—Filtering Condition



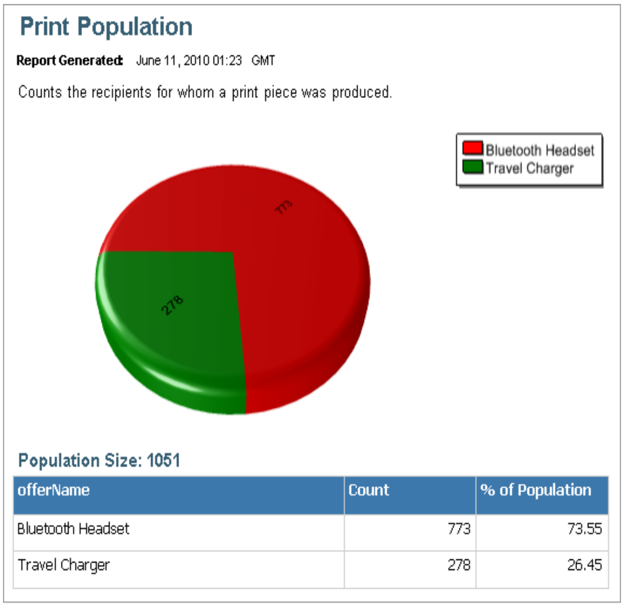
d. From the **Group by** list, select **OfferName (ADOR) (Partial)**.

e. Click **Run Report to** generate a report based on the full data.

Note: *In the first run, the report generation may take a bit longer, since the reporting system needs time to load.*

The report output is displayed (Figure 47).

Figure 47: Basic Usage Example— Population Report, Grouped by Offering



offerName	Count	% of Population
Bluetooth Headset	773	73.55
Travel Charger	278	26.45

The Custom Report Title and Description are displayed in the Population Report output. The Report specifies both the number (**Count**) and the percentage (**% of Population**) of people in each segment of the selected Recipient-Attribute (in this case, **OfferName**).

The **Valid Through** field specifies the date and time of the report creation.

As you can see, a total of **1051** postcard recipients have visited their **Upgrade and Renew** page:

- **773** recipients – **73.55%** of the report population – received the **Bluetooth Headset** offering
- **278** recipients – **26.45%** of the report population – received the **Travel Charger** offering

Note: *The Population Report has no reference to individual contacts. To get a reference to the recipient's ID in your database, use the Population List Report (page 67)*

This scientific analysis of the Campaign results clearly determines that the Bluetooth Headset is significantly more effective than the Travel Charger as an upgrade incentive. Now you know exactly how to refine your large-scale Campaign and ensure you get a substantial improvement in ROI: use the Bluetooth Headset as your offering, and advertise with confidence!

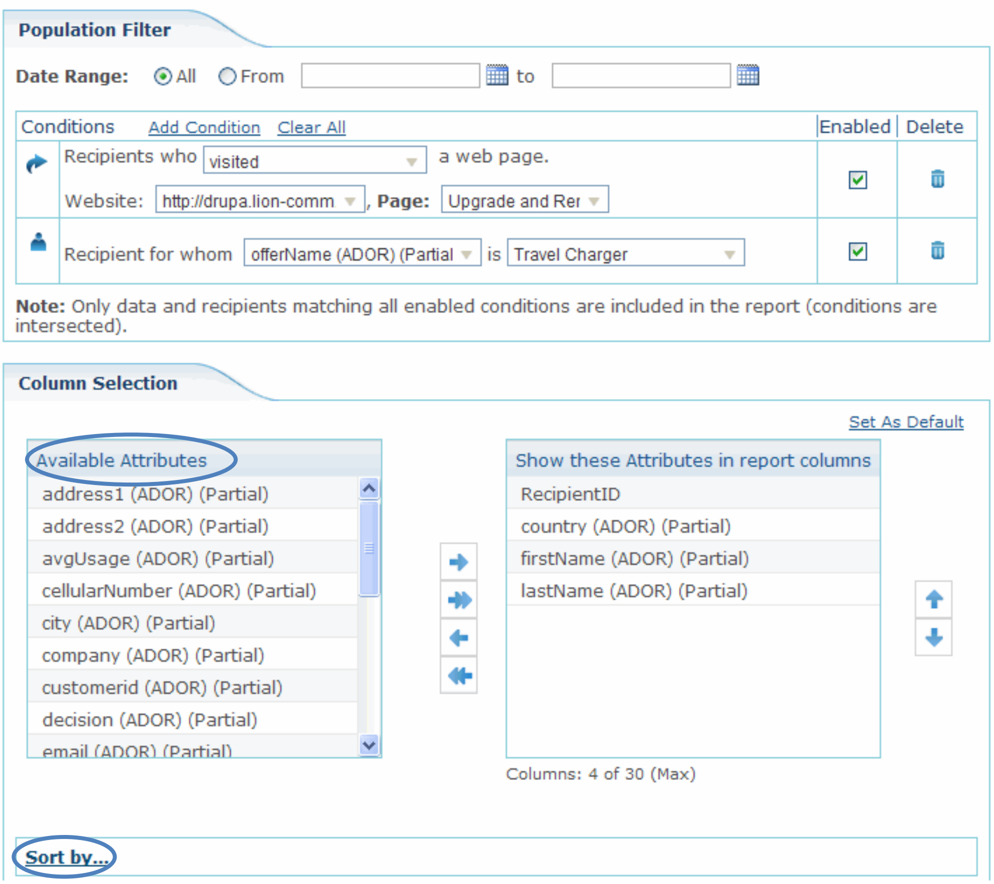
Population List Report

This report provides a drill-down listing of all recipients (for example, customers or prospects) participating in a given Campaign, who pass the population filter. A report may or may not have filtering criteria applied. If there is no filtering, the complete Campaign population is listed.

Note: *The Recipient IDs listed in the report results match the IDs of the recipients in your customer database, which serves as uProduce Data Source.*

For the reports columns, you may choose up to thirty of the **Available Attributes** that have been tracked for the filtered population. An Attribute may be a *recipient* detail, such as first name, email or gender, or an *Event* detail, such as an IP address or a web-browser type. You may specify the order in which the chosen attributes are listed, and choose up to four columns by which the data is sorted. For example, when analyzing the Lion Communications Campaign, you may generate a Population List Report that shows four attributes, in the following order: **RecipientID**, **country**, **firstName** and **lastName** (Figure 48).

Figure 48: Population List Report



In this example, we would like to obtain a list of all Recipients that visited the “Update and Renew” page of the Lion Communications web page and selected a Travel Charger.

To generate a Population List Report:

1. From the **General Reports** tree, choose **Blank** > **Population List Report.**

   The **Population List Report** is displayed, consisting of three main sections: **Population Filter**, **Column Selection** and **Sort by...** (Figure 48 on page 68).

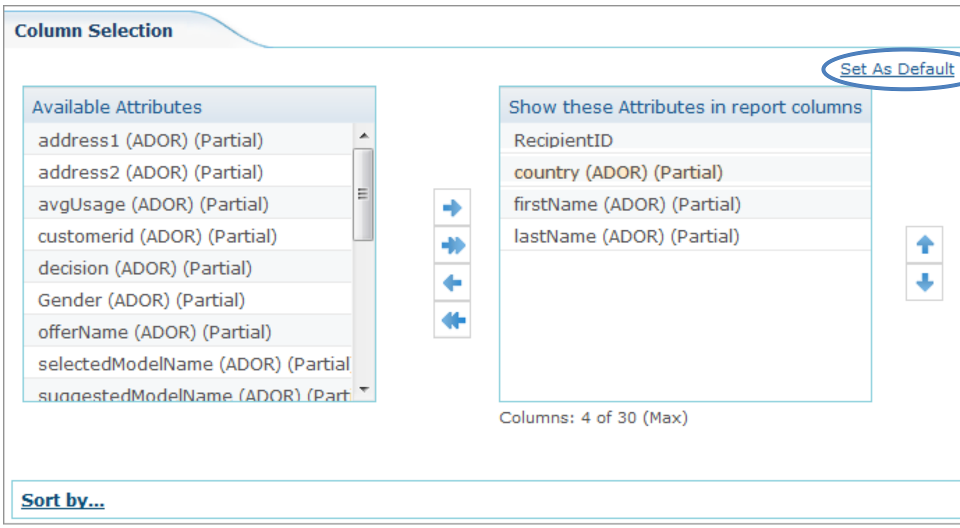
   You can also drill down from an existing report by modifying the Report Type selection from **Population Filter** to **Population List Report**.

2. Define the **Date Range**. You can either select **All** to display all the results in the report or narrow the Date Range by specifying the start and end time in the **From** and **to** fields,

respectively. Click the Calendar icons to select the date. If you only select the start date and leave the end date empty, the latter is automatically updated to "Latest". Vice a versa. If you only select the end date and leave the start date empty, the latter is automatically updated to "Earliest".

3. In the **Population Filter** section, set the desired **Conditions**, by clicking **Add Condition** and following the **Condition Wizard** (for detailed instructions, see Population Filter on page 58).
4. In the **Column Selection** section, perform the following operations:
   a. Select the Attributes to be listed in the report from the list of **Available Attributes.** You may select multiple Attributes simultaneously (using the Shift and Ctrl keys).
   b. To add the Attributes to the **Show these Attributes in Report Columns** list, click the arrow pointing right (). Similarly, to remove an Attribute from this list, click the arrow pointing left ().You can also move Attributes between the two panes by clicking an Attribute, while holding down the left mouse key and dragging it.
   c. To control the order of the columns in the report result, select the Attribute you wish to move and click the up or down arrows (). You can also move Attributes by clicking an Attribute to select it, while holding down the left mouse key, drag the Attribute up or down the list.
   d. To add all the Attributes to the **Show these Attributes in Report Columns** list, click the double arrow pointing right (). Similarly, to remove all the Attributes from this list, click the double arrow pointing left ().
   e. To make your current column selection the default for any **Population List Report** in the Campaign, click the **Set As Default** link. The saved settings apply to all users analyzing this Campaign.

Figure 49: Population List Report— Multiple Column Selection

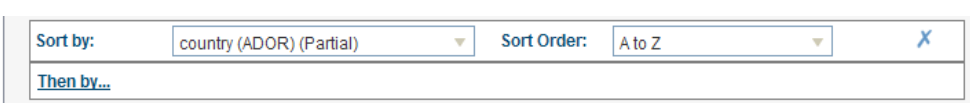


6. In the **Sort by...** section (at the bottom of the report, as shown in Figure 48), define the columns by which the results are sorted:

   a. Click the **Sort by...** link.

      The **Sort by** and **Sort Order** drop-down lists are displayed (Figure 51).

Figure 50: Population List Report— Sort by Attribute and Sort Order

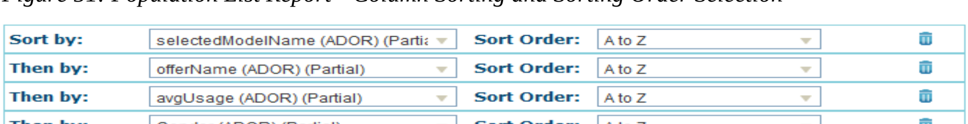


   b. From the **Sort by** list, select first Attribute by which you wish to sort the data.

   c. From the **Sort Order** list, determine whether the order is ascending (A to Z) or descending (Z to A).

   d. To define an additional Attribute, click the **Then By...** link. You may set up to four Attributes by which the report is sorted (Figure 51).

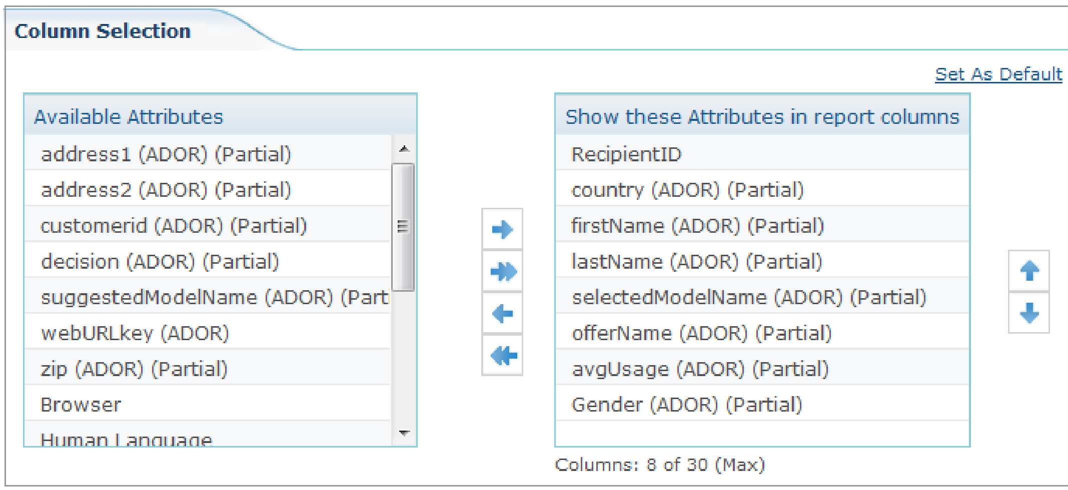
Figure 51: Population List Report—Column Sorting and Sorting Order Selection



e. To remove an Attribute from the list, click the icon to its right.

To sort by an Attribute, you must include it in the ***Show these Attributes in Report Columns*** *list. Otherwise, its sort condition is not enforced.*

Figure 52: Population List Report—Add Sort by fields to the Show these Attributes in Report Columns list



6. Click **Run Report**.

The report results are displayed below the report definition (Figure 54).

The entire report is displayed and you have the possibility to browse the report pages using the Pagination toolbar:

Figure 53: Population List Report—Pagination Toolbar

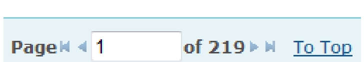


Figure 54: Population List Report —Results on Marketing Console's Webpage

Recipient ID	country	firstName	lastName	selectedModelName	offerName	avgUsage	Gender
10029	Sweden	sara	white		Travel Charger	2438	Women
1003	Sweden	kathryn	harris		Bluetooth Headset	2557	Women
10030	Sweden	andrea	green		Travel Charger	84	Men
10031	UK	lori	cooper		Travel Charger	1051	Women
10032	Sweden	anne	morgan	LIONCOMM 4000	Bluetooth Headset	826	Men
10033	France	jeff	howard	LIONCOMM 5000	Bluetooth Headset	2950	Men
10034	Sweden	ruby	butler		Travel Charger	941	Men
10035	Sweden	benjamin	price	LIONCOMM 5000	Bluetooth Headset	1565	Men
10036	Ireland	donald	bell	LIONCOMM 5000	Bluetooth Headset	899	Men
10037	France	janice	butler		Travel Charger	1255	Women
10038	UK	ryan	bailey	LIONCOMM 7000	Bluetooth Headset	992	Women
10039	UK	anna	butler		Travel Charger	2010	Men
1004	France	dennis	cook		Travel Charger	617	Women
10040	France	cheryl	young		Bluetooth Headset	419	Men
10041	UK	rose	young	LIONCOMM 5000	Travel Charger	2502	Women

Dragging and dropping of columns in the Population List report adds the dragged-and-dropped columns to the bottom of the list.

Exporting the Population List Report

To efficiently use the Population List Report, it is recommended to export the results to PDF or Excel, by clicking **Export to PDF** or **Export to Excel**, respectively (for detailed instructions, see Exporting Report Results on page 42.

The exported list has the following benefits (Figure 55):

- Viewing all columns and records—the Marketing Console web site shows only the columns and recipient records that fit on the page, while the exported report shows all columns.
- Integration with other systems—the PDF and Excel formats allows you to easily incorporate the data into other systems (for example: your CRM solution).

Figure 55: Population List Report —Example Results Exported to Excel

A B C D E F G H I J K

Population List Report

Report Generated: June 13, 2010 14:11 GMT

Lists the recipients who comprise the population.

Note: Only the first 10,000 rows of data are available for this report.

Click a recipient's Recipient ID for a detailed list of events related to this person.

Population Size: 10065

Recipient ID	country	firstName	lastName	selectedModel Name	offerName	avgUsage	Gender
10029	Sweden	sara	white		Travel Charger	2438	Women
1003	Sweden	kathryn	harris		Bluetooth Headset	2557	Women
10030	Sweden	andrea	green		Travel Charger	84	Men
10031	UK	lori	cooper		Travel Charger	1051	Women
10032	Sweden	anne	morgan	LIONCOMM 4000	Bluetooth Headset	826	Men
10033	France	jeff	howard	LIONCOMM 5000	Bluetooth Headset	2950	Men
10034	Sweden	ruby	butler		Travel Charger	941	Men
10035	Sweden	benjamin	price	LIONCOMM 5000	Bluetooth Headset	1565	Men
10036	Ireland	donald	bell	LIONCOMM 5000	Bluetooth Headset	899	Men
10037	France	janice	butler		Travel Charger	1255	Women
10038	UK	ryan	bailey	LIONCOMM 7000	Bluetooth Headset	992	Women
10039	UK	anna	butler		Travel Charger	2010	Men
1004	France	dennis	cook		Travel Charger	617	Women
10040	France	cheryl	young		Bluetooth Headset	419	Men
10041	UK	rose	young	LIONCOMM 5000	Travel Charger	2502	Women

Recipient Interaction History Report

When viewing a Population List report displaying a list of Campaign responders, users can click on any specific responder in the report and get a full list of all their individual activities during the Campaign. For example, Email was sent to recipient; Email was opened, RURL website was visited and button was clicked.

In our example Campaign, we would like to further understand the list of events that caused a particular recipient to land in the website. To do so, we would like to see the complete list of events for that recipient.

Clicking the link in the **Recipient ID** column of the report table opens the list of events for that recipient.

Figure 56: Population List Report —Recipient Interaction History

Event list for Recipient: 10041

Number of events: 9

Date	Event Type	Touchpoint	Action	Website	Page	IP
30 May 2010 10:55	Printed	RURL Print Piece				
30 May 2010 12:31	Email Sent	RURL Email				
04 Jun 2010 19:48	Email Opened	RURL Email				
04 Jun 2010 19:48	Page Visit			http://drupa.lion-comm.com	Landing	82.80.220.56
04 Jun 2010 19:49	Performed Action		Keep Clicked	http://drupa.lion-comm.com	Landing	82.80.220.56
04 Jun 2010 19:49	Page Visit			http://drupa.lion-comm.com	Keep and Renew	82.80.220.56
04 Jun 2010 19:51	Performed Action		Keep Confirmed	http://drupa.lion-comm.com	Keep and Renew	82.80.220.56
04 Jun 2010 19:51	Kept					
04 Jun 2010 19:51	Renewed					

The Recipient Interaction History report in the example above shows the following events:

- 30 May 2010 10:55: a postcard with a personalized RURL was sent to the recipient.
- 30 May 2010 12:31: an email with a personalized RURL was sent to the recipient
- 4 June 2010 19:48: the recipient opened the email
- 4 June 2010 19:48: the recipient visited the Lion Communications “Upgrade and Renew” web page.
- 4 June 2010 19:49: the recipient clicked the **Keep** link, thus choosing to keep the current phone model.
- 4 June 2010 19:49: the recipient visited the page
- 4 June 2010 19:51: the recipient confirmed the “Keep” action.
- 4 June 2010 19:51: the recipient’s request to keep the current phone model has been confirmed.
- 4 June 2010 19:51: the recipient call plan has been renewed.

Marking Recipients for Next Campaign Phases and Mass Update (“Write Back”)

Marketing Console enables users to mark recipient records meeting specific criteria so recipients can be easily selected to receive certain follow-up communications within a Campaign. The Write Back feature also allows users to globally update any database field with new information based on report findings.

Going back to our example of Lion Communication Campaign, we realize that the recipients, who selected the Travel Charger, are probably in desperate need of phone power. We, therefore, want to send them a follow up postcard offering a discount price for a spare battery or an additional charger.

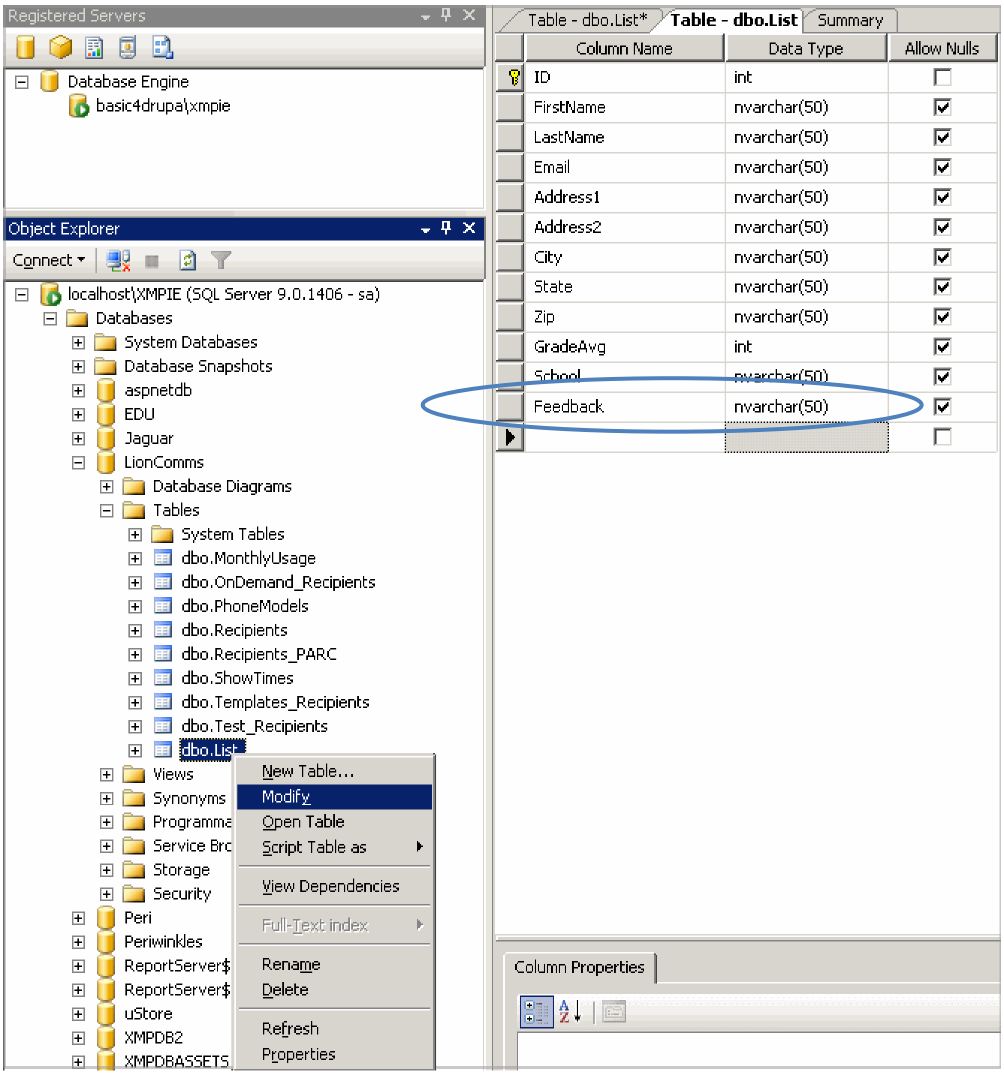
We want to mark those recipients for the next job. We will therefore need to write back an indicator to a flag. The flag will be a field in the Recipient List database. The indicator can be basically any value we want to designate to mean production in the next job.

To write back to the Recipient List Database:

***Note**: Steps 1-2 can be performed before the Campaign is launched.*

1. In the Campaign Data Source, add a new column in the Recipient List table and give it an arbitrary name. A meaningful name for flagging recipients for feedback purposes is “Feedback”. In fact, it is a good practice to add this field to any cross-media Plan to be able to easily use the Write Back functionality in the Campaign.
    a. In the SQL Server Management Studio, go to the Campaign Data Source, right-click the Recipient table and click **Modify**.
    b. In the **Table** definitions tab, add a new column called “Feedback” with Data Type “nvarchar (50)”.

Figure 57: SQL Server Management Studio – Modify table

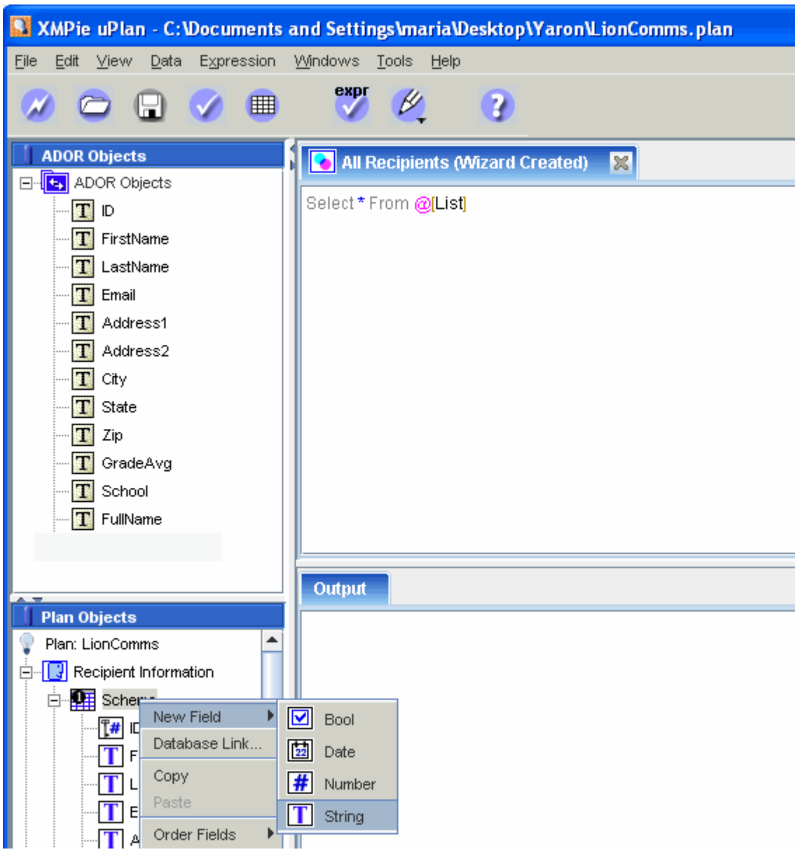


2. In uPlan, add a Read-Write ADOR Object called “Feedback”.

   a. Open the Campaign Plan.

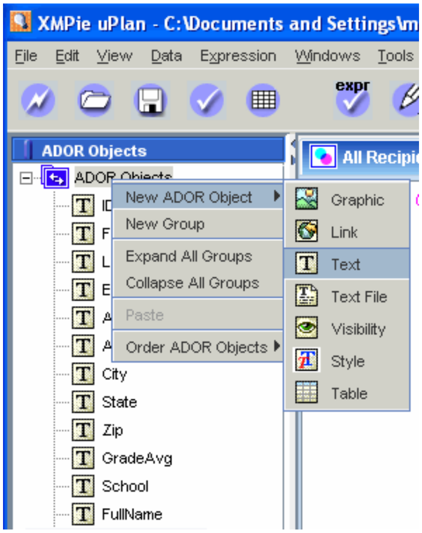
   b. In the **Plan Objects** area > **Recipient Information** >**Schema**, right-click to open the context menu and select **New Field** >**String** and enter the name of the new Plan Object (for example: Feedback)

Figure 58: uPlan – Add New Plan Object



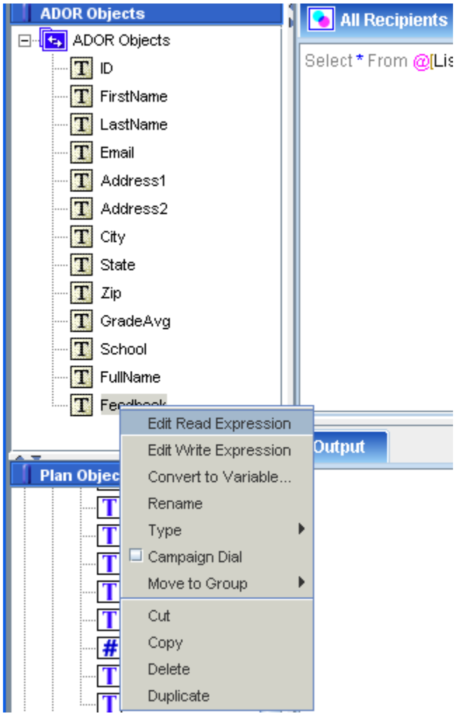
c. In the **ADOR Objects** area, right-click ADOR Objects node, and select **New ADOR Object>Text** in the context menu and enter the name of the new ADOR Object (for example: Feedback).

Figure 59: uPlan – Add New ADOR Object



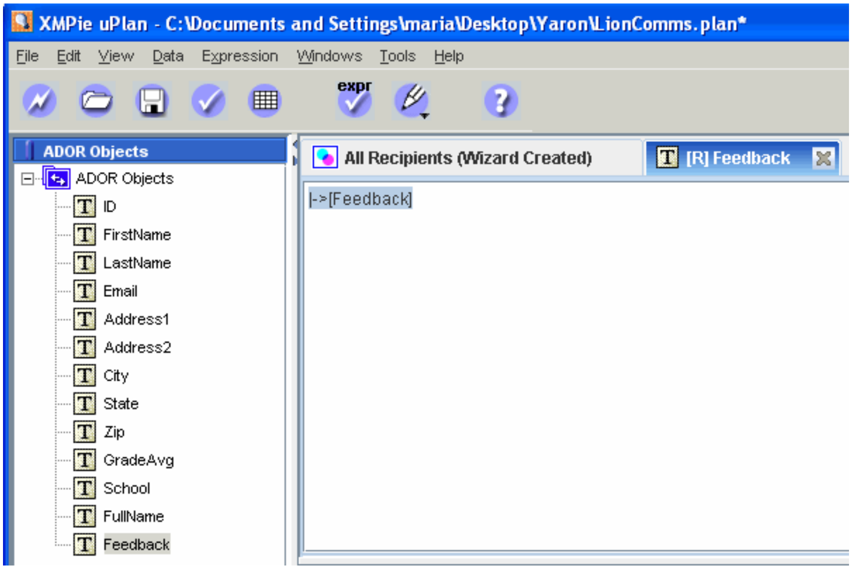
d. Right-click the new **Feedback** ADOR Object and select **Edit Read Expression**.

Figure 60: uPlan – Edit Read Expression



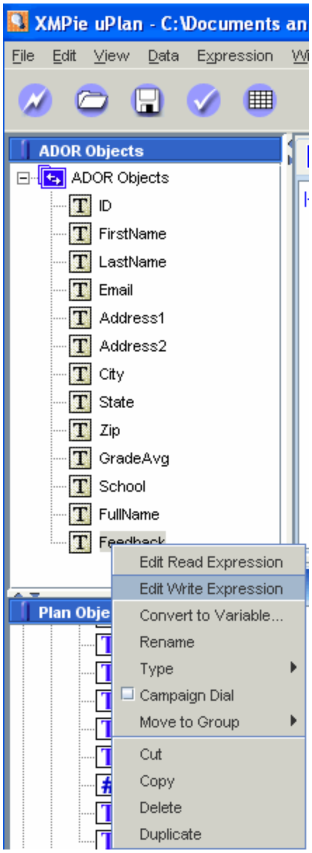
e. In the [R] <ADOR Object Name> tab, enter the Read Expression, as follows:

Figure 61: uPlan – Edit Read Expression



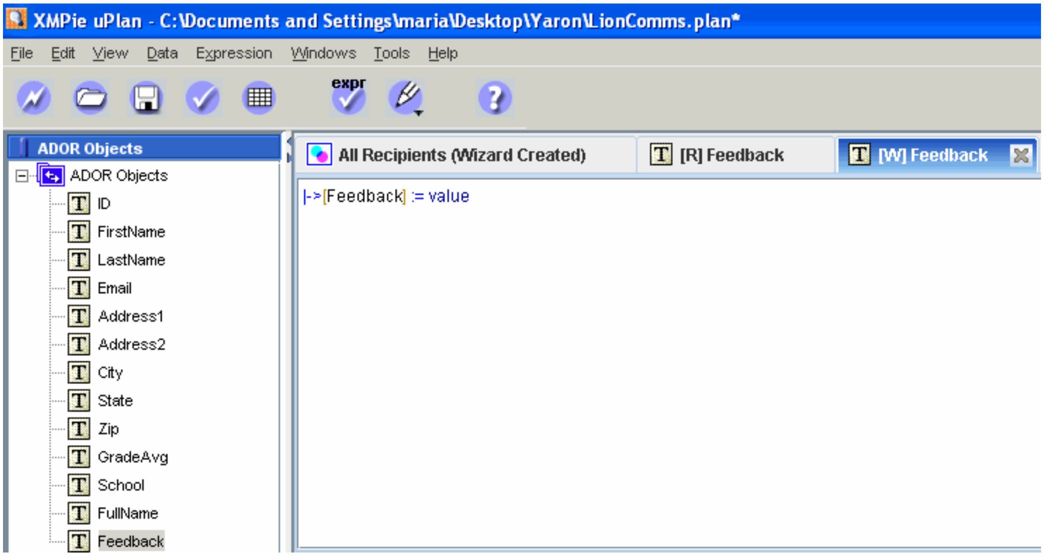
f. Right-click the **Feedback** ADOR Object and select **Edit Write Expression**.

Figure 62: uPlan – Edit Read Expression



g. In the [W] <ADOR Object Name> tab, enter the Write Expression, as follows:

Figure 63: uPlan – Edit Write Expression



h. Save the Plan.

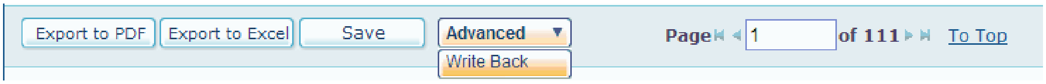
***Note**: Steps 3-5 can be performed only after tracking data has been accumulated.*

3. In the Marketing Console, run a Population List Report with a Population Filter that filters precisely the recipients that you are interested in. In our example, these are the recipients who landed in the website and whose suggested offer is Travel Charger. We would like to mark them for the next release.

4. Once the Population List Report is generated, run the Write Back:

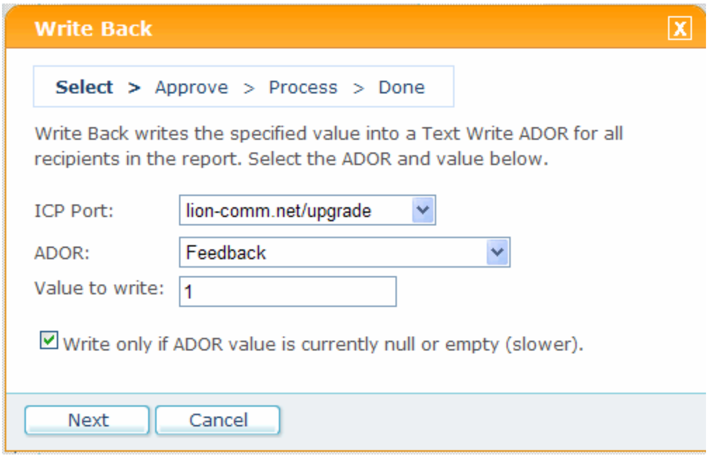
   a. From the Population List **Report Editor**, select **Advanced** > **Write Back**.

   Figure 64: Population List Report —Write Back button

   The **Write Back** dialog is displayed:

Figure 65:—Write Back Wizard – Select Step



b. In the **ICP Port** field, select the ICP Port to which you wish to write the new ADOR Object value. Typically, you should enter the ICP Port used for your Campaign website.

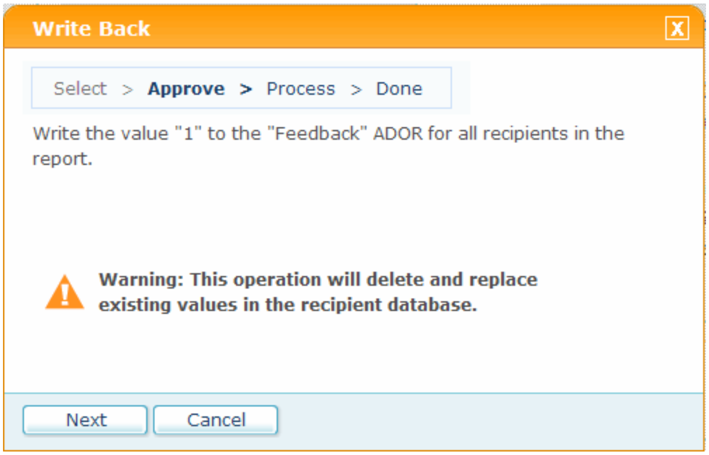
c. In the **ADOR** field, select the "Feedback" ADOR Object.

d. In the **Value to write** field, enter a value according to which you will identify the recipients that will be used for the next Campaign phase (for example, enter "1").

e. To protect fields against an erroneous selection and to validate that there is no current value for the record before writing to it, the **Write only if ADOR value is currently null or empty (slower)** checkbox should be checked (it is checked by default). If, however, you feel confident that you selected all values correctly, and know that you want to override the current values of the ADOR Object for the selected recipients, you should uncheck this checkbox.

f. Click **Next**. The **Approve** step of the Write Back Wizard is displayed asking you to confirm the Write Back:

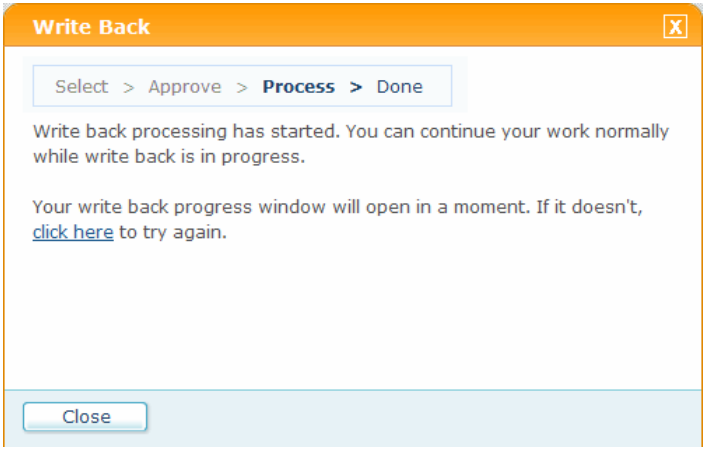
Figure 66:Write Back Wizard – Approve Step



g. Click **Next** to proceed.

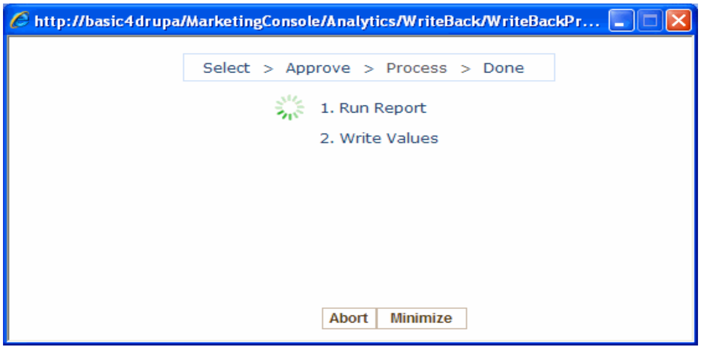
h. The **Process** step of the Write Back Wizard is displayed notifying you that the processing has started in a new browser window.

Figure 67: Write Back Wizard – Process Step



At the same time, the Write Back process starts to run in a new browser. You will see the progress wheel in the **Process** step of the Write Back Wizard. You can continue to work normally while the Write Back is in progress.

Figure 68: Write Back Wizard —Process Step



i. Once the Write Back procedure is completed, the **Done** step of the Write Back Wizard is displayed notifying you about the Write Back success/failure.

j. Click **Close** to quit the Wizard.

5. In uProduce, in the **Process** page (for Print Documents) or **Email Activity** page (for Email Documents), filter the recipients who have the '1' value in the Feedback field.

   To filter the recipients:

   a. Go to the **Campaigns** page and create a new Document or select an existing Document you wish to update.

***Note**: For more information on creation and production of Print and Email Documents, see uProduce User Guide:*

- *Working with Print Documents: Chapter 3 – Account and Campaign Management, "Working with Documents" section.*
- *Email Activity Creation: Chapter 10 – Working with Email, "Creating an Email Activity" section*
- *Print Documents Production: Chapter 5 - Producing Print Output Files (Process Page)*

   b. In the **Recipients** section of the **Process** page (for Print Documents) or of the **Email Activity** page (for Email Documents), select the **Recipients Data Source,** check the **Query** radio button and manually enter an SQL query. The query should be as follows:

   SELECT * FROM *RecipientListTableName* WHERE *WriteBackFeedbackFieldName* ='*ValueToWrite*'.

For example, assume you have a table named **Recipients** that contains the **Feedback** field that has been added using the Marketing Console Write Back functionality. To print/send as an email the job only for recipients that were selected for feedback, enter the following query:

```
SELECT * FROM Recipients where Feedback ='1'.
```

Figure 69: uProduce Process page – Recipients Query

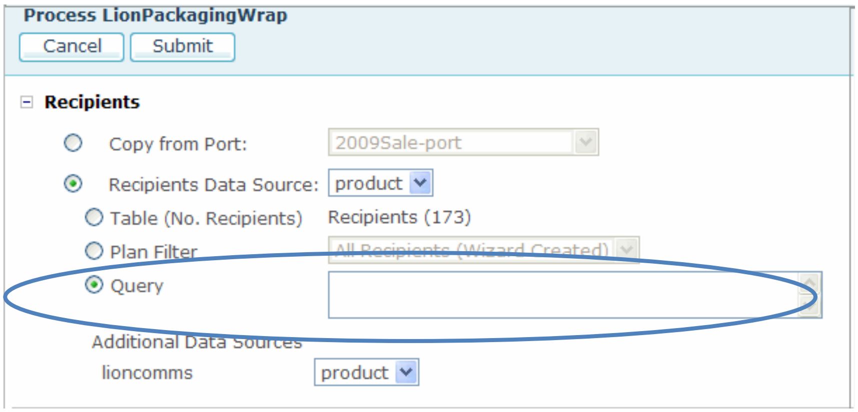
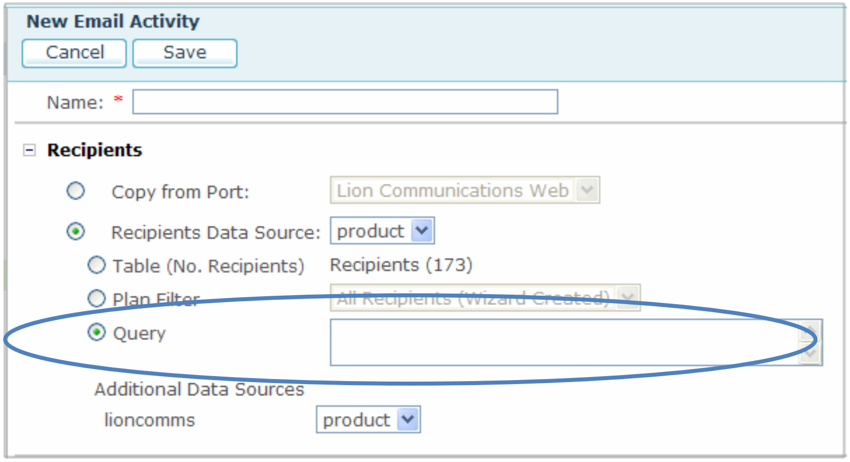


Figure 70: uProduce Email Activity page – Recipients Query



Population Filter

A filter is a selector of a Population. The report is generated only for the population that passes the filter. The filter is your primary tool for defining in detail the analysis you wish to perform, that is: the report that you wish to run.

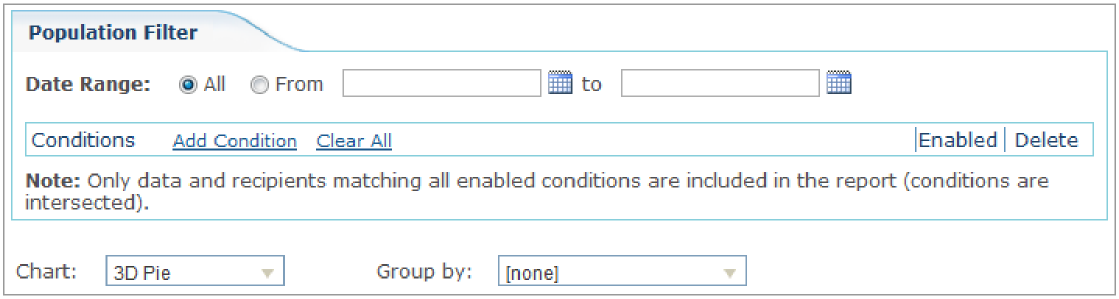
The filter is applied to the entire Campaign population (the input), and generates the output population: the population that passes the filter (for example, 447 people who visited their RURL Landing Page).

All individuals that belong to any of the Campaign jobs are, by definition, the entire Campaign population. This means that for a typical cross media Campaign, which begins with a wide postcard print and then narrows down to landing on an RURL Landing Page, the entire Campaign population is identical to the original print postcard population. In such a Campaign, adding a condition that filters just the print postcard population is redundant, because the entire population would pass the filter.

Note: *If no filtering is defined, the report population is the entire Campaign population.*

As explained in the Reports Overview section (page 38), the Population Filter is part of the report definition (Figure 71).

Figure 71: Population Report Definition—Population Filter



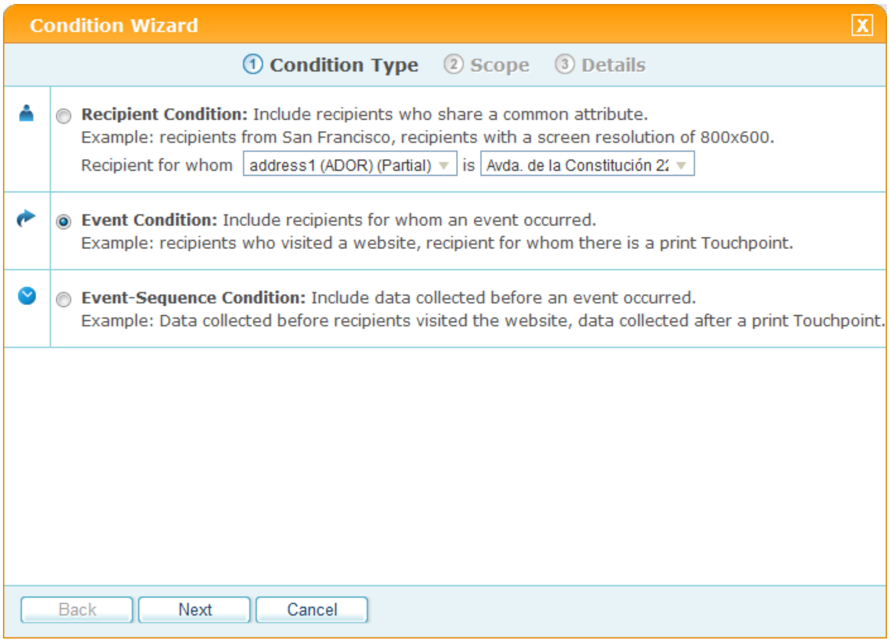
The filter is defined as a series of conditions, listed in the **Conditions** pane. Only individuals that match all the conditions pass the filter. In other words, each condition must be satisfied inclusively by every individual that is selected into the output Population.

The Conditions can be divided into two categories:

- Basic Population Conditions (page 88)
- Advanced Population Conditions (page 95)

New conditions are created by clicking **Add Condition**, which launches the **Condition Wizard** (Figure 72).

Figure 72: Condition Wizard—Condition Type (Event Condition)



***Note:** Only relevant tracked information appears in the drop-down lists. If the Campaign has been marked for tracking, but the actual events to be tracked have not yet occurred, the drop-down lists do not include these events.*

The **Condition Wizard** is used to create filters based on one of the following attributes:

- A Recipient-Attribute — a **Recipient Condition**
- An Event-Attribute — an **Event Condition**
- A specific sequence of events — an **Event Sequence Condition**

When you define a condition, the **Condition Wizard** guides you through the steps, providing common examples that demonstrate the use of each option. There may be up to three steps (**Report Type**, **Scope** and **Details**), depending on the type of condition you are setting.

Basic Population Conditions

There are three types of conditions in the **Condition Wizard**: **Recipient**, **Event** and **Event Sequence**. This section describes the more common conditions: Recipient Condition (below) and Event Condition (page 90).

The Event Sequence condition is discussed later on, in the Advanced Population Conditions section (see Event Sequence Condition on page 97).

Recipient Condition

This filter condition selects only the population that has the specified Recipient-Attribute. A Recipient-Attribute defines the recipient's details. These include:

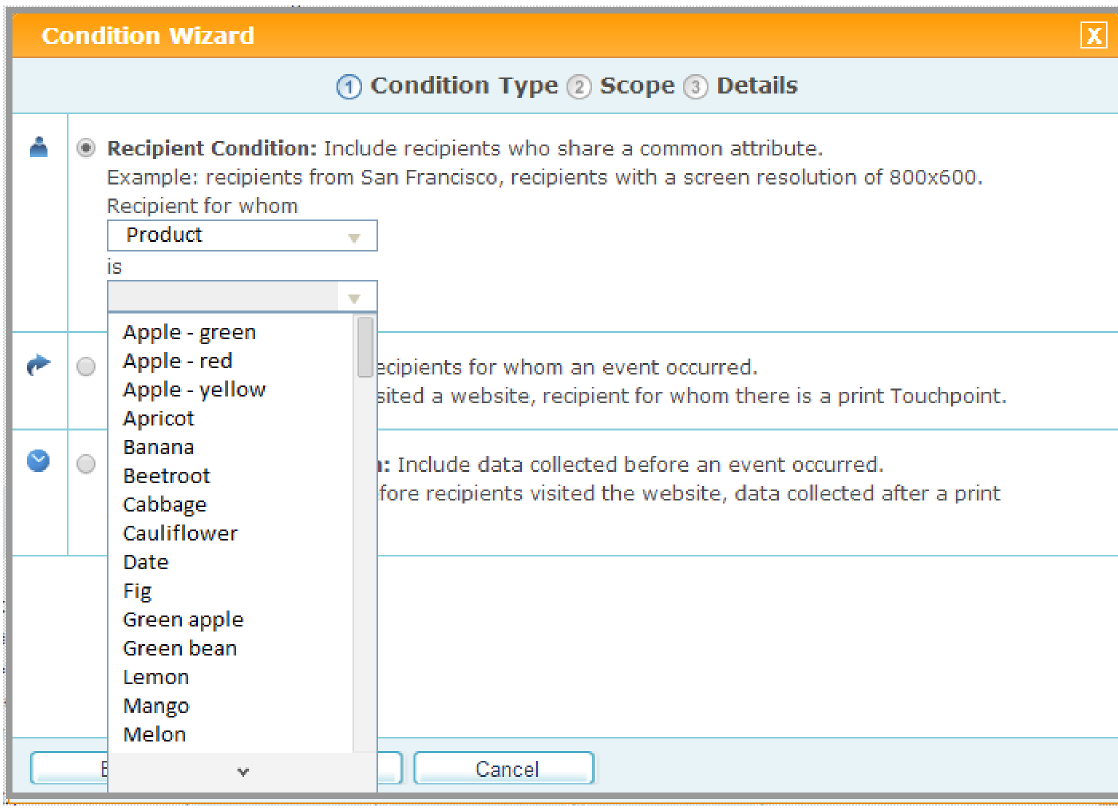
- The Campaign's ADOR Objects, which have been marked for tracking in the uProduce Dashboard (for example, gender, city, loyalty-group membership, preferred product-color etc.). These Recipient-Attributes are indicated by an "(ADOR)" suffix, for example, "City (ADOR)".
- User information collected from a web-browser (for example, browser type, Operating System, whether the browser is Flash Enabled etc.), or from an external system that integrates with the Marketing Console (for example, a call center that inputs the representative taking the call).

Note: *It is highly recommended to configure the Tracked ADOR Object values only once, before any job is submitted (see Configuring a List of Tracked ADOR Object Values on page 13). ADOR Object values that are added or removed during the Campaign's lifetime (i.e. values that do not exist for all Campaign jobs) are called "Partial attributes". Partial attributes are indicated in the Marketing Console's drop-down lists by the suffix "(Partial)", for example: "City (ADOR) (Partial)". Using Partial attributes in your analysis might lead to inaccurate results.*

To set a Recipient Condition:

1. Select the desired Recipient-Attribute from the **Recipient for whom** drop-down list.
2. Select the Recipient Attribute value from the **is** auto-complete drop-down list (Figure 73). Clicking on the arrow when the field is empty shows the first few hundred values. For very long lists, a more efficient way to find the value is to start typing in the field to get a shorter, more specific list to choose from.

Figure 73: Condition Wizard—Condition Type (Recipient Condition)



Note that some Recipient-Attributes may change over time (for example, the preferred product-color may change). The report definition includes a date range (that narrows the Analysis Timeframe), and the Recipient Condition selects only people who still have the required attribute by the *end* of this timeframe.

Event Condition

An *Event* is the occurrence of an action relating to the Campaign (for example, "Postcard Printed", "Email Sent", "Email Received", "Web Page Visited" etc.). Events are created either by the service provider, who is communicating with recipients (for example, by sending them postcards or emails); or by the recipients, who are responding to the Campaign (for example, when they perform actions on a website, reply to emails etc.).

You can set uProduce to track each of these events (see Chapter 2: Tracking Campaign Events). An event is recorded per recipient, for example, a single print job for 100 recipients will yield 100 print events, one for each recipient.

The Population Filter allows you to define an *Event Condition*, which filters the Population based on who has a specific event in their sequence. This Event Condition selects only the population for which the specified event has occurred within the report's date range (i.e. the Analysis Timeframe). For example: the Population defined by "email-sent" event-filtering is the group of individuals to whom the email has been sent successfully.

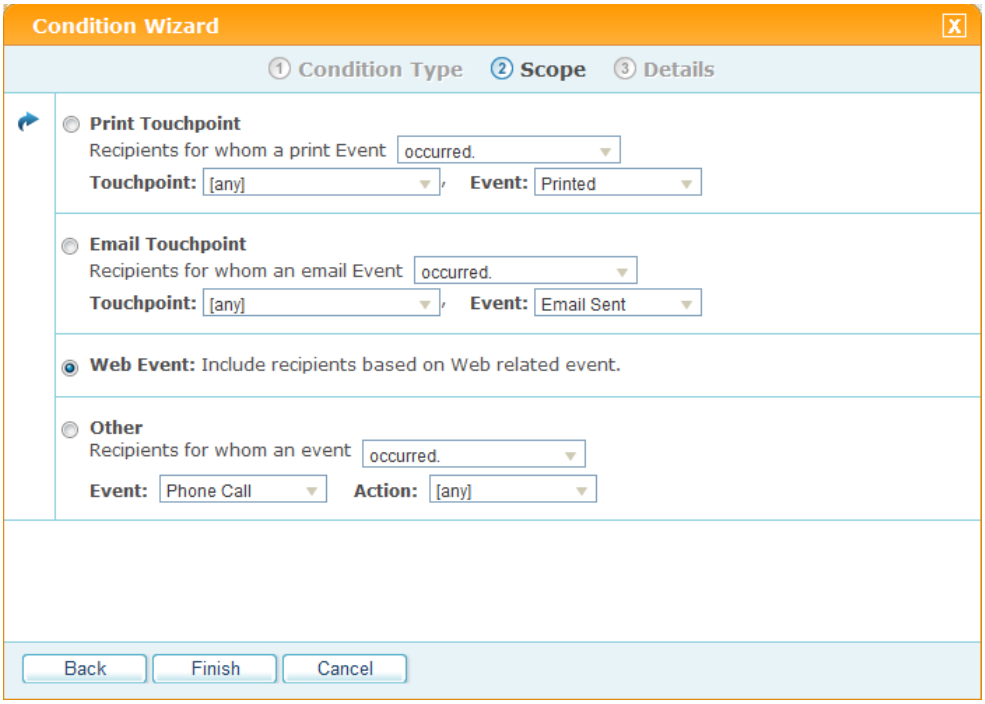
Note: *A Negation Condition also exists; in this case, the condition selects the population for which an event has NOT occurred (within the Analysis Timeframe).*

To set an Event Condition:

1. In the Condition Wizard's **Condition Type** page, select the **Event Condition** radio button and click **Next** (Figure 43 on page 64).

   The **Scope** page is displayed (Figure 74).

Figure 74: Condition Wizard—Scope page (Event Condition)



2. Select if you want the condition to be associated with a Print Touchpoint (page 92), an Email Touchpoint (page 93) or a Web Event (page 93), as shown in Figure 74.
   The following sections explain how to define each of these Event Conditions.

Print Touchpoint

This Event Condition selects recipients that have a Print Event associated with a specific *Touchpoint*.

Touchpoints Overview

“Touchpoint” is a term taken from the business domain. It is the action of interacting with recipients. Example Touchpoints may be “Initial Postcard Mailing” Printed and “Follow-Up” Email-Sent. In these examples, the Touchpoints are “Initial Postcard Mailing” and “Follow-Up”, and they are associated with the “Printed” and “Email-Sent” event-types (respectively).

The same event-type (for example, “Printed”) may be associated with different Touchpoints (for example, “Initial Postcard Mailing” and “Thank You Card”). When filtering data, you can use these Touchpoints to distinguish between otherwise-similar events (for example, distinguish between the “Initial Postcard Mailing” Printed event and the “Thank You Card” Printed event).

A Touchpoint may consist of a single event per-recipient (for example, “Initial Postcard Mailing” Printed); or of multiple events per-recipient (for example, “Follow-Up” Email-Sent; and “Follow-Up” Email Opened[7]”).

XMPie Tracking and Marketing Console gives you the ability to track and analyze every single Touchpoint in your Campaign, by associating it with one or more Campaign *Events*.

As explained in Chapter 2: Tracking Campaign Events, Touchpoint Events are defined and marked for tracking via the uProduce Dashboard (see Configuring Tracking in uProduce on page 12). The **Condition Wizard**’s options reflect these Touchpoint Event definitions.

To set a Print Touchpoint Event Condition:

1. In the **Condition Wizard**’s **Scope** page (Figure 74 on page 90), select the **Print Touchpoint** radio button.
2. Determine whether this is a conformation condition (the default option) or a negation condition, by choosing one of the following:
   - **occurred** (the default option)—selects only recipients for whom this Touchpoint event has taken place, for example, recipients who have received a print postcard.
   - **didn't occur** (the negation option)— selects only recipients for whom this event has NOT taken place, for example, recipients who have not received a print postcard.

---

[7] “Email-Opened” is an example of an event that can be generated by an external system.

3. Select the *name* of the relevant **Touchpoint** from the drop-down list.
   For example, when selecting a Print Touchpoint, you may be choosing between an "Initial Postcard Mailing" and a "Thank You Letter".
4. Select the Event description from the **Event** drop-down list.
   For Print Touchpoints, choose "Printed".
5. Click **Finish** to close the **Condition Wizard**, and view the condition you have created in the **Conditions** pane of the **Population Filter** (Figure 71 on page 87).

Email Touchpoint

This Event Condition selects recipients that have an Email event associated with a specific *Touchpoint* (see Touchpoints Overview on page 92).

To set an Email Touchpoint Event Condition:

1. In the **Condition Wizard**'s **Scope** page (Figure 74 on page 90), select the **Email Touchpoint** radio button.
2. Determine whether this is a conformation condition (the default option) or a negation condition, by choosing one of the following:
   - **occurred** (the default option)—selects only recipients for whom this Touchpoint event has taken place, for example, recipients who have received an email.
   - **didn't occur** (the negation option)— selects only recipients for whom this event has NOT taken place, for example, recipients who have not received an email.
3. Select the *name* of the relevant **Touchpoint** from the drop-down list.
   For example, when selecting an Email Touchpoint, you may be choosing between a "Follow-Up Email" and a "Thank You Email".
4. Select the Event description from the **Event** drop-down list.
   For Email Touchpoints, choose between "Email Sent" and "Email Received".
5. Click **Finish** to close the **Condition Wizard**, and view the condition you have created in the **Conditions** pane of the **Population Filter** (Figure 71 on page 87).

Web Event

A *Web Event* is an occurrence of a Web action relating to the Campaign, such as a Website visit, a button clicked on the web page, etc. For a detailed example of a Web Event (a page visit), see Running a Report on page 38.

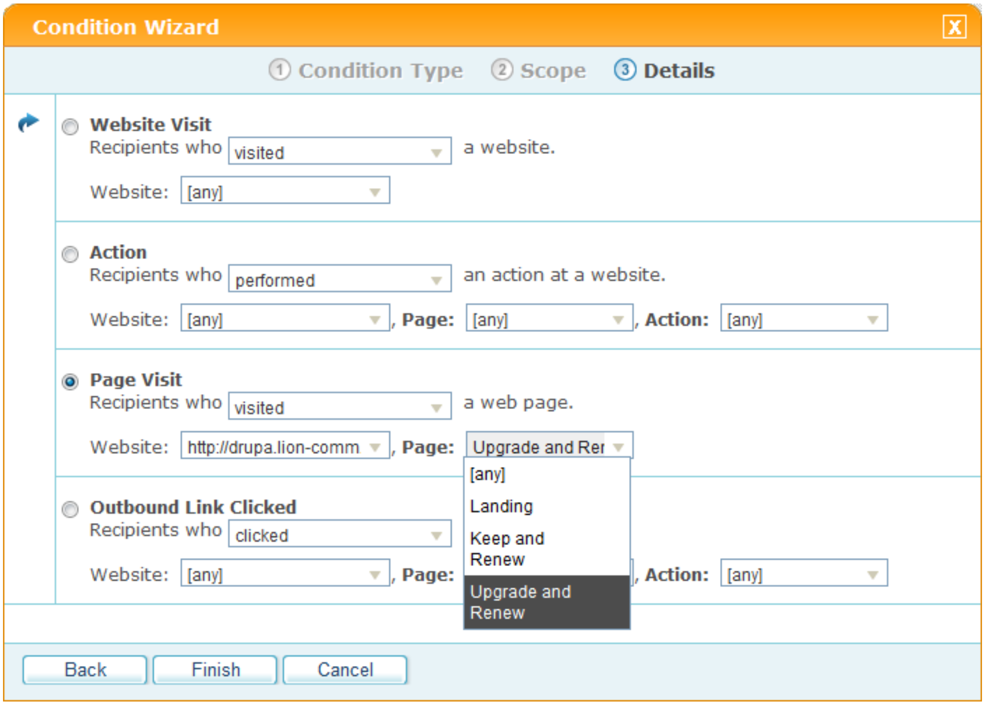
As explained in Chapter 2: Tracking Campaign Events, Web Events are defined (and marked for tracking) via uCreate XM (see Configuring Tracking in uCreate XM on page 20). The **Condition Wizard**'s options reflect these Web Event definitions.

To set a Web Event (or Web Event Sequence) Condition:

1. In the **Condition Wizard**'s **Scope** page (Figure 74 on page 90), select the **Web Event** radio button.

   You can now proceed to define the Web Event details, by clicking **Next** and setting up the **Details** page (Figure 75).

   Figure 75: Condition Wizard—Event Condition: Details page



2. Choose one of the following Web Events:

   - **Website Visit** — recipients browsing to the specified URL
   - **Action** — recipients performing an action, such as a clicking a button, changing the selection in a drop-down list, etc.
   - **Page Visit** — recipients browsing to the specified web page
   - **Outbound Link Clicked** — recipients clicking the specified link (all links are assumed to be outbound).

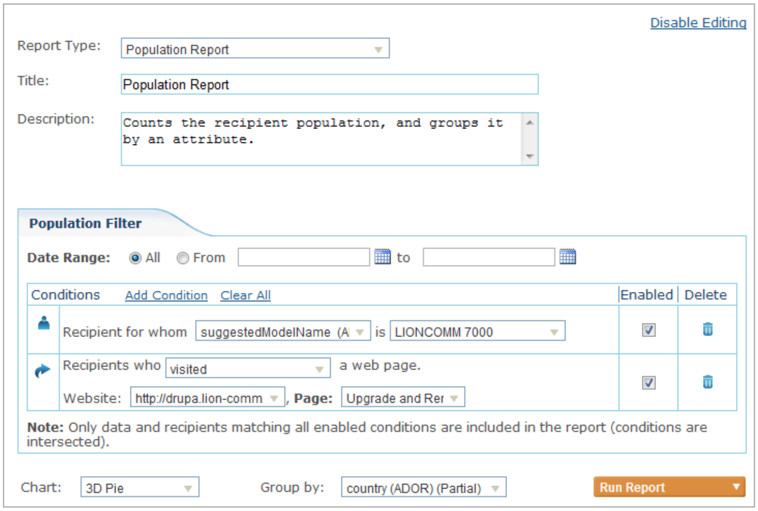
3. Determine whether this is an affirmation condition (the default option) or a negation condition. For example: for the **Website Visit** event, choose between **visited** and **didn't visit**.

4. Select the *URL* in question from the **Website** drop-down list.
5. For the **Action**, **Page Visit** and **Outbound Link Clicked** Web Events:
   Select the relevant web page from the **Page** drop-down list.
6. For the **Action** and **Outbound Link Clicked** Web Events:
   Select the operation you are interested in from the **Action** drop-down list.
7. Click **Finish** to close the **Condition Wizard**, and view the result in the **Conditions** pane of the **Population Filter.**

   Figure 76 below shows an example of a basic filter, which includes two conditions:

   - A Recipient Condition - recipients for whom the value of "**suggested Model Name**" is **"LIONCOMM 7000".**
   - A Web Event Condition – recipients who visited the "Upgrade and Renew" web page.
8. Click **Run Report.** The results shown in this example will be **grouped by** Country.

Figure 76: Basic Filter Example— Recipients with Specific Model Name, who Visited the Website



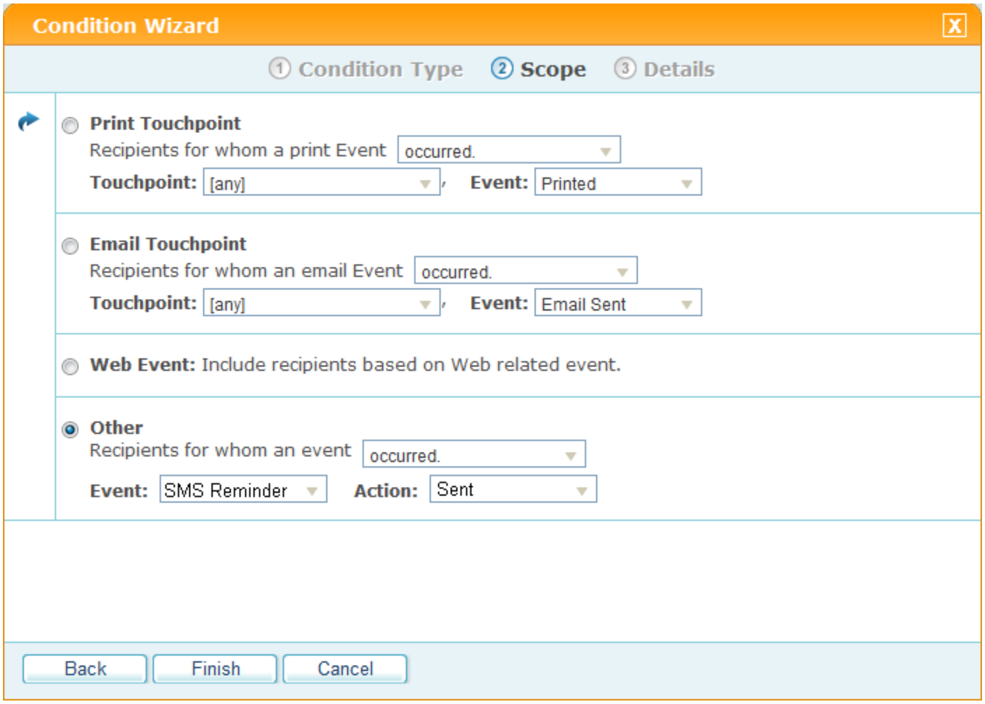
Advanced Population Conditions

Other Condition

To fully understand and analyze your Campaign, you may wish to include non-XMPie events in your reports. For example, you may wish to analyze phone calls or text (SMS) messages. If you use external systems to perform such events, you can add the event records to the Tracking database. You can then pinpoint these events by setting the condition **Scope** to **Other**.

Figure 77 below shows how to define a condition that pinpoints recipients to whom you have sent an SMS reminder to go to their RURL page.

Figure 77: Condition Wizard—Scope page: Other



Date Range Condition

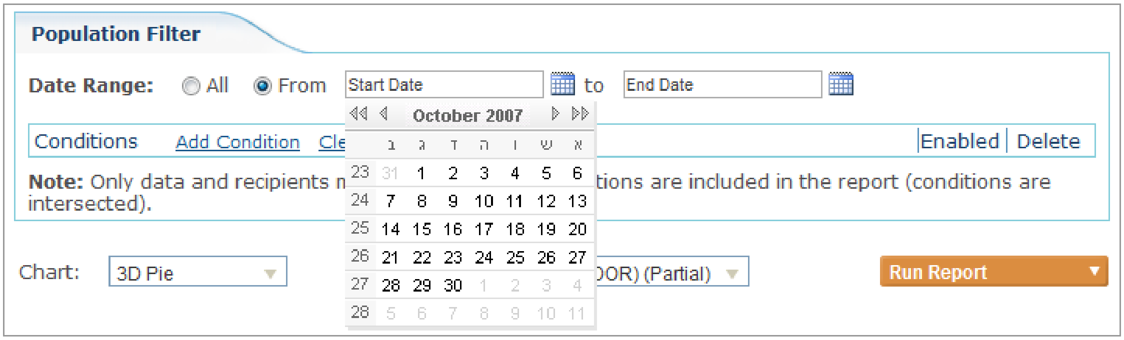
Each report Population Filter has an *Analysis Timeframe*: the date range for which the Campaign data is examined for the analysis. Filters can be set with a start date and no end date (the end date is automatically updated to "latest") or an end date with no start date (the start date is automatically updated to "earliest"). Events that occurred outside of this timeframe, and Attribute Values that existed only outside of this timeframe, are ignored in the analysis – they are not evaluated by the filter or by the report.

To understand the importance of the report's date range, consider the following example: suppose Jane changed her preferred phone color from red to blue on November 1st. If the date range is defined as August 1st —October 1st, then the effective color value for Jane would still be red; this means that if a Recipient-Attribute filter is used, with the color value set to "blue", Jane would NOT be included in the report results. If you run a report that groups recipients by their preferred phone color, Jane would be counted in the red color group.

Similarly, suppose George landed on the Upgrade website for the first time on November 5th. If the date range is defined as August 1st —October 1st, then George would not be included in a report counting the population visiting the website.

The default Analysis Timeframe is from the Campaign start (that is, starting of recording Campaign history) until "now". To limit the Analysis Timeframe to specific dates, you can set a **Date Range** Filter. This advanced filter selects only the population for which events had occurred within the specified date range. If you only select the start date, the end date is automatically updated to "latest". Vice versa, if you only select the end date, the start date is automatically updated to "earliest".

Figure 78: Report Definition—Population Date Range Filter



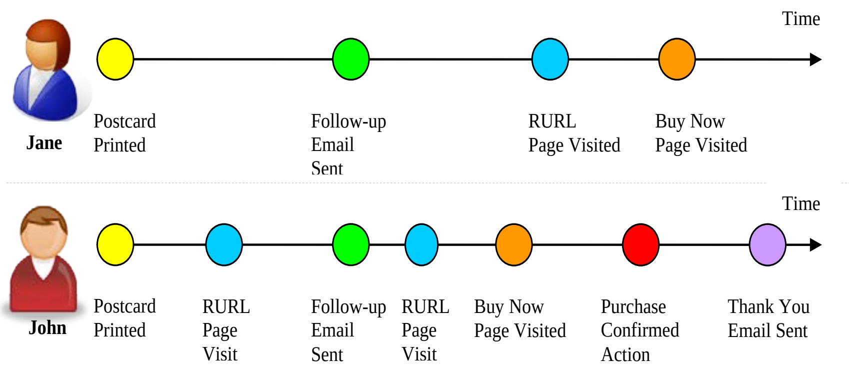
In certain cases, the **Date Range** Filter cannot answer your questions. For example, suppose you wish to filter the date range from the Campaign start to the time recipients had landed on the website. How would you set the "End Date" of such a date range, considering it is different for each individual (as each recipient landed on the website on a different date)? In fact, to perform this analysis, you do not need to define an "End Date", but an "End *Event*": the landing on the website. To configure an end event, use the Event Sequence Condition (page 97).

Event Sequence Condition

In certain cases, the focus of your analysis may be the order, or *sequence*, in which events have occurred. For example, you may wish to inquire how many recipients received an email *before* landing on the website, or find out how many recipients preferred a red phone *before* changing their preference to another color. These two questions relate to the sequence of events, because the question is regarding what had happened prior to an event, or what was the attribute's value prior to the event. The flow of Campaign events over time per-individual of the Population is known as an **Event Sequence**.

For each individual, a different event sequence may unfold over time. The sequence of events unfolds as the system or the user create additional events. A typical event sequence (which matches the basic usage example described on page 38) would be as follows: postcard-printed → email-sent → email-delivered → page-visited → another page-visited → button-clicked (Figure 79).

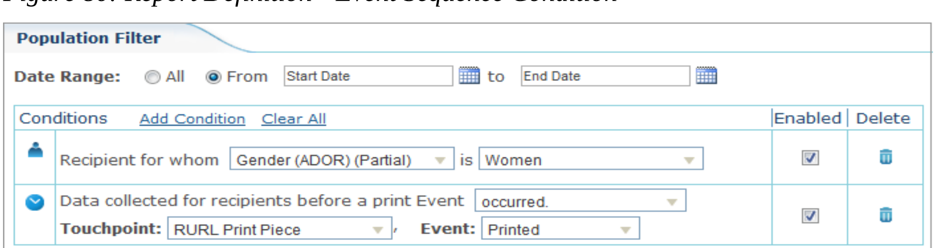
Figure 79: Event Sequence Example



The sequence of events may consist of outbound and inbound events. The outbound events are typically initiated by the XMPie user (for example, print, email); the inbound events reflect external activities (for example, page-visited, email-failed, response-sms sent). The event sequence (per individual in the population) is a single dimensional flow of events in the time dimension.

The Event Sequence is used in the **Event-Sequence Condition**: a filter criterion that limits the *Analysis Timeframe* separately for each individual in the population. The timeframe is defined as the time *before* a boundary event, which is specified in the condition. The condition selects only the population for which events have occurred before the specified boundary event (Figure 80).

Figure 80: Report Definition—Event Sequence Condition



The Event Sequence Condition allows you to do one of the following:

- *Select individuals who have their sequence of events ordered in a specific way*—for example: choose only individuals who received a follow-up email before they visited the webpage. If multiple event types match the condition, the earliest is used. In the example shown in Figure 79, John has two RURL page visits, and the filter is applied to the first RURL page visit. In this case, Jane would be selected, while John would not be selected.
- *Analyze Recipient-Attribute values in a certain phase*—for example, to analyze the recipient preferred-offer in the phase prior to the page visit (because the user might have modified his preference in the page visit). In the same example, John might have changed his preferred-offer *after* the follow-up email. To check the value *before* he received the follow-up email, use the event-sequence condition.

The Event Sequence Condition and the Date Range Filter both define how to narrow the Analysis Timeframe. The difference is that the Date Range Filter sets the *same* start and end dates for all recipients; while the Event Sequence Condition defines the range for each recipient *individually*, from the Campaign start to the event defined in the filter.

Note that just like the Date Range Filter, the Analysis Timeframe affects the behavior of the Recipient-Attribute and Event Conditions:

- The Recipient-Attribute Condition selects only individuals who have the specified value at the *end* of the Analysis Timeframe. For example, if the Analysis Timeframe ends when the user landed on a website, then the recipient is selected only if the specified attribute (for example, color) is equal to the specified attribute value (for example, red).
- The Event Condition selects only individuals for whom the event occurred *within* the Analysis Timeframe. For example, if the Analysis Timeframe ends when the user landed on a website, and the Event Condition specifies a follow-up email event, then the user is selected only if this follow-up email event has occurred before the user landed on the website.

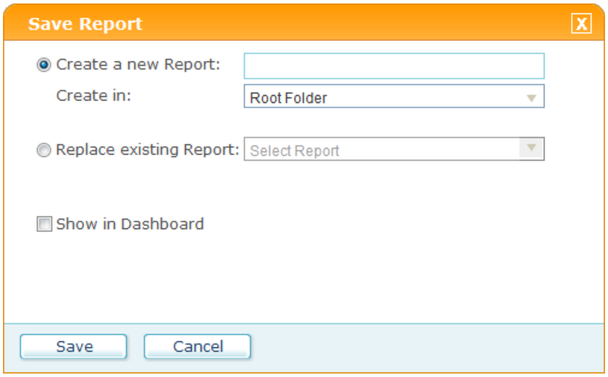
Saving a Custom Report

1. At the bottom of the report definition, click **Save**.

   The **Save Report** window is displayed (Figure 81).

2. Select the **Create a new Report** radio button if you wish to add a new Custom Report. In the text box next to it, enter an informative Report Name (see page 52). This name will be added to the **Custom Reports** tree.

Figure 81: Save Reports window



3. In the **Create in** drop-down list, select a report folder in the Custom Reports tree where you wish to save your report. By default, the "Root Folder" is selected.
4. If you wish to override an existing report, select the **Replace existing report** radio button (instead of **Create a new Report** radio button). In the drop-down list, select an existing report you wish to replace.
5. Check the **Show in Dashboard** checkbox if you wish to display your report in the Dashboard (see Adding a Report to the Dashboard on page 47).
6. Click **OK**.

   The new Custom Report is added to the **Custom Reports** tree.
   By selecting it from the tree, the report reloads itself.
   When it is selected, a **Delete** link is displayed next to the custom report. Clicking it deletes the Custom Report.

Managing the Report Tree

Any Marketing Console user can manage the hierarchy of the **Custom Reports** Tree by organizing the Custom Reports in folders. These settings affect all users of the Campaign.

In addition, users with administrator permissions can manage the hierarchy of the **General Reports** Tree.

Users are allowed to manage folders and reports in the following manner:

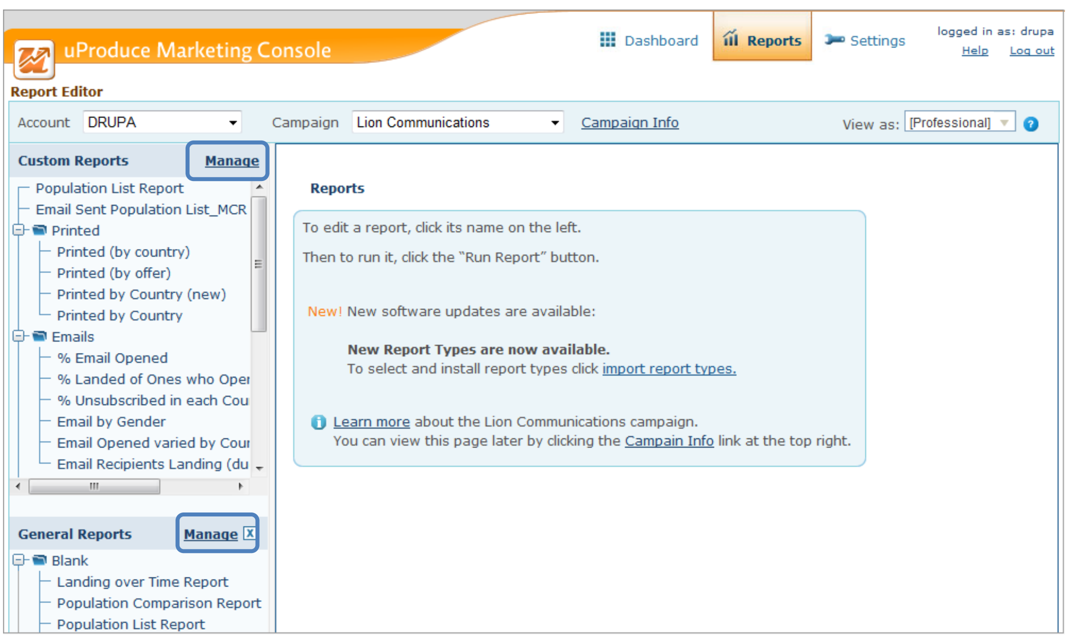
- Create a new folder
- Rename a folder or a report
- Delete folders or reports

- Move folders or reports
- Sort folders or reports.
- Select all folders
- Select multiple folders
- Unselect folders
- Import reports (see Importing Reports on page 104)
- Restore to default (see Restoring General Reports Defaults on page 108)

To manage the Report Tree:

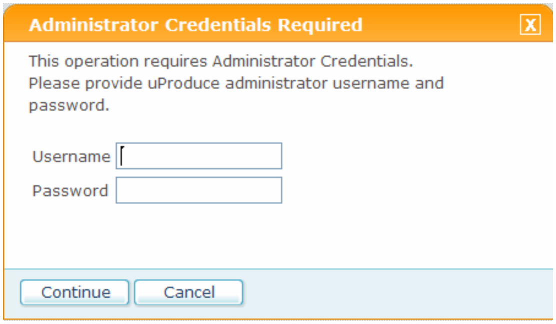
1. In the **Custom Reports** tree or the **General Reports** tree section, click the **Manage** link (see Figure 82).

Figure 82: Report Manager – Manage Link



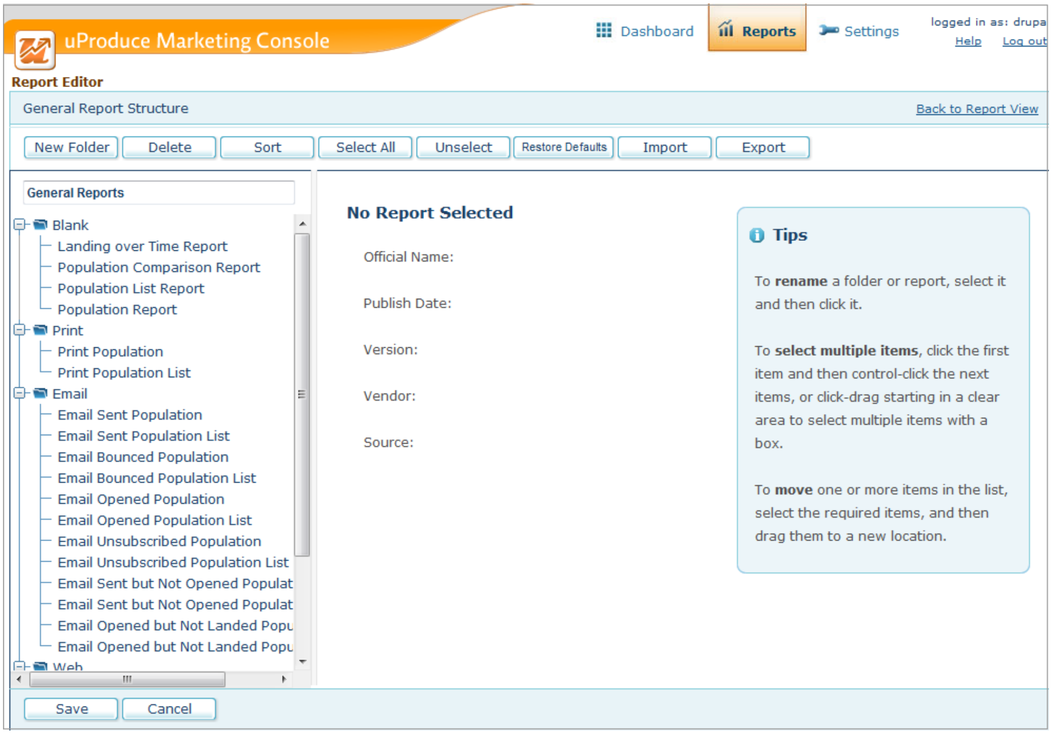
2. If in the previous step, you clicked the **Manage** link in the **General Reports** tree, the **Administrator Credentials Required** dialog is displayed where you should enter the uProduce administrator user name and password. Click **Continue**. This step is not required when editing the **Custom Report Tree**.

Figure 83: Administrator Credentials page



3. The **Custom Report Manager / Generic Report Manager** page is displayed.

Figure 84: Report Manager

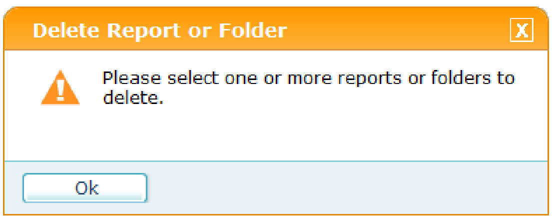


The **Report Manager** page displays the **Report Structure** and the links to the operations that can be performed on the Reports tree.

4. The following operations are allowed:

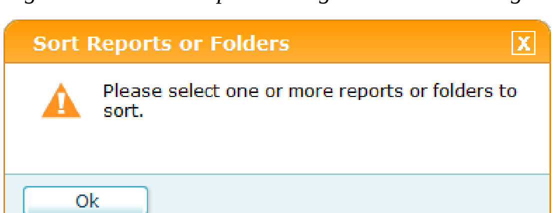
- **New Folder**: creates a sibling folder to the currently selected node (just below it).
- **Delete**: deletes a folder or a report. Clicking **Delete** when no folder/report is selected brings up a warning message.

Figure 85: Delete Folder or Report - Warning Message



- **Sort**: sorts the folders/reports in the ascending order (A-Z). The sorting option functions as follows:
    - Clicking **Sort** when no folder/report is selected brings up a warning message.
    - If one report node is selected, clicking **Sort** sorts all nodes in all levels including all subfolders and reports.
    - If one folder node is selected, clicking **Sort** sorts all nodes (reports and folders) within the selected folder.
    - If more than one node is selected, clicking **Sort** sorts only the selected nodes by switching their positions in the tree. The selected nodes must be on the same level. If a selected node is a folder, all the folders and reports within this folder are also sorted.

    Figure 86: Custom Report Manager – Sort – Warning Message

- **Select All**: selects all the tree nodes at the top level.
- **Unselect:** cancels the selection of a tree node.

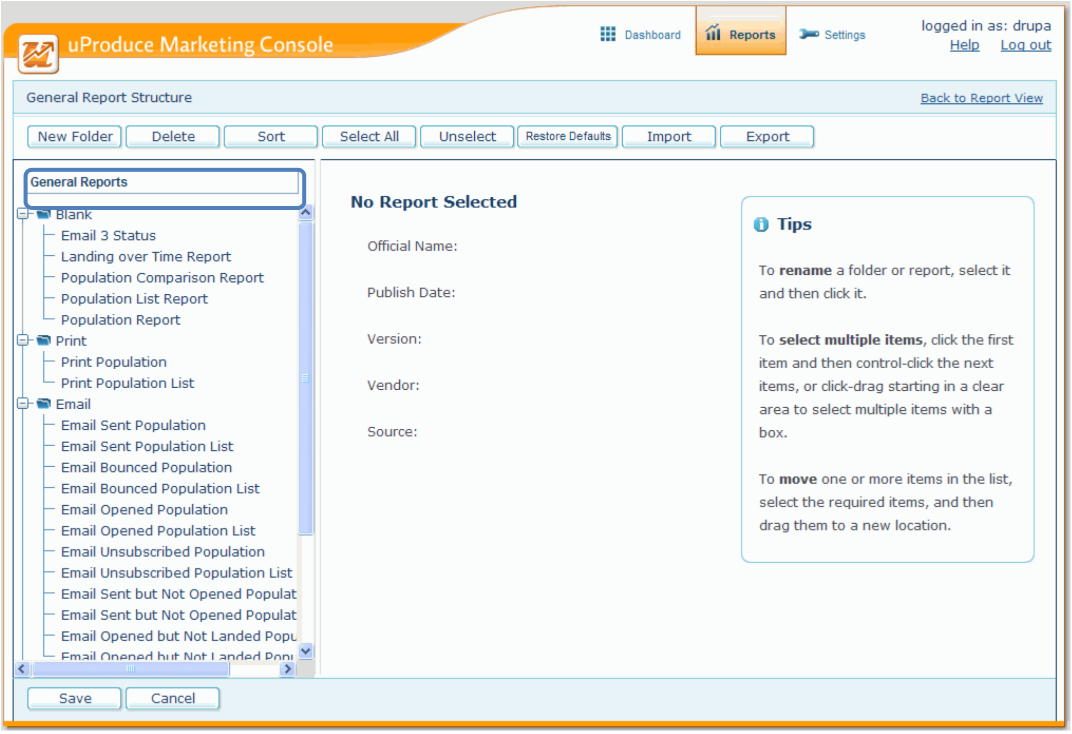
In addition, the users can:

- **Rename folders/reports**: to rename an item elect it and then click it.
- **Move folders/reports**: to move one or more items in the tree, select them and then move them to the required location
- **Select multiple folders/reports**: select the first item and then control-select the next items or click-drag starting in a clear area to select multiple items with a box.

  The last three operations are explained to the user in the Tips area in the right pane of the **Report Manager** page.

5. The default text "Custom Reports" or "General Reports" can be edited. The modified text will appear as a title of the **Custom Reports** or **General Reports** section respectively in the **Reports** page:

Figure 87: Custom Report Manager – Tree Manager



Importing Reports

Importing reports can be done either from the **Update Center** or from the **Report Manager**.

To import a report from the Update Center:

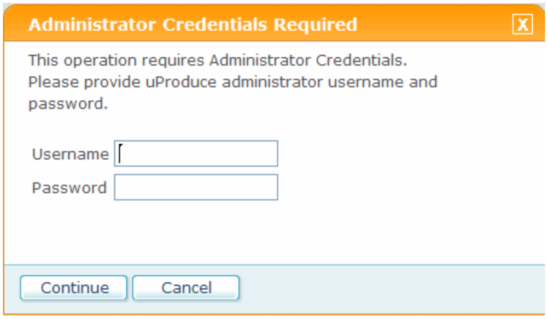
1. After login, and if a new update was published on the XMPie Update Center, you should see an indication in the Marketing Console homepage. Click on the link to see the list of available updates.
2. Select a report type to install. The Import Report Wizard is displayed (Figure 89 on page 106). To import the reports, follow the Import Report Wizard (see page 106).
3. The report is installed to the default location specified by the report creator.

***Note:** You can optionally relocate the installed report in the Report Tree by selecting a report folder to which you wish to import the report prior to performing the import.*

To import a report from the Report Manager:

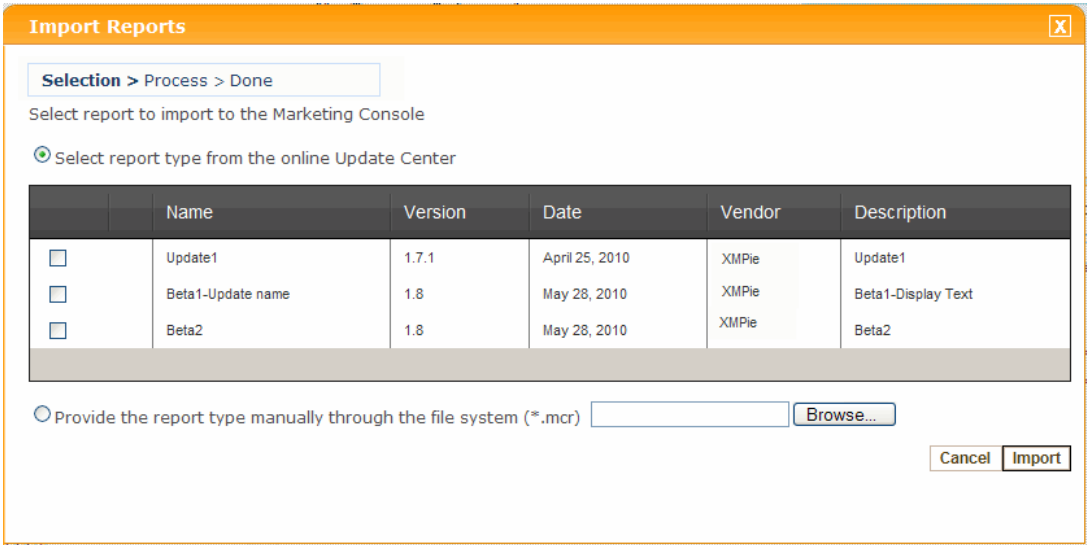
1. Click the **Manage** link in either in the **General Reports** tree or the **Custom Reports** Tree. If you wish to import a report to the **General Reports** tree, the **Administrator Credentials** window is displayed.

   Figure 88: Administrator Credentials page



2. Enter the uProduce administrator username and password and click **Continue**. The **Report Manager** page is displayed (Figure 84 on page 102).
3. Click the **Import** link. The **Selection** step of the **Import Report** Wizard is displayed.

Figure 89: Import Report Wizard - Selection step



4. Select the reports to be imported to the Marketing Console in one of the following two ways:

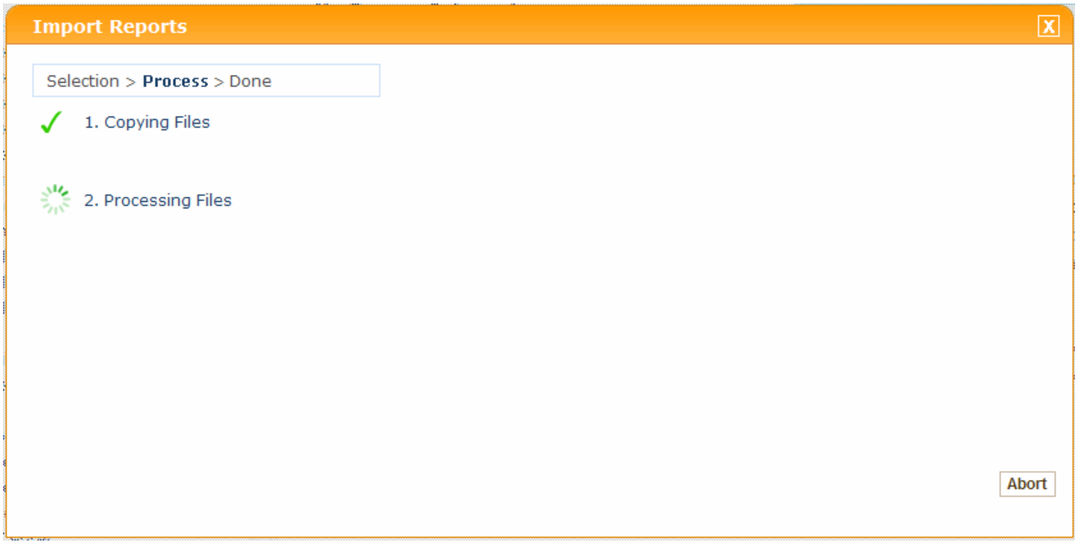
   - Check the **Select report type from the online Update Center** radio button and select reports from the list

   OR

   - If you have received a report file (a file with *.mcr extension), you can install it using this dialog. Select the **Provide the report type manually through the file system (*.mcr)** checkbox and click **Browse** to upload a report in *.mcr format.

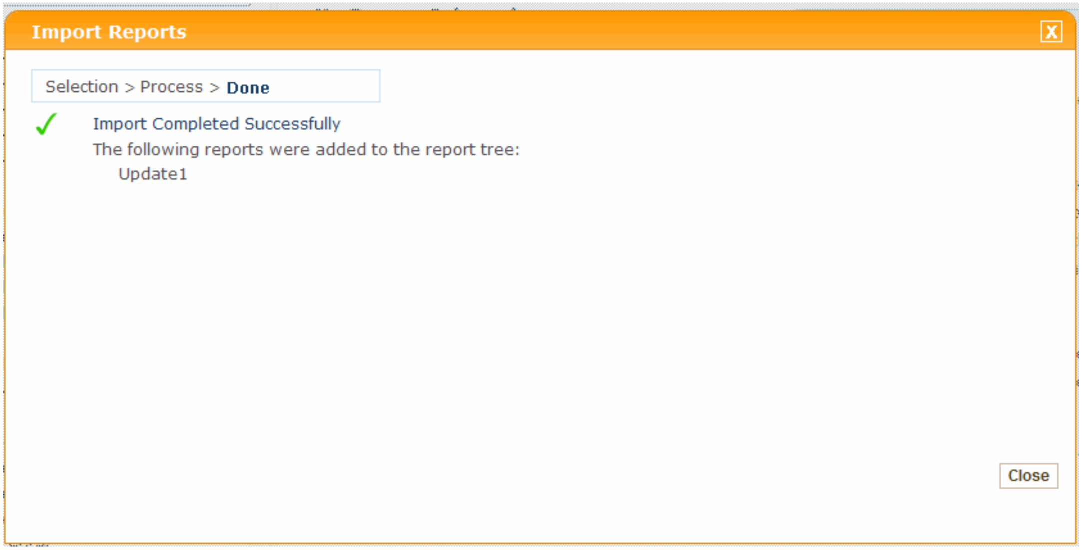
5. Click **Import**. The **Processing** step of the **Import Report** Wizard is displayed. Please wait while the report is being copied and processed. Clicking Abort returns to the **Selection** step of the **Import Report** page.

Figure 90: Import Report Wizard - Processing step



6. If the report has been successfully imported, the **Done** step of the Import Wizard is displayed listing the reports that have been added to your Report Tree.

Figure 91: Import Report Wizard - Done step



7. Click **Close** to return to the Report Manager. You will see the imported reports added to the tree.

The imported reports are fully functional as if they were native Marketing Console reports.

Restoring General Reports Defaults

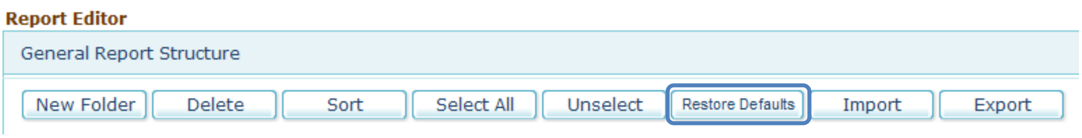
General Reports that have been modified or deleted can be restored to their defaults. This can be done by clicking the **Restore Defaults** link the General Reports Manager.

This option is not available for Custom Reports, as they have no default configuration.

To restore General Reports to defaults:

1. Click the **Manage** link in the **General Reports** tree. The **Administrator Credentials** window is displayed (Figure 83 on page 102).
2. Enter the uProduce administrator username and password and click **Continue**. The **Report Manager** page is displayed (Figure 84 on page 102).

   Figure 92: Restore Defaults

3. Click the **Restore to defaults** link. The Report tree structure and report defaults will be restored. The existing reports will not be deleted. If a whole folder is missing, it will be recreated.

Chapter 5: Managing Advanced Reports

This chapter describes the editing options of the following advanced reports:

- Population Comparison Report (see below)
- KPI Report (see KPI Reports on page 121)
- Unique Page Visit Report (Unique Page Visit Report on page 124)
- Email Performance Report (see Email Performance Report on page 126)
- Email Clicks Population Report (see Email Clicks Population Report on page 136)
- Email Clicks Population List Report (see Email Clicks Population List Report on page 138)
- Email Failure Population List Report (see Email Failure Population List Report on page 143)

Population Comparison Report

This report provides a way of looking at two Population Reports viewed side-by-side. You can compare any two populations, whether they are or are not of intersect. Each population is grouped by the same recipient-attribute.

The Population Comparison Report has two common uses:

- Finding out the Percentage of a Sub-Group out of the Reference Population
- Comparing Two Segments of the Population

In addition to Pie, Bar and Doughnut charts, the Population Comparison Report can be represented using the Gauge chart (see KPI Reports on page 121).

Finding out the Percentage of a Sub-Group out of the Reference Population

The Population Comparison Report is useful when you need to find out the *percentage* of people (population A) who meet a certain condition out of the reference population (population B).

For example, the Lion Communications Campaign began with an initial postcard, asking recipients to visit their RURL Landing Page. At the next phase, postcard recipients who haven't visited their RURL Landing Page were sent a follow-up email. When analyzing the Campaign results, you may wish to find out if this email reminder was effective, that is:

What percentage of the RURL Landing Page visits was generated by the follow-up email compared with the general population visits?

The Population Comparison Report answers this question by defining two Population Filters:

- The filter of **population B**, the *reference population*, is the general population, which has a single condition:

  Recipients who visited their RURL Landing Page

- The filter of **population A**, the *percentage* you're interested in, has two conditions:
  - Recipients who visited their RURL Landing Page

    AND

  - Recipients who were sent a follow up email

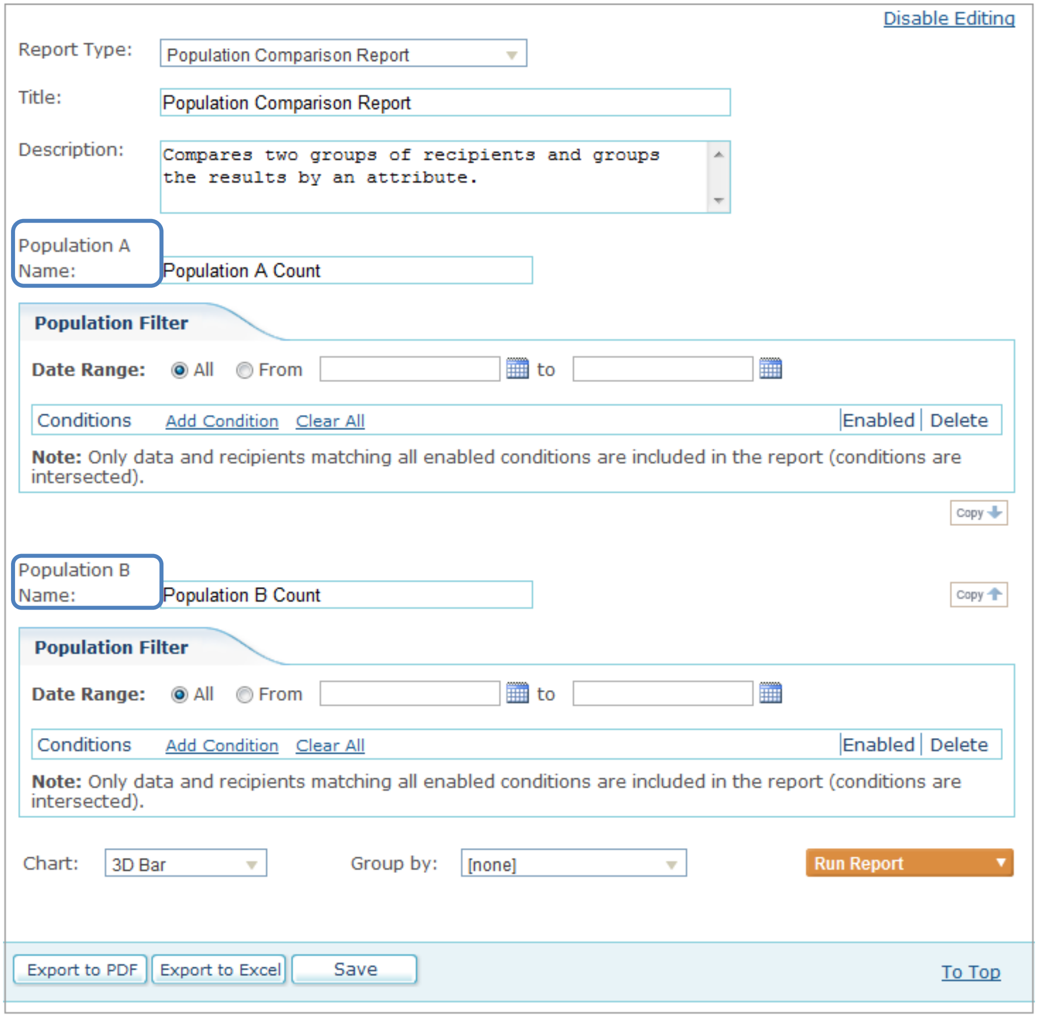
The following procedure explains how to define this Population Comparison Report.

Note: *To run the report without a reference population, use the Population Report (see* *Population Report on page 63**).*

To generate a Population Comparison Report (calculating the percentage of population A out of population B):

This procedure explains how to configure the report filters shown in Figure 93.

Figure 93: Population Comparison Report—the Percentage of Population A out of Population B



1. Edit the **Name** of the Population B.
2. Define the **Date Range** filter for Population B. You can either select **All** to display all the results in the report or narrow the Date Range by specifying the start and end time in the **From** and **to** fields, respectively. Click the Calendar icons to select the date. If you only

select the start date and leave the end date empty, the latter is automatically updated to "Latest". Vice a versa. If you only select the end date and leave the start date empty, the latter is automatically updated to "Earliest".

3. Define the **Population Filter** of **population B** (*bottom* section)—click **Add Condition** and use the **Condition Wizard** to setup the following condition.

Note: *Please note that this example is for illustration purpose only. The user can choose any number of conditions, of any type, not necessarily Event Conditions.*

   a. Set the **Condition Type** to **Event Condition**.

   b. Set the **Scope** to **Web Event**.

   c. Set the **Details** to a **Page Visit**, in which recipients have *visited* a **Website** named *http://drupa.lion-comm* and a **Page** named *Landing*.

   d. Click **Finish**.

4. Enter the **Name** of the Population A.

5. Define the **Date Range** filter. You can either select All to display all the results in the report or narrow the Date Range by specifying the start and end time in the **From** and **to** fields, respectively. Click the Calendar icons to select the date. If you only select the start date and leave the end date empty, the latter is automatically updated to "Latest". Vice a versa. If you only select the end date and leave the start date empty, the latter is automatically updated to "Earliest".

6. Reuse the **Population Filter** of **population B** (bottom section) to define the **Population Filter** of **population A** (top section), by clicking the **Copy** arrow pointing up (Copy).

7. Refine the **Population Filter** of **population A** (top section), by adding the follow-up email Touchpoint—click **Add Condition** and use the **Condition Wizard** to setup the following condition:

   a. Set the **Condition Type** to **Event Condition**.

   b. Set the **Scope** to an **Email Touchpoint**, where the email Event that *occurred* is a **Touchpoint** named *Follow-up Email* and the **Event** is *Email Sent*.

8. Set the **Group By** list to the Recipient-Attribute by which you wish to group the results, for example, *Gender*.

9. Click **Run Report**.

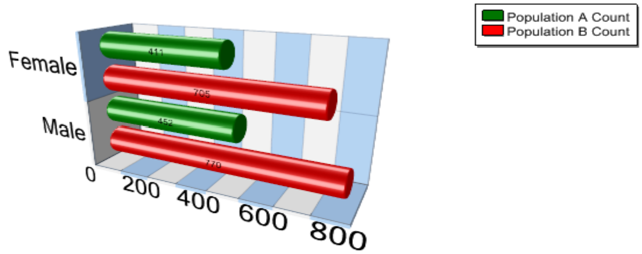
   The report results are displayed below the report definition (Figure 94).

   Figure 94: Population Comparison Report—Results, Grouped by Gender

Population Comparison Report

Valid Through: March 04, 2009 12:39

Compares two groups of recipients and groups the results by an attribute.



Population A Count: 863

Population B Count: 1475

Population A Count out of Population B Count: 58.51%

gender	Population A Count	Population B Count	Population A Count out of Population B Count [%]
Male	452	770	58.7
Female	411	705	58.3

The percentage of Landing Page visits generated by the follow-up email is 58.51%. The email was equally effective for males (58.7%) and for females (58.3%).
You can safely conclude that sending a RURL email in this particular Campaign has been quite effective, regardless of the recipient's gender.

Comparing Two Segments of the Population

The Population Comparison Report can help you understand how a specific segment correlates with another segment of the population. Various attributes of the population and or a Touchpoint (for example, attribute, Touchpoint (event) or event sequence) can be compared.

The following two sections provide useful examples of population comparisons:

- Comparison based on Gender
- Comparison based on Offering: Headset or Charger

Comparison based on Gender

The example Lion Communications phone upgrade Campaign offers customers a headset or a charger as a gift incentive, and asks them to log on to an upgrade website. When analyzing your Campaign results, you may wish to segment the population by *gender*, to find out if males and females have responded differently to this call for action, that is:

How do the "Male" and "Female" segments compare, in terms of visits to the web site?

The Population Comparison Report answers this question by defining two Population Filters, which share one condition (web site visit) and differ by another condition (gender):

- The filter of **population A** selects recipients who visited the web site and whose gender is "male".
- The filter of **population B** selects recipients who visited the web site (same as population A) and whose gender is "female".

We will group the results by the Offering: Headset or Charger.

The following procedure explains how to define this Population Comparison Report.

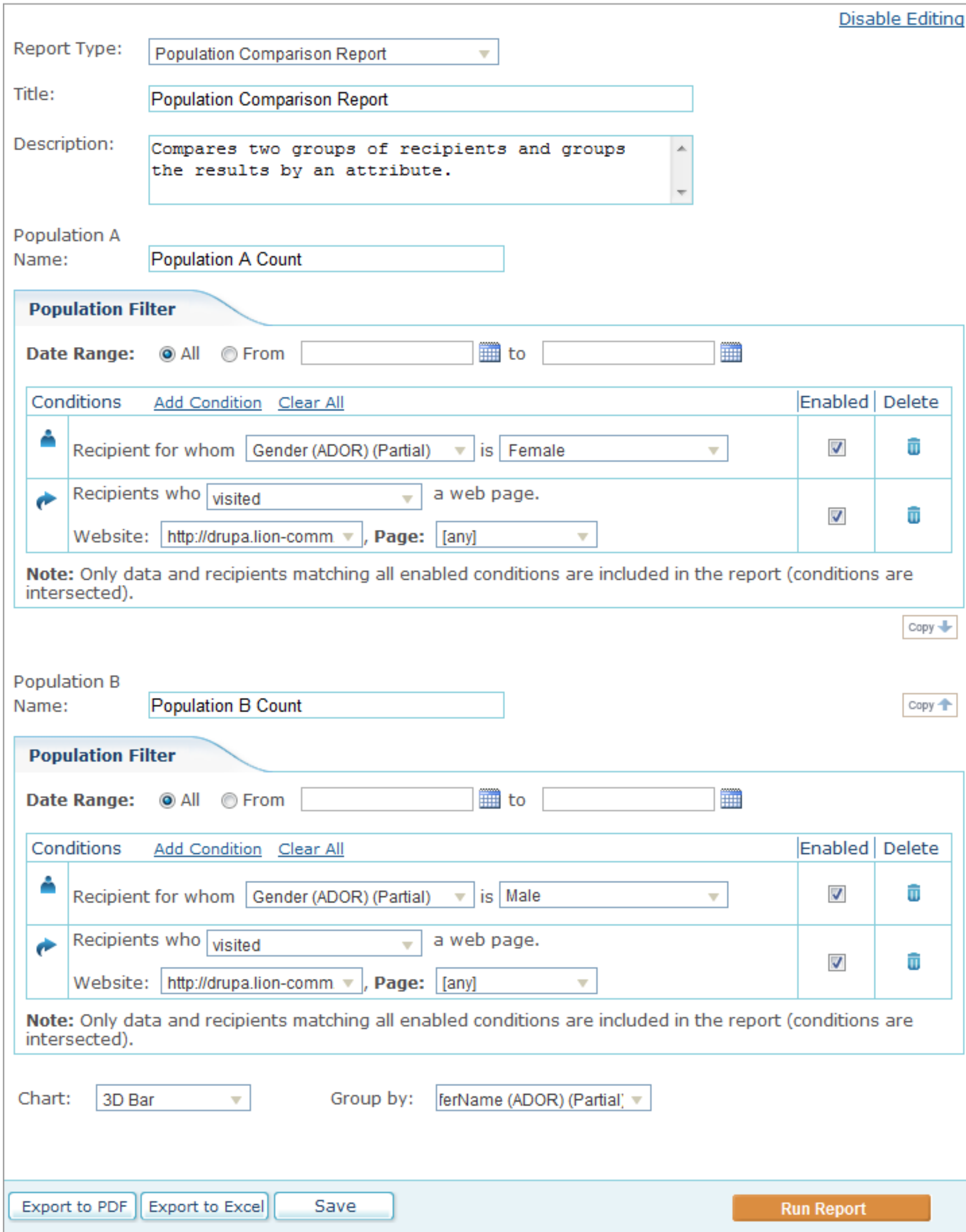
How to generate a Comparison Report (analyzing the relationship between population A and population B):

1. Define the first condition in the **Population Filter** of **population B** (bottom section)—click **Add Condition** and use the **Condition Wizard** to setup the following condition:
   a. Set the **Condition Type** to **Event Condition**.
   b. Set the **Scope** to **Web Event**.
   c. Set the Details to a Page Visit, in which recipients have visited a Website named *http://lion-comm.com*.
2. Define the second condition in the **Population Filter** of **population B** (bottom section)—click **Add Condition** and use the **Condition Wizard** to setup the following condition:
   a. Set the **Condition Type** to **Recipient Condition**.
   b. From the **Recipients for whom** drop-down list, choose **Gender (ADOR)**.
   c. From the **is** drop-down list, choose **Male**.
3. Reuse the **Population Filter** of **population B** (bottom section) to define the **Population Filter** of **population A** (top section), by clicking the **Copy** button with the arrow pointing up (

).
4. Modify the **Population Filter** of **population A** (top section), by editing the Recipient Condition and setting the **is** drop-down list to **Female**.
5. From the **Group By** drop-down list, choose the **offerName (ADOR)**.

   The Comparison Report Filters described above are shown in Figure 95.

Figure 95: Population Comparison Report—Males vs. Females who Visited the Web Site



6. Click **Run Report**.

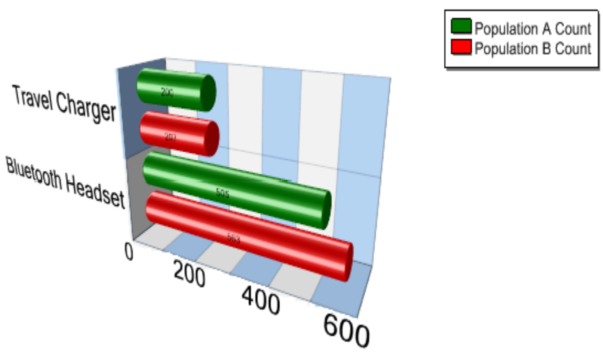
   The report results are displayed below the report definition (Figure 96).

   Figure 96: Population Comparison Report Results, Grouped by Offering

Population Comparison Report

Valid Through: March 04, 2009 12:54

Compares two groups of recipients and groups the results by an attribute.



Population A Count: 705

Population B Count: 770

Population A Count out of Population B Count: 91.56%

offerName	Population A Count	Population B Count	Population A Count out of Population B Count [%]
Bluetooth Headset	505	563	89.7
Travel Charger	200	207	96.62

***Note:** When you are comparing segments of the population, population A and population B are mutually exclusive, so the percentage of A out of B is irrelevant.*

Analysis

The report results show that males (**population B**) were slightly more responsive to the Campaign compared to females (**population A**): 770 males vs. 705 females have visited the upgrade web site.

While gender seems to have a slight impact, the offering in question has an indisputable impact: the majority of people who visited the web site did so after receiving the Bluetooth headset offer (505 females and 563 males).

You can now confidently refine you Campaign: offer all recipients the more popular incentive – a headset – regardless of their gender, and improve the Campaign performance.

Comparison based on Offering: Headset or Charger

In the following example, we will further analyze the results of the Lion Communications Campaign. We wish to identify whether the headset preference is true for all segments, or whether it varies across segments. We looked at the gender segments in the previous section. Now we will look for variations across the suggested phone model segments.

The Population Comparison Report answers this question by defining two Population Filters, which share one condition (clicking the “Upgrade” link) and differ by another condition (suggested phone model):

- The filter of **Population A** selects recipients who clicked the “Upgrade” link and selected the Bluetooth Headset.
- The filter of **Population B** selects recipients who clicked the “Upgrade” link (same as **Population A**) and selected the Charger.

We will group the results by the suggested phone model: LionCom 4000, 5000 and 7000.

The following procedure explains how to define this Population Comparison Report.

How to generate a Comparison Report (analyzing the relationship between population A and population B):

1. Define the first condition in the **Population Filter** of **population A** (top section)—click **Add Condition** and use the **Condition Wizard** to setup the following condition:
   a. Set the **Condition Type** to **Event Condition** and click **Next**.
   b. Set the **Scope** to **Web Event** and click **Next.**
   c. Set the **Details** to **Action**.
   d. From the **Recipients who** drop-down list, choose **performed**.
   e. From the **Website** drop down-list, choose **http://drupa.lion-comm.com**.
   f. From the **Page** drop-down list, choose **Landing**.
   g. From the **Action** drop-down list, choose **Upgrade Clicked**.
   h. Click **Finish**.

2. Define the second condition in the **Population Filter** of **population A** (top section)—click **Add Condition** and use the **Condition Wizard** to setup the following condition:

   a. Set the **Condition Type** to **Recipient Condition** and click **Next**.

   b. From the **Recipients for whom** drop-down list, choose **offerName (ADOR)**.

   c. From the **is** drop-down list, choose **Bluetooth Headset**.

   d. Click **Finish**.

4. Reuse the **Population Filter** of **population A** (top section) to define the **Population Filter** of **population B** (bottom section), by clicking the **Copy Filter** arrow pointing down (Copy filter ▼)).

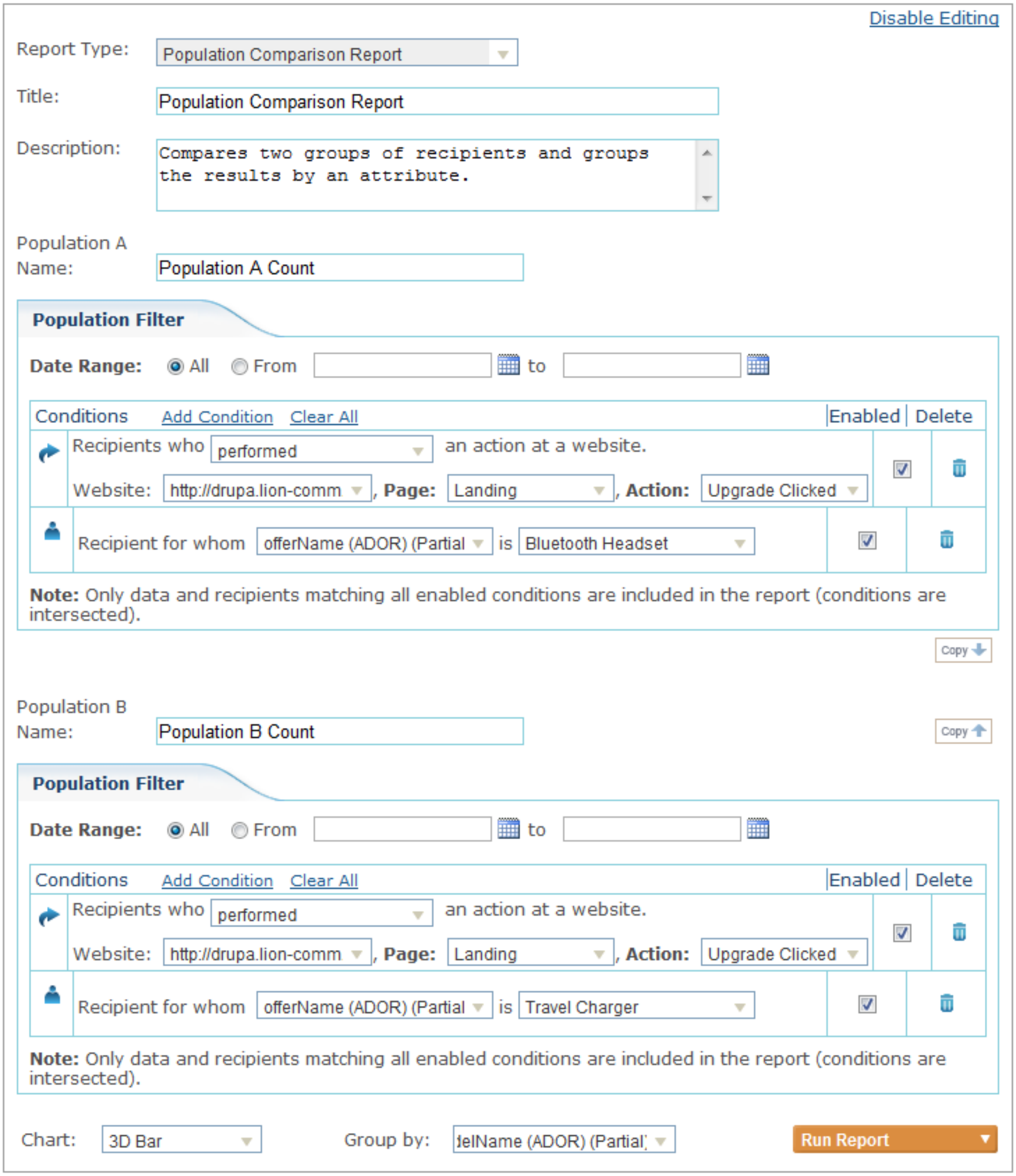
5. Modify the **Population Filter** of **population B** (bottom section), by editing the Recipient Condition and setting the **is** drop-down list to **Travel Charger**.

6. From the **Group By** drop-down list, choose the **suggestedModelName (ADOR)**.

7. Click **Run Report**.

   Figure 97 displays the Comparison Report Filters described above.

Figure 97: Population Comparison Report—Headset vs. Charger with condition: Phone Model



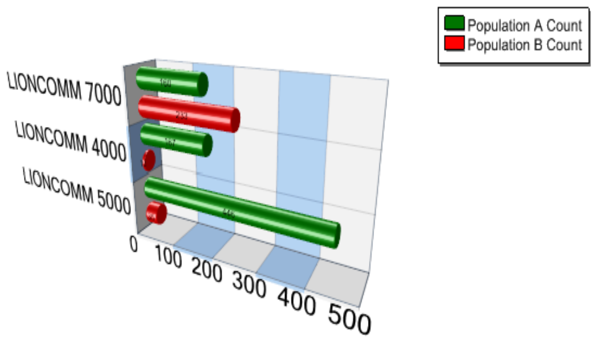
After we ran the report, the report results are displayed in the 3D bar chart below (Figure 98)

Figure 98: Population Comparison Report Results, Grouped by Phone Model

Population Comparison Report

Valid Through: March 04, 2009 17:30

Compares two groups of recipients and groups the results by an attribute.



Population A Count: 773

Population B Count: 278

Population A Count out of Population B Count: 278.06%

suggestedModelName	Population A Count	Population B Count	Population A Count out of Population B Count [%]
LIONCOMM 5000	446	35	1274.29
LIONCOMM 4000	167	10	1670
LIONCOMM 7000	160	233	68.67

Analysis

The analysis of this Population Comparison Report Results clearly shows a direct correlation between the suggested phone model and the preferred offering:

- The LIONCOMM 4000 and the LIONCOMM 5000 customers overwhelmingly preferred the *Bluetooth Headset* (shown in green).

  The LIONCOMM 7000 customers preferred the *Travel Charger* (shown in red).

You can implement these analysis observations in the next phase of your Campaign and significantly increase the ROI. The first phase was the pilot of: A to B testing. The next phase was going large scale, using the pilot result to refine the Campaign. The large-scale Phone Upgrade Campaign will most effectively address the customers' preferences, by offering LIONCOMM 4000 and LIONCOMM 5000 customers a Headset, and offering LIONCOMM 7000 users a Charger. This design will yield a significantly better ROI.

KPI Reports

Marketing Console lets you monitor Key Performance Indicators (KPIs) and thus evaluate the results of your campaign against a set target. KPIs are quantifiable metrics that reflect whether you are successfully meeting your business goals.

Marketing Console offers you the following pre-defined KPI reports (based on the Population Comparison Report):

- **Print Response Rate (KPI)**: shows percentage of recipients who visited a website out of those who received a print piece. You will need to select the website in the report conditions; otherwise you will get an aggregation of all websites.
- **Email Open Rate (KPI)**: shows percentage of recipients who opened an email out of those who received an email. You will need to select the email Touchpoint in the report conditions; otherwise you will get an aggregation of all Touchpoints.
- **Web Conversion Rate (KPI)**: shows percentage of recipients who performed an action out of those who visited a website. You will need to select the website and the action in the report conditions; otherwise you will get an aggregation of all websites and any action.

These reports have predefined performance ranges.

Generating KPI Reports

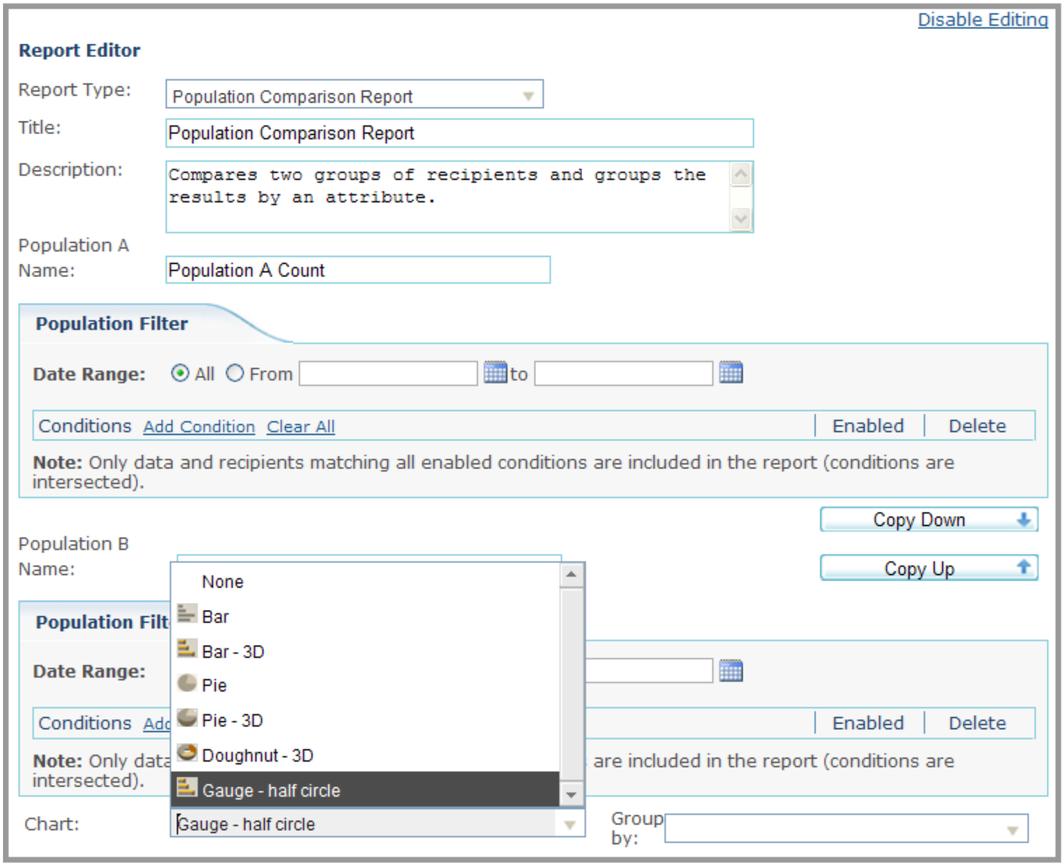
To generate a KPI report:

1. Edit the report parameters (**Title, Description, Population Name, Date Rage, Population filter**) as described in Population Comparison Report on page 109.
2. If you wish to narrow the results, in the **Population filter** section define a condition.

__Note__: In the pre-defined KPI reports, remember to replace the "any" value with a specific Touchpoint (for Email Open Rate Report) or Action (for Web Conversion Rate Report).

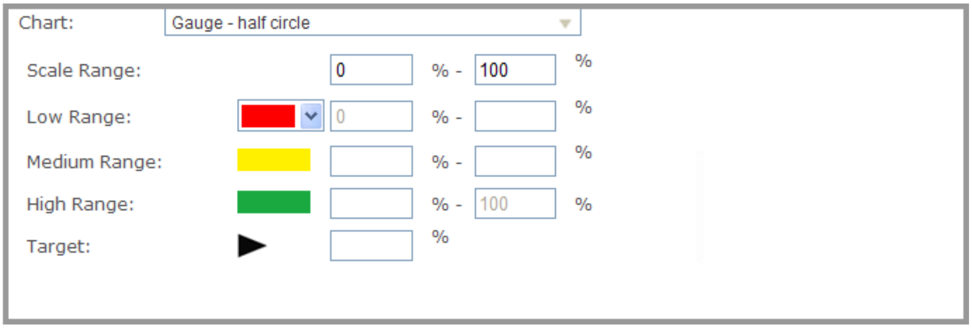
3. In the **Chart** drop-down list, select the **Gauge – half circle** option.

Figure 99: Chart Drop-Down List – Gauge-half circle option



When the **Gauge – half circle** option is selected, the Group **by** field disappears and the Gauge fields are shown:

Figure 100: Gauge Chart Definition

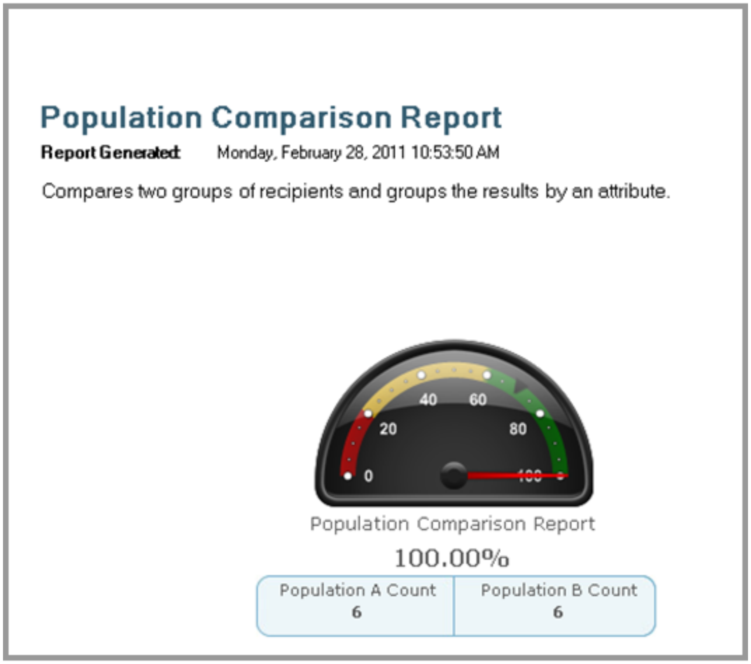


4. In the **Scale Range** field, enter the scale minimum and maximum values (as a percentage) (mandatory). The default values are 0 and 50%, however, you may choose any other range.
5. (Optional) If you wish to mark the performance ranges, fill in the **Low Range**, **Medium Range** and **High Range** values and select the color for the Low Range (other colors are filled in automatically).
   - **Range values**
     - **Low Range**: The minimum value is automatically filled and is equal to the Scale Range minimum value. Specify the maximum value.
     - **Medium Range**: The minimum value is automatically filled and corresponds to the maximum value of the Low Range. Specify the maximum value.
     - **High Range:** The minimum and maximum values are automatically filled. The minim value equals the maximum value of the Medium Range and the maximum value corresponds to the maximum value of the Scale Range.
   - **Colors**

     The red color indicates undesirable performance, the yellow color specifies the Medium Range and the green color marks desirable performance.
     - By default, the **Low Range** is marked by the red color (undesirable performance) since most gauges measure desirable events (for example, website visits), where the higher number indicates a better performance. In this case, the green color will be automatically selected for the **High Range**.
     - If you wish to measure undesirable events (for example, Unsubscribe event for Email), you can mark the **Low Range** by the green color (desirable performance). The **High Range** will be then marked as red.
6. (Optional) You can mark your performance target on the gauge by entering a value in the **Target** field.
7. Click **Run Report**.

   The report results are displayed below the report definition (Figure 101).

Figure 101: Population Comparaison Report Gauge—Results



If the minimum value is higher than zero and the result is below the minimum value, then the pointer points just below the minimum value. If the result is higher than the maximum value, the pointer will point just beyond the maximum value. For example, if you have sent a very large email blast for which you expect 5-10% response rate, you can define the scale as 0-15% (it does not have to be 0-100%). In this case, if more than 15% is reached, the pointer will point past the highest number of the scale.

Unique Page Visit Report

This report provides a view of the popularity of the page visits among the filtered population, within the analysis timeframe. For each page, the report shows the number of times it was visited. Each population individual is counted only once, even if they visited the same page multiple times.

For example, you can use this report to identify the page on which the largest number of surfers leave your site, and focus your efforts on making that page more alluring.

To generate a Unique Page Visit Report:

- To generate a report for all pages on your web site, simply click **Run Report**.

- To narrow down the report to specific pages:
    - Define the **Date Range** filter.
    - Click **Add Condition** and use the **Condition Wizard** to setup the following condition. For example, you may wish to set a Recipient Condition, to find out which page was most popular among women.

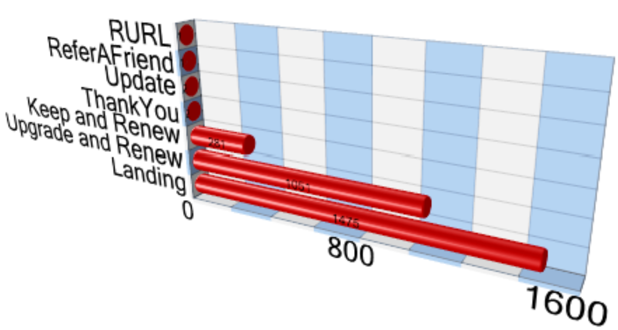
Example report results are shown in Figure 102.

Figure 102: Unique Page Visit Report—Results

Unique Page Visit Report

Valid Through: March 04, 2009 14:11

Counts the unique recipients who visited a web page.



Population Size: 2813

Page Name	Unique Visits	% of Population
Landing	1475	52.44
Upgrade and Renew	1051	37.36
Keep and Renew	281	9.99
ThankYou	2	0.07
Update	2	0.07
ReferAFriend	1	0.04
RURL	1	0.04

Email Performance Report

In addition to separate email status reports, such as Email Opened or Email Unsubscribed, you can now run the Email Performance report that displays all statuses of a single Email Touchpoint as well as its relevant key performance rates. Key performance rates include Response rate, Open rate, Delivery rate, Not Open and Unsubscribe rates.

The report counts recipients (not events). Each recipient is counted once regardless of how many times he/she opened the email or clicked a link in the email. Understanding this point is very important when you consider a recipient who performed more than one action. For example:

- **Action**: Recipient A opened the email. **Report**: A is included in the "Opened (only)" count.

- **Action**: Recipient B opened the email and unsubscribed. **Report**: B is included in the "Unsubscribed" count and excluded from the "Opened (only)" count.

- **Action**: Recipient C opened the email, unsubscribed and clicked the link to visit the website (order is not important). **Report**: C is included in the Response rate (i.e., Visited the website) and excluded from “Opened (only)" count and "Unsubscribed" count.

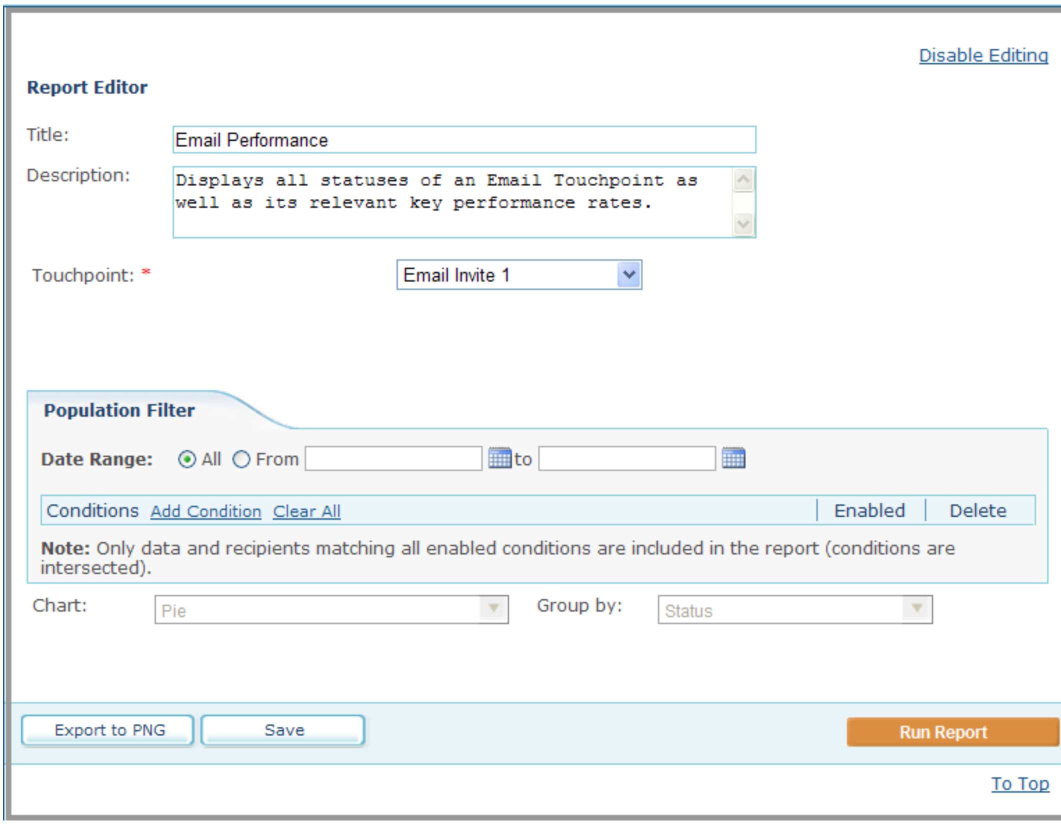
Generating Email Performance Report

To generate an Email Performance Report:

1. In the Reports tree, select **General Reports** > **Blank** > **Email Performance**.

   The **Report Editor** page displayed (Figure 103 on page 127):

Figure 103: Email Performance Report



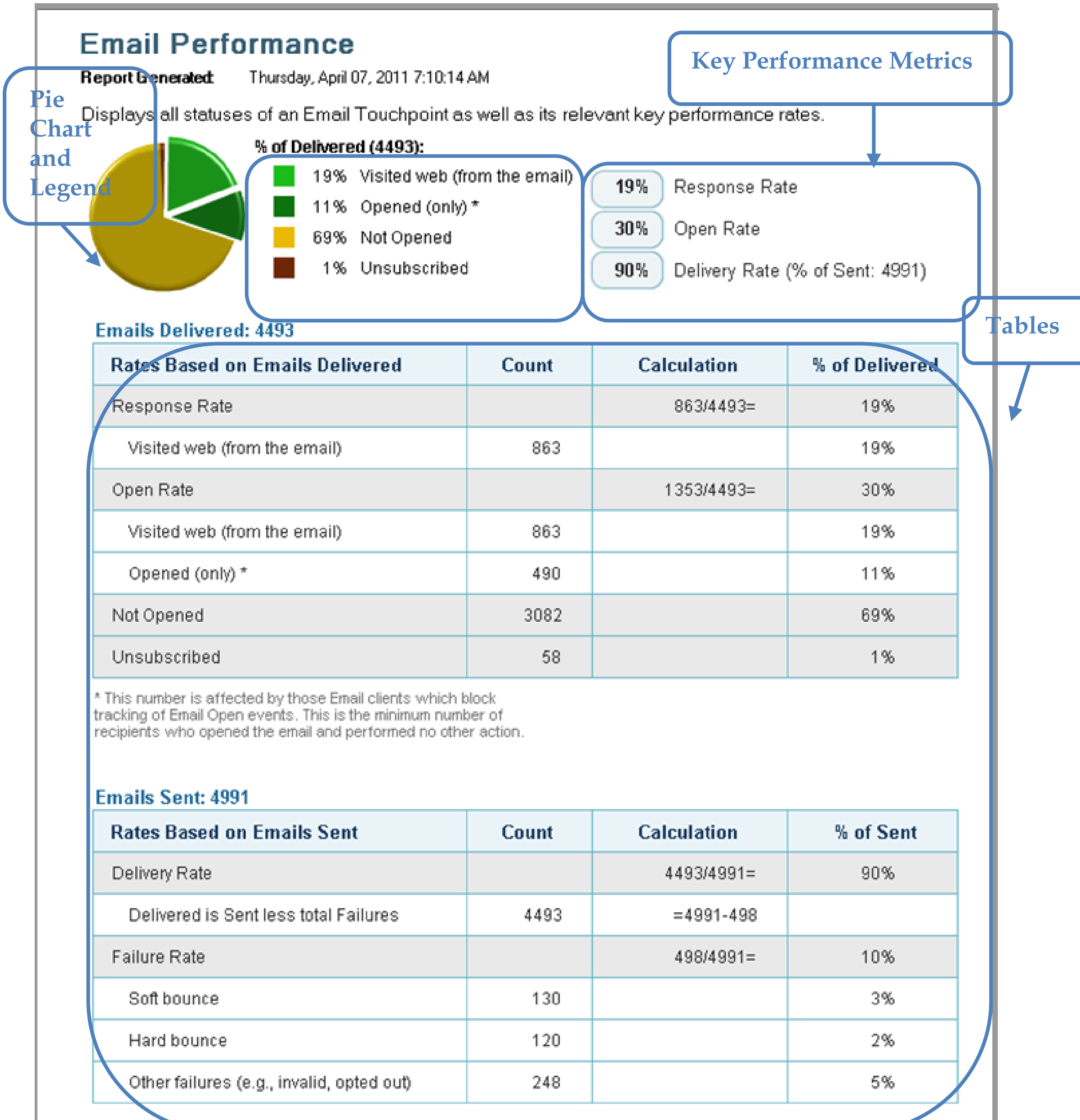
2. In the **Touchpoint** drop-down list, select the Touchpoint for which you would like to run the report.
3. To narrow down the report to specific results:
   a. Define the **Date Range** filter.
   b. Click **Add Condition**. The **Condition Wizard** is displayed. Define your conditions as described in Population Filter on page 87.

***Note:** The **Chart** and **Group by** fields are read-only for this report.*

4. Click **Run Report** to generate a report.

   The report output is displayed (Figure 104).

Figure 104: Email Performance Report Results



Email Performance

Report Generated: Thursday, April 07, 2011 7:10:14 AM

Displays all statuses of an Email Touchpoint as well as its relevant key performance rates.

% of Delivered (4493):

- 19% Visited web (from the email)
- 11% Opened (only) *
- 69% Not Opened
- 1% Unsubscribed

- 19% Response Rate
- 30% Open Rate
- 90% Delivery Rate (% of Sent: 4991)

Emails Delivered: 4493

Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%
Not Opened	3082		69%
Unsubscribed	58		1%

* This number is affected by those Email clients which block tracking of Email Open events. This is the minimum number of recipients who opened the email and performed no other action.

Emails Sent: 4991

Rates Based on Emails Sent	Count	Calculation	% of Sent
Delivery Rate		4493/4991=	90%
Delivered is Sent less total Failures	4493	=4991-498	
Failure Rate		498/4991=	10%
Soft bounce	130		3%
Hard bounce	120		2%
Other failures (e.g., invalid, opted out)	248		5%

The Email Performance report results are represented in the following report areas:

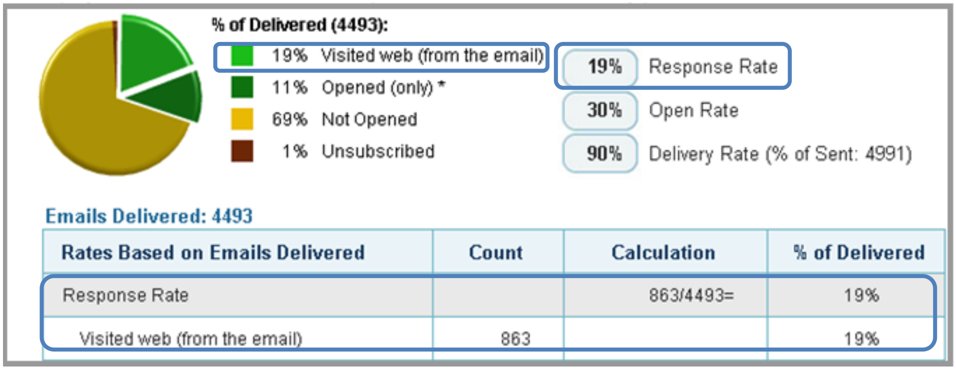
- Exploded pie chart accompanied by a legend
- **Emails Delivered** and **Emails Sent** tables
  - The **Emails Delivered** table shows rates based on the number of delivered emails
  - The **Emails Sent** table shows rates based on the number of sent emails
- Key Performance Metrics summary

The Email Status report can be exported to the PNG file (see Exporting Report Results on page 42).

Analyzing Email Performance Report Results

Response Rate

Figure 105: Email Performance Report Results – Response Rate



The **Response Rate** measures how many recipients, among those who received the email, clicked the link to get to the website.

In order enable Response Rate tracking in the Marketing Console:

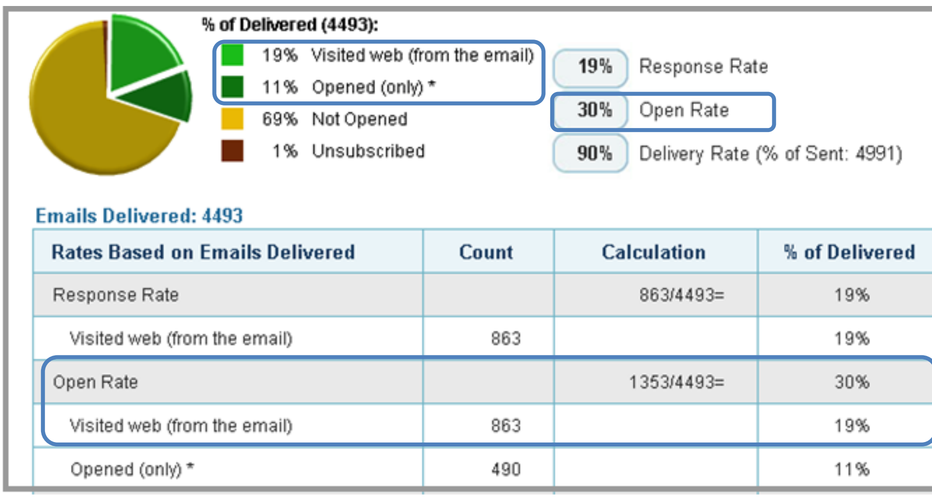
a. The link leading to the RURL website must be represented by the *XMPieRURL* ADOR Object.

b. Use the Touchpoint name in the Email blast.

The **Response Rate** corresponds to the **Visited Web (from the email)** in the pie, the legend and the table (as indicted in the image). The **Response R**ate is calculated based on the total amount of **delivered** emails.

Open Rate

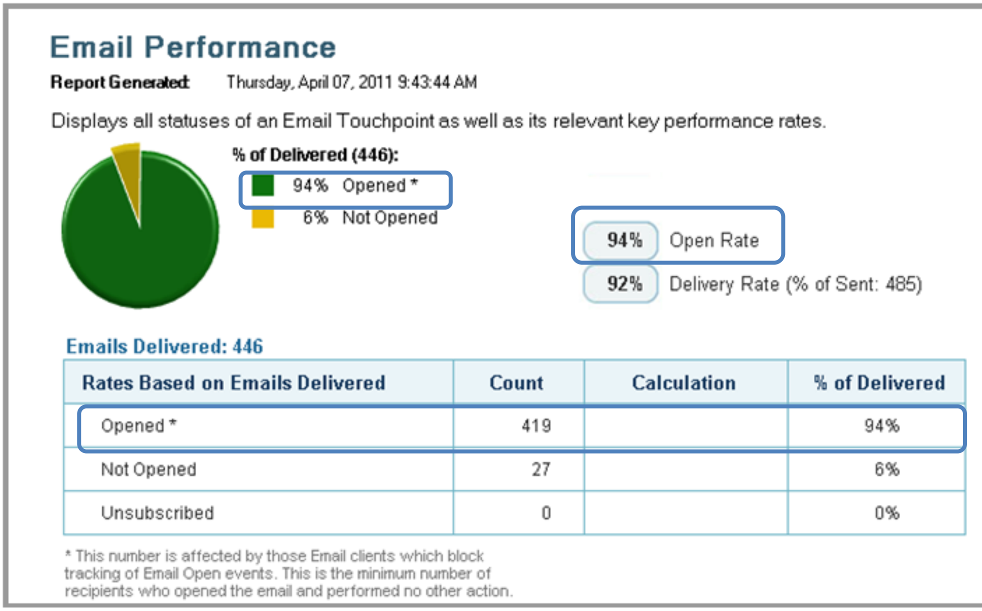
Figure 106: Email Performance Report Results – Open Rate



Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%

The **Open Rate** is calculated based on the sum of the **Visited Web (from the email)** and **Opened (only)** metrics. This rate is based on the total amount of **delivered** emails. For the **Visited Web (from the email)** to be displayed, use the *XMPieRURL* automatic ADOR link to refer the email reader to the RURL website.

Figure 107: Email Performance Report Results – Open Rate without Visited Web metric



Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Opened *	419		94%
Not Opened	27		6%
Unsubscribed	0		0%

The number of the **Opened (only)** emails is affected by those email clients that block tracking of "Email Open" events. This value is the minimum number of recipients who opened the email and performed no other action.

The **Visited Web (from the email)** and **Opened** slices are exploded (stick out of the pie) to indicate that together, they make up the **Open Rate**.

The **Unsubscribed** rate is **not** included in the **Open** Rate.

Not Opened

Figure 108: Email Performance Report Results – Not Opened Rate

Emails Delivered: 4493

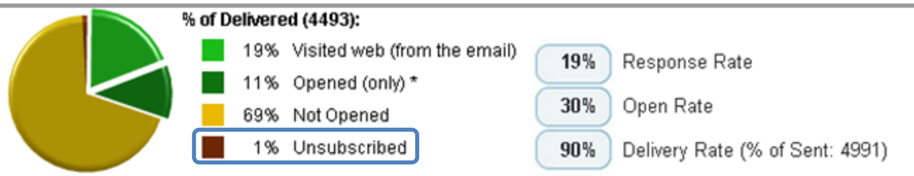
Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%
Not Opened	3082		69%
Unsubscribed	58		1%

This rate represents the number of recipients who did not open the email. The rate is calculated based on the total amount of **delivered** emails:

Not Opened = (**Delivered – (Visited web + Opened +Unsubscribe)) /Delivered**.

Unsubscribed

Figure 109: Email Performance Report Results – Unsubscribed Rate



Emails Delivered: 4493

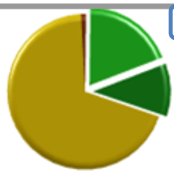
Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%
Not Opened	3082		69%
Unsubscribed	58		1%

The **Unsubscribe** rate represents the number of recipients who clicked the **Unsubscribe** link in this Email Touchpoint, and who did not click the link leading to the RURL website. Recipients who unsubscribed in this Touchpoint are not included in the **Open (only) Rate**. Just like Open (only) only counts those recipients who performed no action other than opening the email, Unsubscribed only counts those recipients who did nothing but unsubscribed in this Touchpoint.

Note: *In this report, a recipient that both* ***Unsubscribed*** *and* ***Visited Web (from the email)*** *is counted as* ***Visited Web (from the email)*** *and not as* ***Unsubscribed****. To count the total number of unsubscribed recipients for this Touchpoint, run the "Email Unsubscribed" report. The recipients who unsubscribed in the previous Touchpoints are counted as "Other Failures" (see the Emails Sent table of this report).*

Delivery Rate

Figure 110: Email Performance Report Results – Delivery Rate



19%	Response Rate
30%	Open Rate
90%	Delivery Rate (% of Sent: 4991)

Emails Delivered: 4493

Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%
Not Opened	3082		69%
Unsubscribed	58		1%

* This number is affected by those Email clients which block tracking of Email Open events. This is the minimum number of recipients who opened the email and performed no other action.

Emails Sent: 4991

Rates Based on Emails Sent	Count	Calculation	% of Sent
Delivery Rate		4493/4991=	90%
Delivered is Sent less total Failures	4493	=4991-498	

The Delivery Rate represents the percentage of emails that were successfully delivered to their recipients:

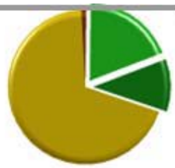
Delivery Rate = (Sent – Failed) /Sent

Please note that multiple batches can be sent for a single Touchpoint. In this case, "Sent" is the total of all the batches.

Some failures can be prevented, for example, by correcting the email addresses before sending the email blast.

Failure Rate

Figure 111: Email Performance Report Results – Failure Rate



19% Response Rate

30% Open Rate

90% Delivery Rate (% of Sent: 4991)

Emails Delivered: 4493

Rates Based on Emails Delivered	Count	Calculation	% of Delivered
Response Rate		863/4493=	19%
Visited web (from the email)	863		19%
Open Rate		1353/4493=	30%
Visited web (from the email)	863		19%
Opened (only) *	490		11%
Not Opened	3082		69%
Unsubscribed	58		1%

* This number is affected by those Email clients which block tracking of Email Open events. This is the minimum number of recipients who opened the email and performed no other action.

Emails Sent: 4991

Rates Based on Emails Sent	Count	Calculation	% of Sent
Delivery Rate		4493/4991=	90%
Delivered is Sent less total Failures	4493	=4991-498	
Failure Rate		498/4991=	10%
Soft bounce	130		3%
Hard bounce	120		2%
Other failures (e.g., invalid, opted out)	248		5%

The **Failure Rate** represents the total number of emails that failed to reach their recipients.

Failure Rate = (Soft bounce + Hard bounce +Other failures)/Sent

Soft bounce: an email message that gets to the recipient's email server but is bounced back undelivered before it gets to the intended recipient (for example, if the recipient's inbox is full). A soft bounce message may be deliverable at another time or may be forwarded manually by the network administrator in charge of redirecting mail on the recipient's domain.

Hard bounce: an email message that has been returned to the sender because the recipient's address is invalid.

Other failures: all failed emails that are due to reasons other than soft or hard bounce, for example, invalid emails or emails to recipients who previously opted out by unsubscribing.

Email Clicks Population Report

Note: *This report is not supported by uProduce version 6.2 and therefore is not visible in the Marketing Console report tree. Once it is supported in future versions of uProduce, the report will appear in the report tree.*

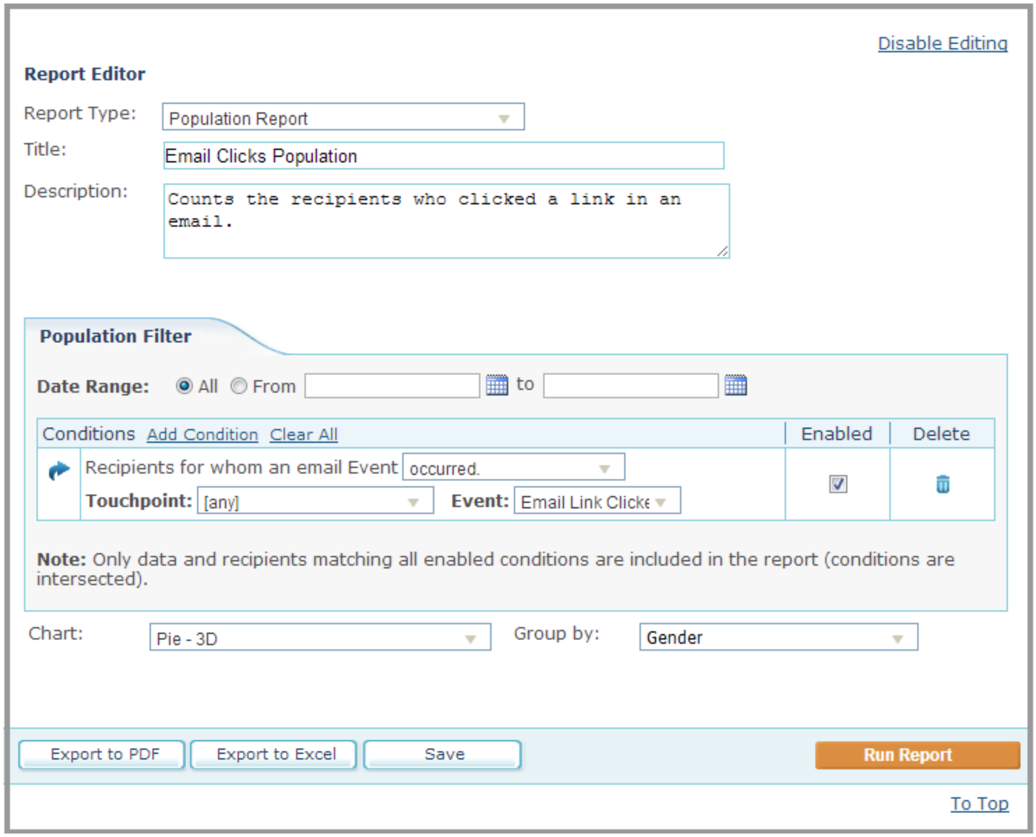
The Email Clicks Population Report counts recipients that clicked a link in the email.

To generate an Email Clicks Population Report:

1. In the Reports tree, select **General Reports** > **Email** > **Email Clicks Population**.

   The **Report Editor** page displayed:

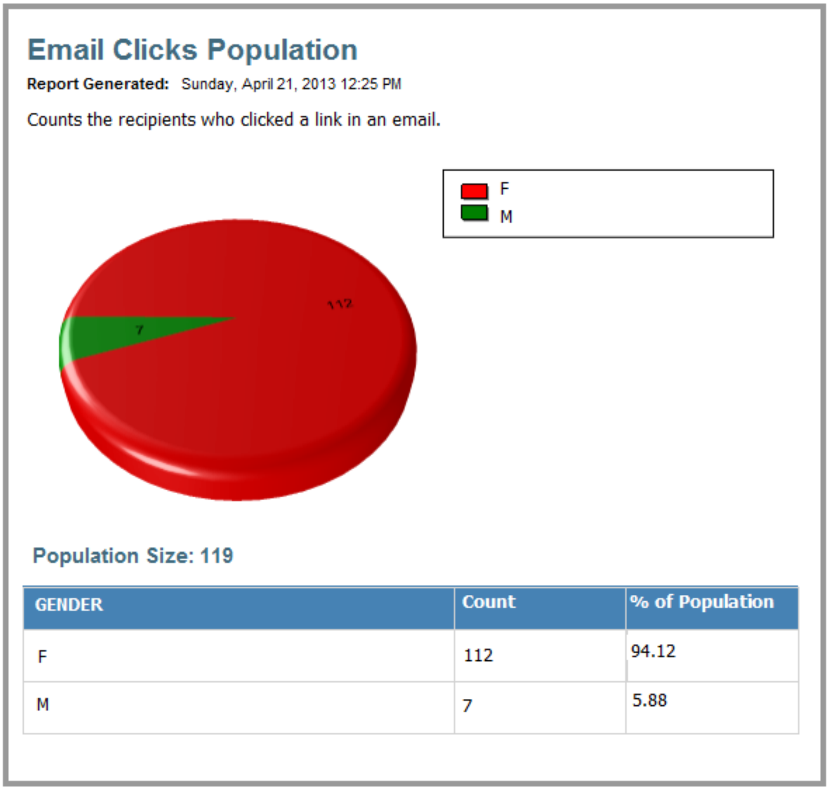
Figure 112: Email Clicks Population Report



2. In the **Touchpoint** drop-down list, select the Touchpoint. This selection filters recipients who clicked a link in the specified Touchpoint.
3. To narrow down the report to specific results:
   a. Define the **Date Range** filter.
   b. Click **Add Condition** (see Population Filter on page 87).
4. In the **Chart** drop-down list, select the chart type.
5. Set the **Group By** list to the Recipient-Attribute by which you wish to group the results.
6. Click **Run Report** to generate a report.

   The report output is displayed:

Figure 113: Email Clicks Population Report Results


Email Clicks Population

Report Generated: Sunday, April 21, 2013 12:25 PM

Counts the recipients who clicked a link in an email.

Population Size: 119

GENDER	Count	% of Population
F	112	94.12
M	7	5.88

In this example, we can see that the campaign is more successful with women.

The Email Clicks Population report can be exported to the Excel file (see Exporting Report Results on page 42).

Email Clicks Population List Report

> ***Note:*** *This report is not supported by uProduce version 6.2 and therefore is not visible in the Marketing Console report tree. Once it is supported in future versions of uProduce, the report will appear in the report tree.*

The Email Clicks Population List Report lists recipients who clicked a link inside an email.

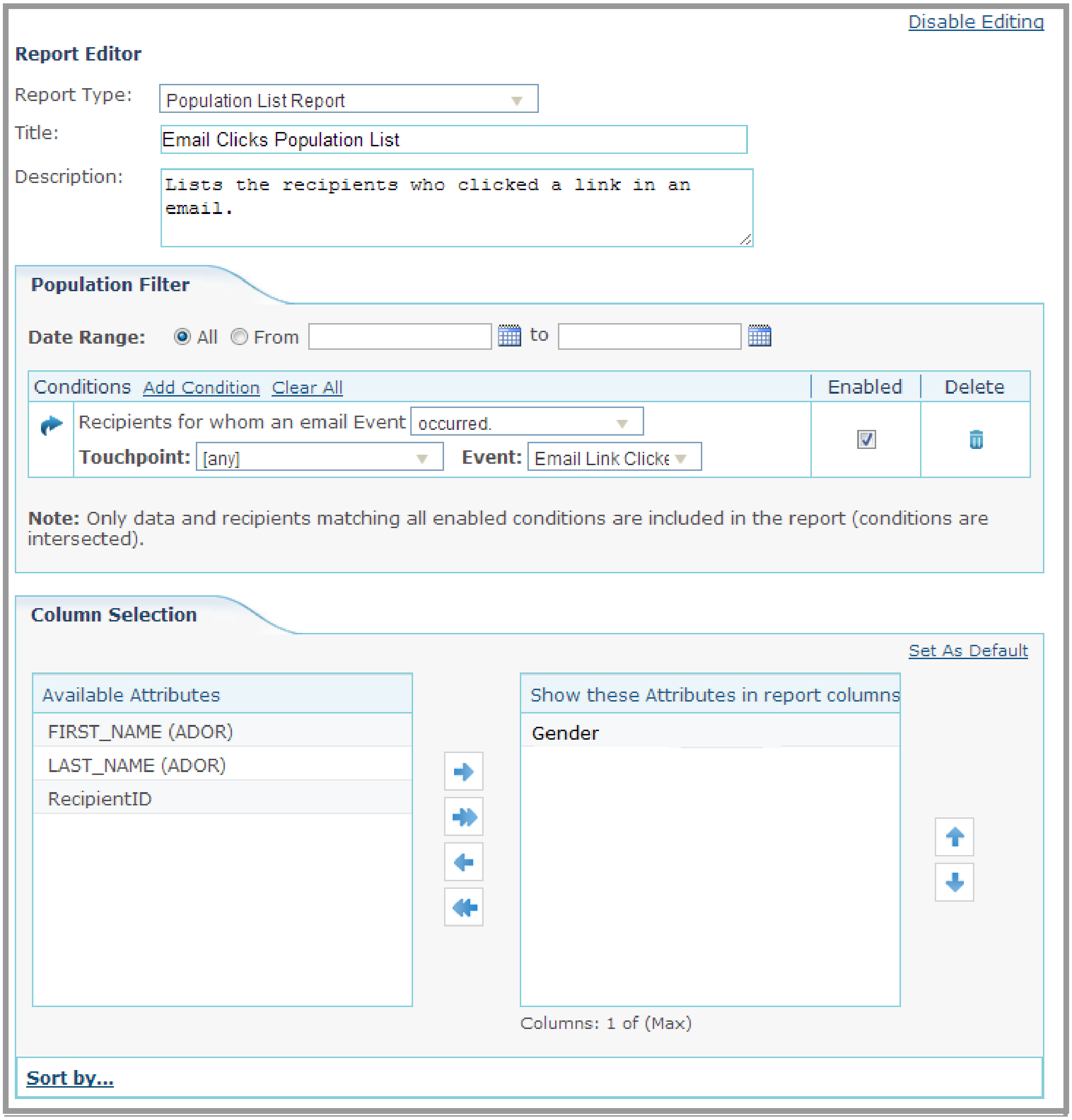
Generating Email Clicks Population List Report

To generate an Email Clicks Population List Report:

1. In the Reports tree, select **General Reports** > **Email** > **Email Clicks Population List**.

   The **Report Editor** page displayed:

Figure 114: Email Clicks Population List Report



2. In the **Touchpoint** drop-down list, select the Touchpoint. This selection filters recipients who clicked a link in the specified Touchpoint. If there is a recipient who clicked a link in the specified Touchpoint and in other Touchpoints, both clicks will be listed in the report.

3. To narrow down the report to specific results:

   c. Define the **Date Range** filter.

   d. Click **Add Condition**. The **Condition Wizard** is displayed. Define your conditions as described in Population Filter on page 87.

4. In the **Column Selection** section, select the Attributes to be listed in the report from the list of **Available Attributes** and click the arrow pointing right ( ) to add them to the **Show these Attributes in Report Column** (for more details on working with Population List reports, see Population List Report on page 67).

   Please note that in addition to the columns selected in this section, the report displays pre-defined columns whose values are retrieved from the XMPie Tracking database:

   - **RecipientID**
   - **Touchpoint**
   - **Email Address**
   - **Link URL**

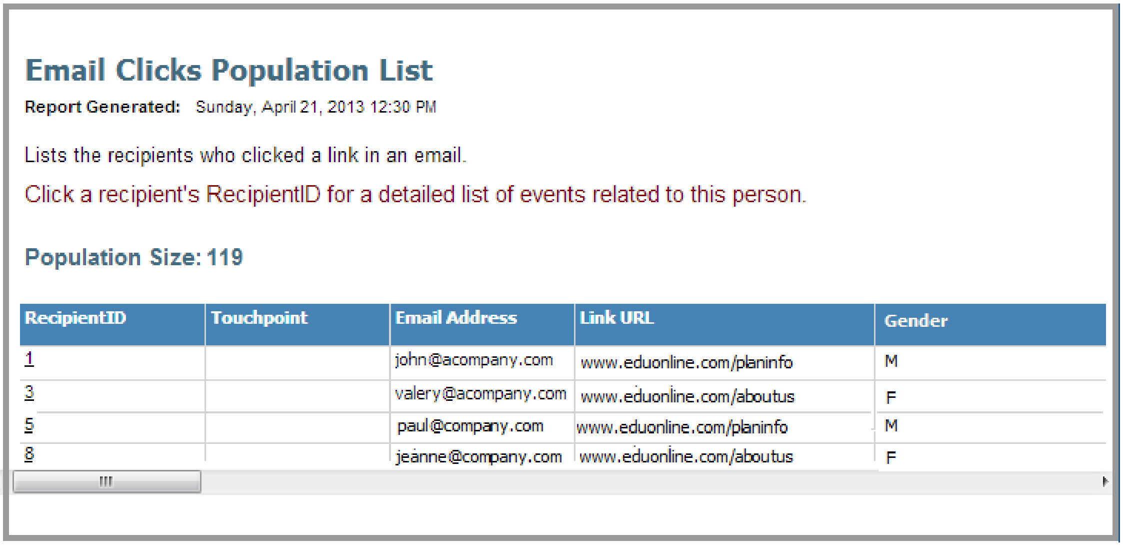
   For more information about these fields, see Analyzing the Email Failure Population List Report on page 146.

5. In the **Sort by...** section, define the columns by which the results are sorted.

6. Click **Run Report** to generate a report.

   The report output is displayed:

Figure 115: Email Clicks Population List Report Results



Email Clicks Population List

Report Generated: Sunday, April 21, 2013 12:30 PM

Lists the recipients who clicked a link in an email.

Click a recipient's RecipientID for a detailed list of events related to this person.

Population Size: 119

RecipientID	Touchpoint	Email Address	Link URL	Gender
1		john@acompany.com	www.eduonline.com/planinfo	M
3		valery@acompany.com	www.eduonline.com/aboutus	F
5		paul@company.com	www.eduonline.com/planinfo	M
8		jeanne@company.com	www.eduonline.com/aboutus	F

Note that all user-specified columns appear **after** the "pre-defined" Email Clicks Report columns.

Clicking the link in the **Recipient ID** column of the report table opens the list of events for that recipient (Figure 56 on page 74).

The Email Clicks Population List report can be exported to the Excel file (see Exporting Report Results on page 42)

Analyzing Email Clicks Population List Report

The Email Clicks Population List Report lists email clicks-related information, as it is recorded in the XMPie Tracking database. The following pre-defined columns are included in the report:

- **RecipientID** — the primary key of the recipient as defined in the Campaign's Plan file.
- **Touchpoint** — the name of the Touchpoint in which the email click event occurred.
- **Email Address** — the email address of the recipient who clicked a link in an email.
- **Link URL** — the URL of a link that was clicked. This column can also include ADOR Objects, Unsubscribe and View in Browser links.

Email Failure Population List Report

***Note:** The Email Failure Population List report only works on SQL Server 2008R2 and above. In Marketing Console installations on SQL Server 2005, the new report will not appear in the reports list.*

Email Failure Population List report lists recipients whose emails failed to be delivered and provides failure details for each failed email. This report is extremely detailed and reports all failure types and reasons.

There are two other reports that also present information related to email failures:

- **Email Performance Report** presents the failure rate as a percentage of failed emails with respect to the total amount of sent emails (see Email Performance Report on page 126).
- **Email Failure Population** report counts the number of email failures.

As opposed to the above-mentioned reports, the Email Failure Population List report allows you to easily identify the failure reason, time and category and thus, helps you to correct the issue in question.

This report differs from the regular Population List reports (see Population List Report on page 67) in that, in addition to the columns selected by the customer, it displays additional pre-defined columns providing email failure details. For each email delivery failure, you will know the Touchpoint, the email address, the failure time and type, the bounce category and time as well as SMTP Code and reason.

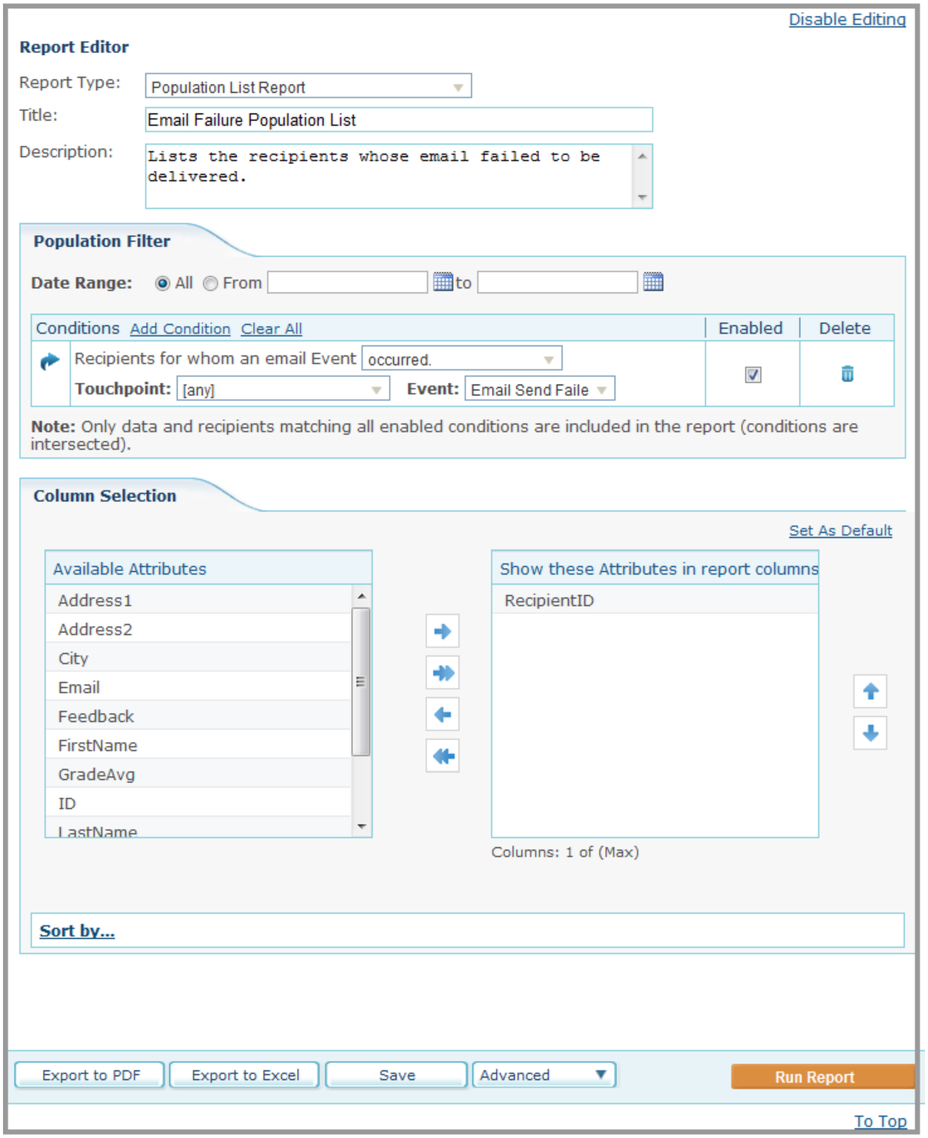
Generating the Email Failure Population List Report

To generate an Email Failure Population List Report:

1. In the Reports tree, select **General Reports** > **Email** > **Email Failure Population List**.

   The **Report Editor** page displayed (Figure 118 on page 144):

Figure 116: Email Failure Population List Report



2. In the **Touchpoint** drop-down list, select the Touchpoint for which you would like to run the report. Please note that although the Touchpoint selection determines the list of the recipients whose emails failed to be delivered for the selected Touchpoints, the report displays email failures in all Touchpoints for a given recipient.

3. To narrow down the report to specific results:

   a. Define the **Date Range** filter.

   b. Click **Add Condition**. The **Condition Wizard** is displayed. Define your conditions as described in Population Filter on page 87.

4. In the **Column Selection** section, select the Attributes to be listed in the report from the list of **Available Attributes** and click the arrow pointing right () to add them to the **Show these Attributes in Report Column** (for more details on working with Population List reports, see Population List Report on page 67).

   Please note that in addition to the columns selected in this section, the report displays pre-defined columns whose values are retrieved from the XMPie Tracking database:

   - **RecipientID**
   - **Touchpoint**
   - **Job ID**
   - **Email Address**
   - **Fail Time**
   - **Fail Type**
   - **Bounce Category**
   - **Bounce Type**
   - **SMTP Code**
   - **SMTP Reason**

   For more information about these fields, see Analyzing the Email Failure Population List Report on page 146.

5. In the **Sort by...** section, define the columns by which the results are sorted.

6. Click **Run Report** to generate a report.

   The report output is displayed (Figure 104).

Figure 117: Email Failure Population List Report Results

Email Failure Population List

Report Generated: Monday, September 10, 2012 11:47 AM

Lists the recipients whose email failed to be delivered.

Click a recipient's RecipientID for a detailed list of events related to this person.

Population Size: 5

RecipientID	Touchpoint	Job ID	Email Address	Fail Time
John Smith	TP distributed 1-10	1922	amitho445@gmail.com	Sep 10 201
Paul.Thompson	TP distributed 1-10	1922	itayho702@gmail.com	Sep 10 201
Mary.Davis	TP distributed 1-10	1922	Mary.Davis@xmpie.com	Sep 10 201
Kate.Black	TP distributed 1-10	1922	missingC@xmpie.om	Sep 10 201
Sam.Brown	TP distributed 1-10	1922	Sam.Brown@gmail.om	Sep 10 201

Note that all user-specified columns appear **after** the "pre-defined" Failure Report columns.

Clicking the link in the **Recipient ID** column of the report table opens the list of events for that recipient (Figure 56 on page 74).

Analyzing the Email Failure Population List Report

The Email Failure Population List Reports displays email failure-related information, as it is recorded in the XMPie Tracking database. The following pre-defined columns are included in the report:

- **RecipientID** — the primary key of the recipient as defined in the Campaign's Plan file
- **Touchpoint** — the name of the Touchpoint in which the email delivery failure occurred.
- **Job ID** —Email Job ID in uProduce
- **Email Address** — the email address to which the email failed to be delivered
- **Fail Time** — the time at which the email failure occurred
- **Fail Type** —the type of failure:
    - **Hard Bounce**: a hard bounce occurs when the email server rejects the email due to permanent conditions, such as "user unknown" or "domain not found".

  - **Soft Bounce**: a soft bounce occurs when the email server rejects the email due to a temporary condition, such as a full inbox. In that case, the system will retry sending the email to the intended recipient at another time.
  - **Other Bounce**: all failed emails that are due to reasons other than soft or hard bounce, for example, emails to recipients who previously opted out by unsubscribing.
- **Bounce Category**— for each bounce type, more detailed information is provided regarding the failure reason. Some of the examples of Bounce Categories are:
  - **Hard bounce**
    - **Hard bounce - User Unknown**: email could not be delivered because the email address is unknown
    - **Hard bounce - Domain Unknown**: email could not be delivered because the recipients domain was not found or does not exist
    - **Hard bounce - Bad Address Syntax**: email address is invalid
    - **Hard bounce – High Unknown Address Percentage**: Email is blocked due to the high quantity/percentage of unknown or inactive addresses on your list
    - **Hard bounce – Other**: Address is invalid and/or failure is permanent per bounce message
  - **Soft bounce**
    - **Soft bounce -Mailbox Full**: Recipient's mailbox is full or has exceeded storage allocation
    - **Soft bounce – Inactive Account**: Address is temporarily unavailable as the recipient's mailbox is inactive or temporarily disabled
    - **Soft bounce – Temporary Domain Failure**: Temporary failure at the receiving domain
    - **Soft bounce – Other**: Mailbox temporarily unavailable or indecipherable bounce message received
  - **Block bounce** (type of Soft Bounce)
    - **Block bounce – Blocked**: email could not be delivered due to filter issues.
    - **Block bounce – Content**: Message was filtered due to content
    - **Block bounce – Complaint**: Your email is blocked due to complaints
    - **Block bounce – Blacklist**: IP address is on a blacklist
    - **Block bounce – URL Block**: Emails containing your URLs are blocked
    - **Block bounce – Authentication**: Message lacks required authentication

- **Technical bounce** (type of Soft Bounce)
  - **Technical/Other bounce - Server Too Busy**: receiving email server is temporarily overwhelmed with delivery attempts from you and other senders
  - **Technical/Other bounce – Data Format Error**: Email is rejected due to formatting or line length errors
  - **Technical/Other bounce – Network Error**: connection lost or timed out during delivery line length errors

- **Bounce Type**—whether the email bounce occurred immediately or was delayed:
  - **immediate**: a bounce that occurred immediately, during the attempt to deliver the email to the remote server.
  - **delayed**: an email is accepted by the remote SMTP server without any errors and it takes time for this server to process it. As a result, a mail delivery failure can be returned between 1 minute and many days later from the original delivery. These types of messages usually arrive from the postmaster or a similar type address at the delivery site. These messages usually describe the failure scenario and the reason for the failure.
- **SMTP Code** — an SMTP error code describing the email failure
- **SMTP Reason**—the reason for email failure

Chapter 6: Administration Options

Marketing Console allows Operators to manage Campaign Attributes and their values. Additional administrative tasks are available for Administrators only.

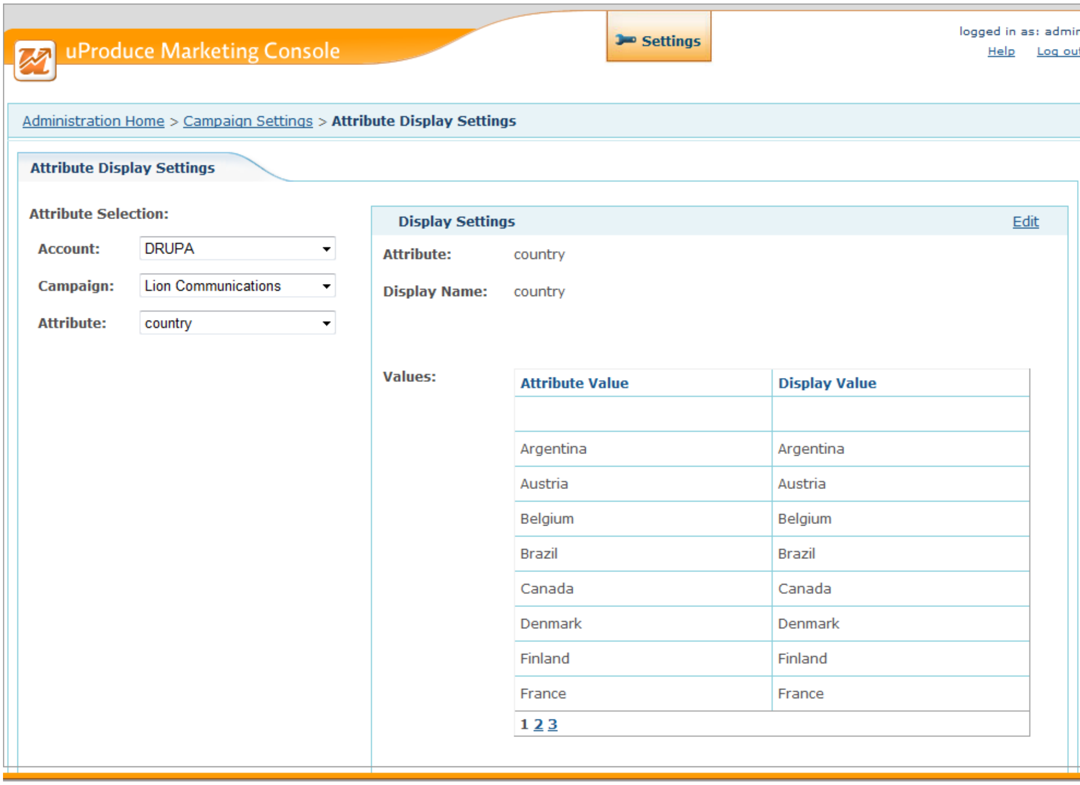
Attribute Display Settings

Attribute Display Settings page allows users to define a custom Display Name for all Attributes and their Values. Custom names are displayed throughout the customer application instead of the original names.

The **Attribute Display Settings** page is divided into two sections:

- **Attribute Selection**: allows you to select the **Account**, **Campaign** and the **Attribute** to be customized.
- **Display Settings**: shows the Attribute's Display Name and Values.

Figure 118: Marketing Console—Administration - Attribute Display Settings



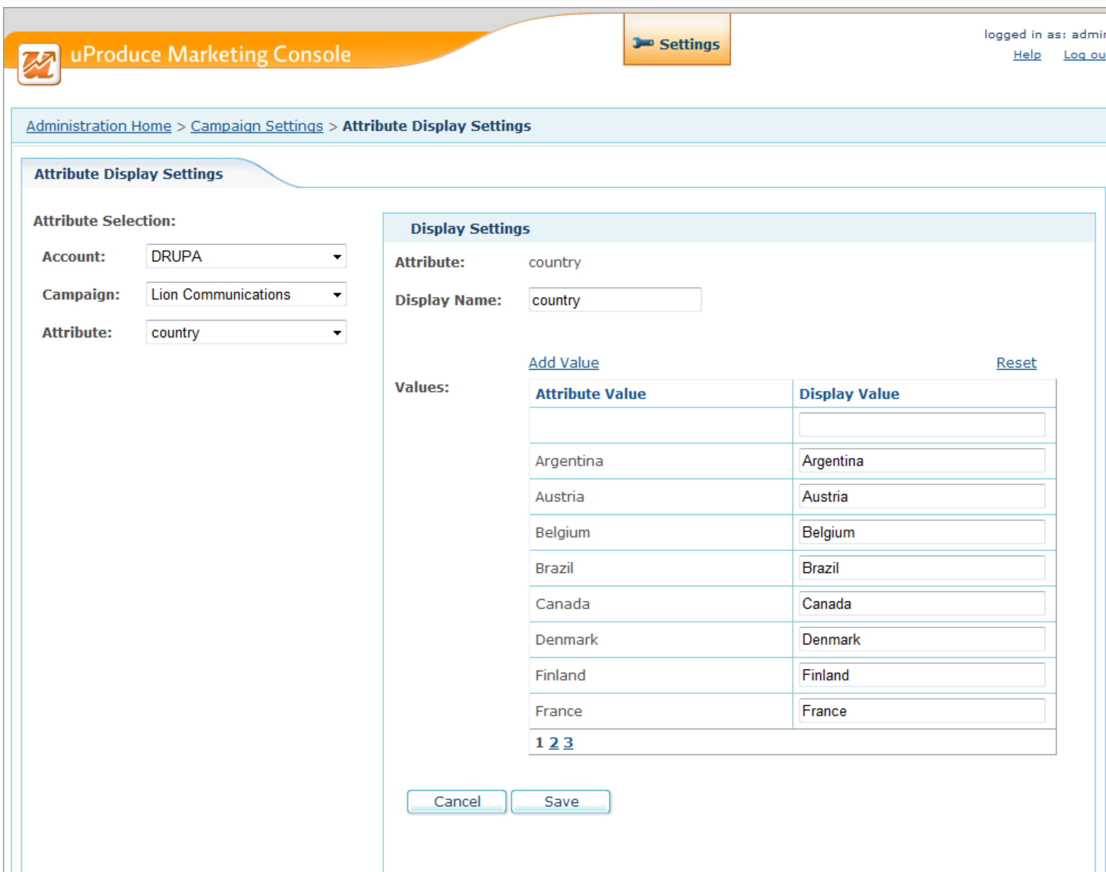
In the Read-Only mode, the **Display Settings** pane (on the right) shows the following information:

Field	**Description**
Attribute	The name of the Attribute. For ADOR Object Attributes this is the name as it appears in the uProduce Plan file.
Display Name	The Attribute name as it will appear in the Reports. By default, **Display Name** is identical to **Attribute** name.
Values	Shows a table matching the **Attribute Value** and the **Display Value**. By default, the table is sorted by **Attribute Value.** Clicking the header sorts the table/changes the sort order.

Editing the Attribute Display Settings

To start editing the Attribute Display Settings, click the **Edit** link in the top right corner of the **Display Settings** pane (Figure 118). The **Attribute Display Settings** page is displayed in the Edit mode.

Figure 119: Marketing Console—Attribute Display Settings- Edit Mode



To edit the Attribute Display Settings:

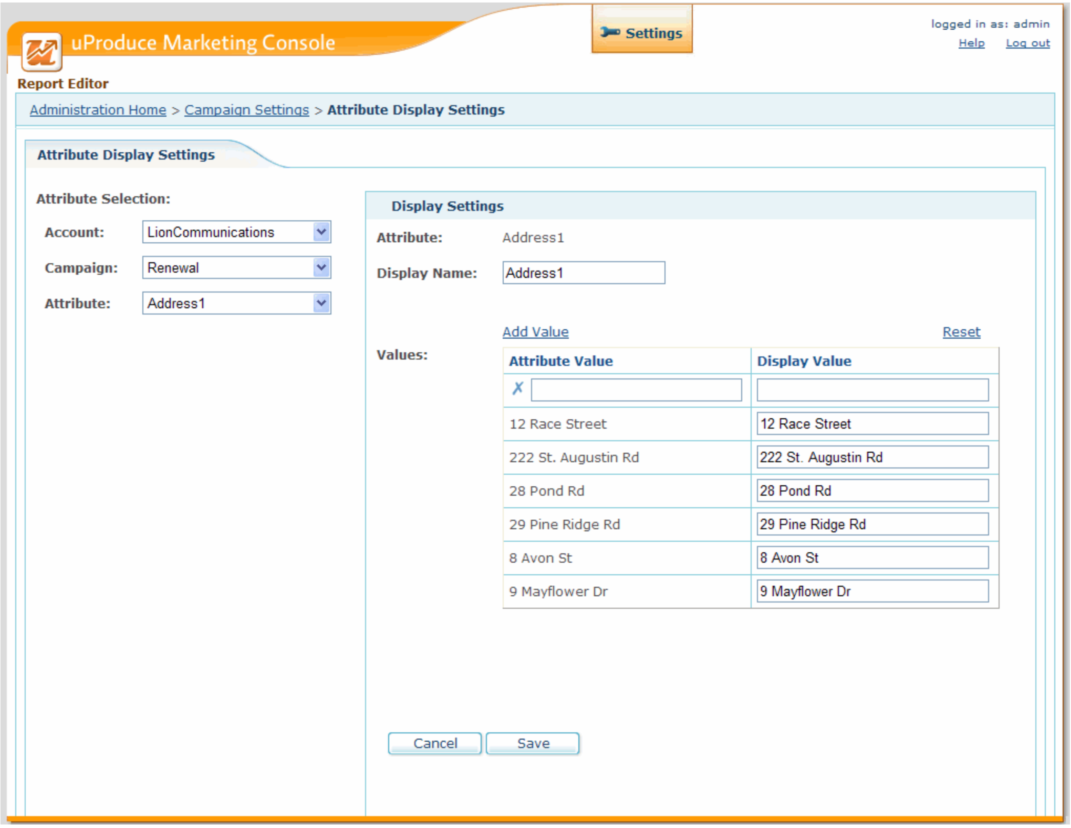
1. Click the **Edit** link in the top right corner of the **Display Settings** pane.

2. In the **Display Name** field, enter the customized name of the Attribute as it will appear in the Reports.

3. In the **Values** table, edit the Display Values of the existing Attribute Values. In addition, you have the option to *add* more Attribute Values by clicking the **Add Value** link. When *adding* a new value, a new record is added to the **Values** table in which you can define the **Attribute Value** and assign it a **Display Value**. There is an option to *delete* the added records by clicking the **Delete** icon next to the last added record.

   Clicking the **Reset** link restores the default settings in the **Values** table: all Display Values become identical to their matching Attribute Values, and all added lines are removed.

   Figure 120: Marketing Console—Adding Attribute Value



4. Click **Save**.

Appendix A: Marketing Console Web Application

Introduction

The XMPie Marketing Console web application (named *XMPie MC*) allows users to view their Campaign status anytime anywhere.

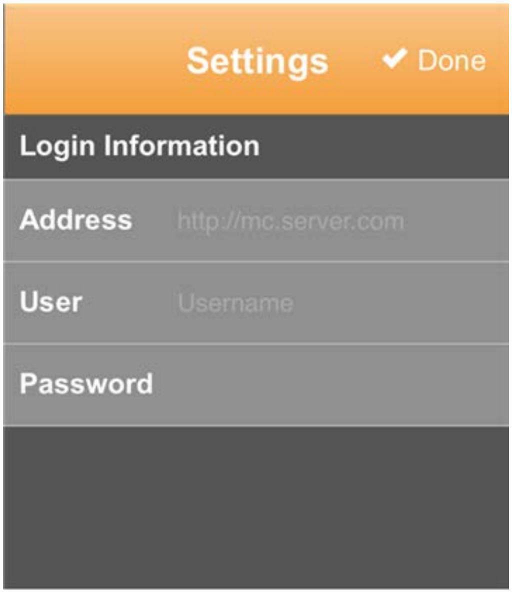
Setting Up Login Credentials

The first time you access the *XMPie MC* application, you are required to configure its login credentials.

To set up Login Information:

1. Go to mc.xmpie.com.
2. Go to **Settings**.

Figure 121: XMPie MC Settings



3. In the **Address** field, enter the server domain name or IP address. For example, if you access your Marketing Console application as http://myserver.mycompany.com/marketingconsole, then specify `http://myserver.mycompany.com` in the **Address** field.

4. In the **User** and **Password** fields, enter your Marketing Console username and password, respectively.

5. Click **Done**.

Accessing XMPie MC Application from your Home Screen

To access Marketing Console Web application, open your mobile browser and go to mc.xmpie.com.

It is recommended to add a shortcut to the *XMPie MC* web application to the home screen of your mobile device. This should be done after you have completed and saved your Settings. This will enable you to quickly access the Accounts page of the web application without retyping in the Settings.

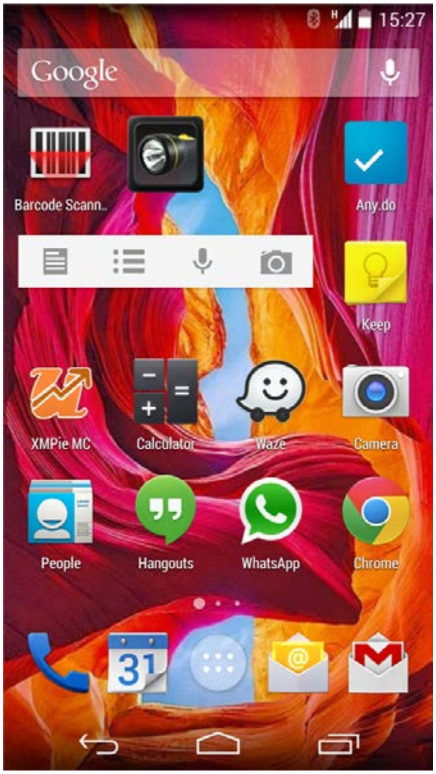
To save an application shortcut to your mobile device home screen perform the following steps.

Adding XMPie MC Shortcut on Android Devices

1. From the **Accounts** page, open the browser's menu and select **Add to homescreen**.

   The *XMPie MC* shortcut is added to your home screen:

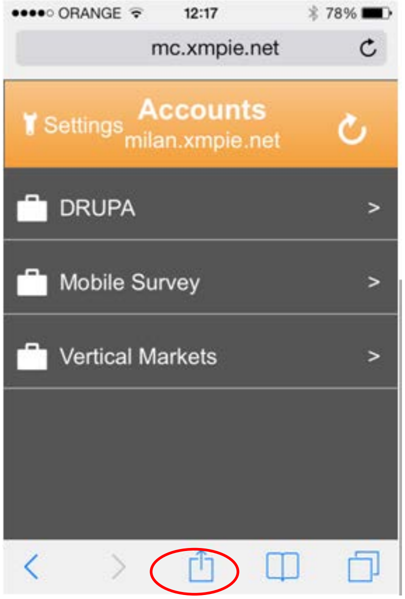
Figure 122: XMPie MC shortcut- Android



Adding XMPie MC Shortcut on iPhone

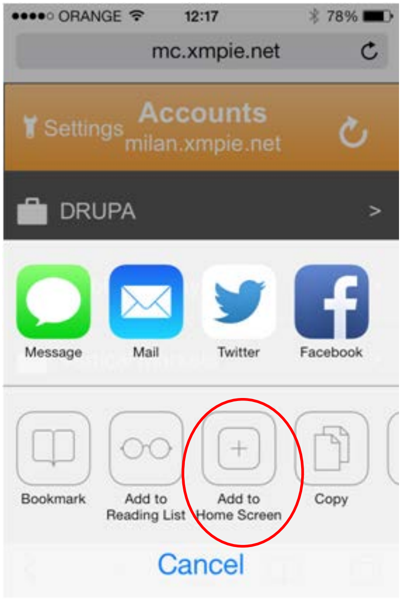
1. From the **Accounts** page, click the browser's **Share** button.

Figure 123: XMPie MC shortcut on a home screen



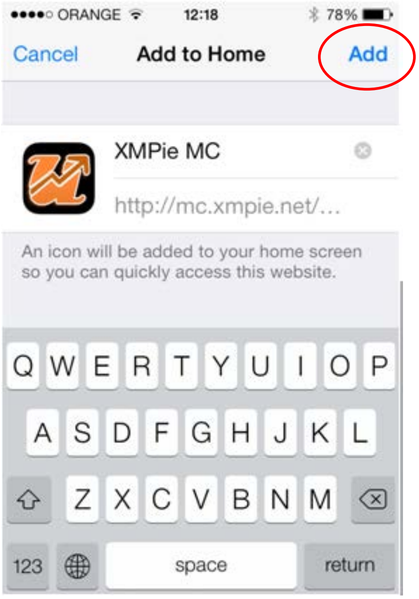
2. In the Share menu, click **Add to Home Screen** button.

Figure 124: XMPie MC shortcut – Add to Home Screen



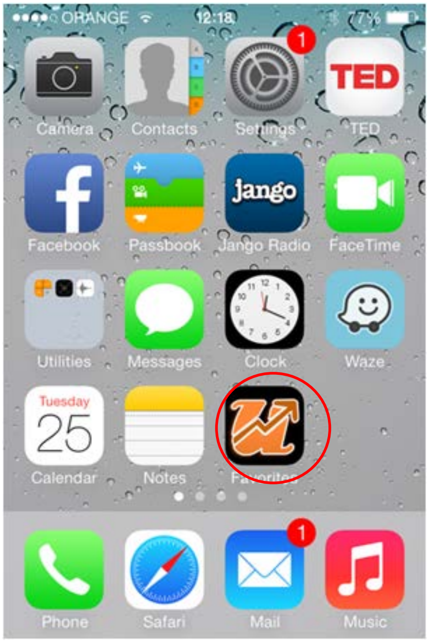
3. In the **Add to Home** page, click **Add.**

Figure 125: XMPie MC shortcut – Add to Home



The XMPie MC shortcut is added to your home screen:

Figure 126: XMPie MC shortcut - iPhone

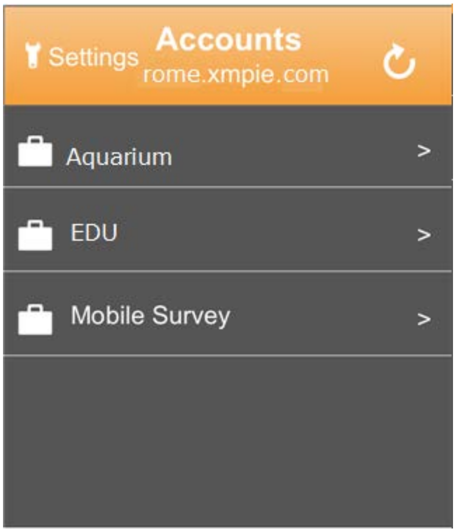


Getting Started

To start using the *XMPie MC* application:

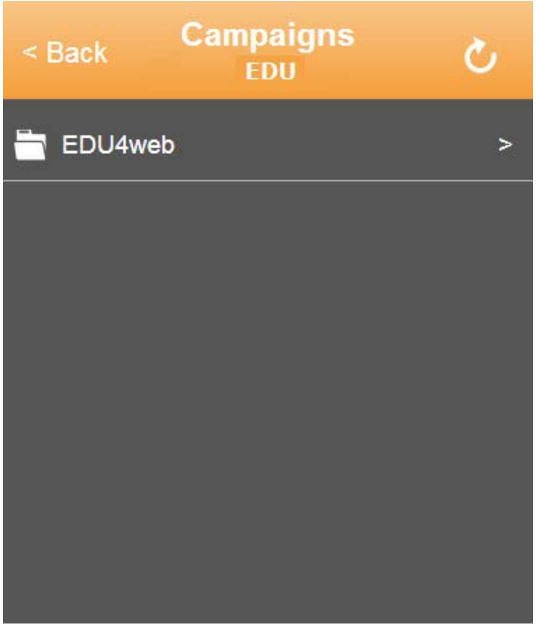
1. In the **Accounts** list, select an Account.

Figure 127: XMPie MC – Selecting an Account



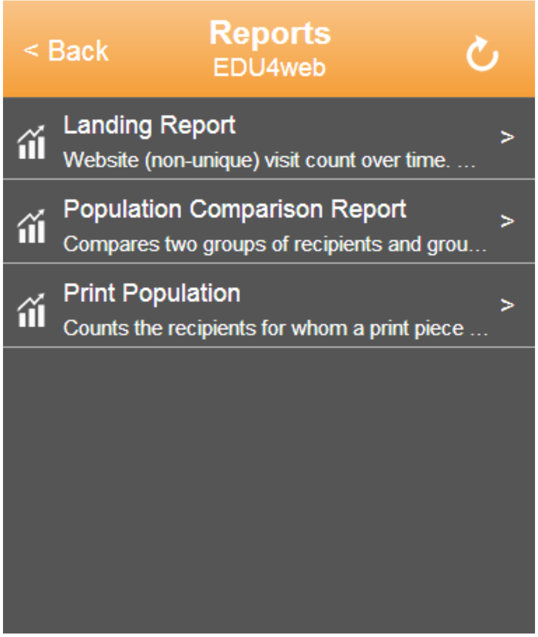
2. In the **Campaigns** list, select a Campaign.

Figure 128: XMPie MC – Selecting a Campaign



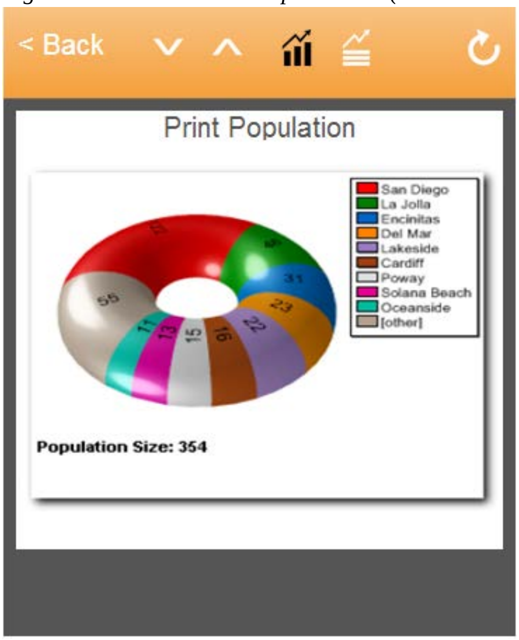
3. In the **Reports** list, select the report. Only reports that appear in the Marketing Console Dashboard are available for selection.

Figure 129: XMPie MC – Selecting a Report



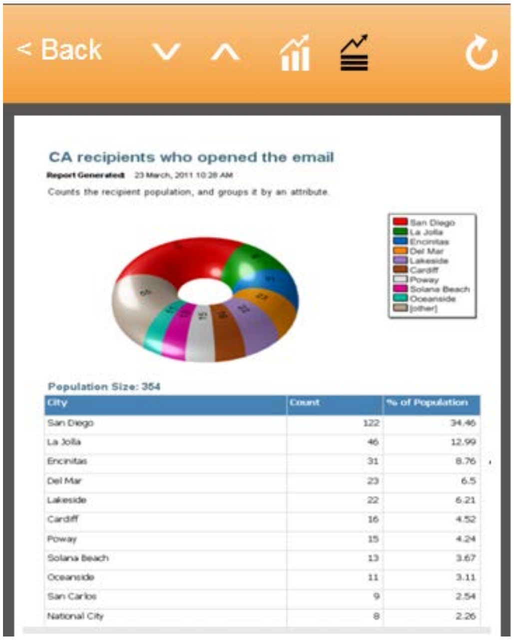
The report chart is displayed:

Figure 130: XMPie MC – Report Chart (Dashboard View)



4. Toggle the buttons to switch between the Dashboard view ( ) and the detailed view ( ). The detailed view displays both the chart and the table.

Figure 131: XMPie MC – Report Chart (Detailed View)



5. Marketing Console reports are calculated over night to ease on the database load. To receive the most up-to-date values, click the Refresh () button. Clicking this button reloads the Account, Campaigns, and Report lists.

Glossary

Administrator—a system manager who works for the service provider.
The Administrator controls the Service Levels, User Roles and various application settings in the entire system (for details, see *Marketing Console Administrator's Guide*).

Analysis Timeframe—events occur throughout the time frame of the campaign. It is possible to run a report only on events that occur within a certain time frame, a.k.a the Analysis Timeframe. For example, if the Analysis Timeframe is between November and December, an event that occurred in June would not be included in the reports.

Analyst—a marketing analytics professional, who may work for the service provider (an internal user), but is typically a customer (an external user). This is the default role given to all non-administrator uProduce users. The Analyst's reporting permissions depend on the product's Service Level:

- Standard Service Level—allows Analysts to view (i.e. run) reports defined especially for them by Operators.
- Professional Service Level—allows Analysts to view reports defined by Operators, and modify and create their own reports, both for personal use and for the use of others.

Attribute—a descriptive of a Recipient or of an Event associated with a Recipient, for example, Gender, Country, Email or Browser-Type.

Attribute Condition — a condition based on a Recipient Attribute, for example, filtering all recipients who are Female and live in New York.

Attribute Display Settings—the **Attribute Display Settings** page allows users to define a custom Display Name for all Attributes and their Values. Custom names are displayed throughout the customer application instead of the original names. It is the alias used to display the attribute. For example, "F" and "M" are attribute values, because this is their representation in the database. However, their display names would be "Female" and "Male" respectively.

Campaign —represents the workspace for the marketing campaign. It is a container project for all Documents, Emails, and Web Sites used in the marketing campaign.

Campaign History (Behavior)—the collection of all events.

Usage: Tracking creates and adds to the Campaign History. Analysis is reviewing, analyzing, dissecting, selecting, and presenting aggregates of Campaign history.

Condition—a criterion for filtering or selecting a population or a timeframe. In the XMPie Marketing Console, there are three types of conditions:

- Attribute Condition
- Event Condition
- Event-Sequence Condition

Each class of condition may have one or more options.

Dashboard — the Dashboard tab allows you to monitor reports of interest, all in a single view. You can add reports of interest to this tab to obtain the status of the Campaign at a glimpse.

Date Range Filter—a filter criterion that limits the Analysis Timeframe. The criterion selects only the population for which events occurred in the specified date range

Edition— Marketing Console is available in three Editions: Express, Signature or Premier. The editions are controlled by the respective PE Analysis license.
Event— the occurrence of an action relating to the Campaign. An event is recorded per recipient (for example, a single print job for 100 recipients will yield 100 print events, one for each recipient).

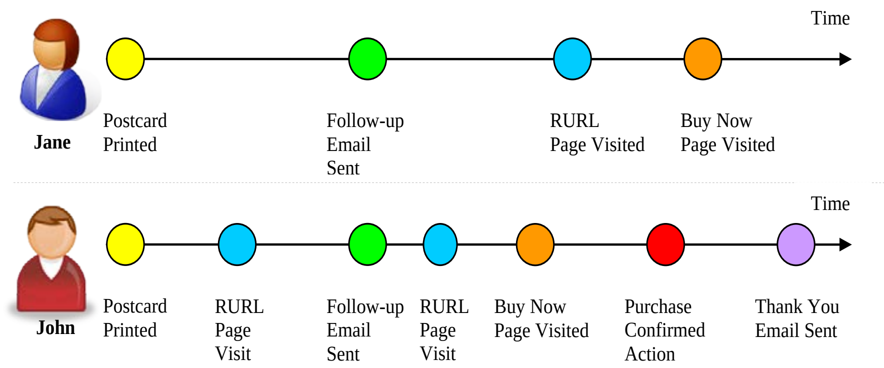
Usage: The user can filter the population based on who has a specific event in their sequence. For example, the Population defined by "email-delivered" event-filtering is the group of individuals for whom the email was delivered successfully.

Event-Attribute—defines the details of an event (for example, which-recipient is associated with the event, what event-type, which Touchpoint, which IP, which web-page etc.). These Event-Attributes are used in the Event and Event-Sequence conditions.

Event Condition—a filter criterion that selects only population for which the specified event has occurred (within the *Analysis Timeframe*), for example, all recipients that opened the email. Negation Condition also exists; in this case, the criterion selects the population for which an event has *not* occurred (within the Analysis Timeframe).

Event Sequence—the flow of Campaign events over time per-individual of the Population. For each individual, a different event sequence may unfold over time. The sequence of events unfolds as the system or the user create additional events. A typical event sequence would be: postcard printed → email-sent → email-delivered → page-visited → another page-visited → button-clicked (Figure 132).

Figure 132: Event Sequence Example



The sequence of events may consist of outbound and inbound events. The outbound events are typically initiated by the XMPie user (for example, print, email); the inbound events reflect external activities (for example, page-visited, email-failed, response-sms sent). The event sequence (per individual in the population) is a single dimensional flow of events in the time dimension.

Usage: The sequence is used in the *Event-Sequence Condition* to do one of the following:

- Select individuals that have their sequence of events ordered in a specific way. For example, only individuals who received a follow-up email before they visited the RURL webpage. Jane in the example above would be selected. John would not be selected.
- Analyze recipient-attribute values in a certain phase. For example, to analyze the recipient preferred-offer in the phase prior to the page visit (because the user might have modified his preference in the page visit).

Note: the event-sequence is the logical progression of time in a Campaign. It allows examining progress in the Campaign behavior without stating it in terms of absolute time. In analyzing Campaign behavior, it is important to examine things in terms of their intended "cause and effect" progression and not just in terms of absolute time.

Event-Sequence Condition—a filter criterion that limits the Analysis Timeframe for each population individual individually. The timeframe is defined as time before a specified boundary event. The boundary event is specified in the condition. The condition selects only the population for which events occurred before the specified boundary event.

Express Edition —one of the Marketing Console editions. It offers end customers a Standard Service Level, with a view-only permission to run Custom Reports, defined especially for them by the Service Provider. This is a legacy edition that is no longer available for sale.

Filter—a selector of a Population. It is applied to the input Population (the input is always the entire population of the Campaign) and generates the output (or resulting) Population. It is a series of conditions that must be satisfied inclusively by every individual that is selected into the output Population.

Landing Over Time Report — a report that represents how many recipients interacted with the website at any given time, for example, on Monday - 423 recipients, on Tuesday - 313, and on Wed 223 recipients.

Operator—a marketing analytics professional. The Operator has full permissions to view, edit and create custom reports, which are mainly intended for Analysts. To make sure the reports serve the Analyst's needs, the Operator needs to test them in the Analyst's environment (i.e. Service Level). In the Premier and Signature Editions, the two users may have different Service. In this case, the Operator needs to toggle the Service Level, which is a special permission controlled by the Administrator.

Other Condition—a filter criterion that selects the population for which an *external* (non-XMPie) event has occurred within the Analysis Timeframe. This condition allows you to expand your Campaign analysis, to include events generated by other systems, such as Campaign-related phone calls or text messages. Just like the Event Condition, the Other Condition supports a Negation Condition; in this case, the criterion selects the population for which the specified external event has *not* occurred (within the Analysis Timeframe).

Plan—refers to a Plan file that describes how customer data is transformed into ADOR Objects. For instance, the customer data "22 Nov 1990" can be defined in the Plan file to be read as-is or to be converted to an age, for example "20".

Population—the recipients, contacts or people who are involved in the receiving or responding end of a Campaign.

Usage: Used to describe a segment of all the population of the Campaign that adheres to certain list of conditions defined in a Population Filter.

Population Report—a view of a population segmented and grouped by one specific recipient-attribute (that is, gender, city, etc.). One selects Populations by using "Population Filters" that can be applied via any number of conditions or constraints on the attributes of the Campaign. A Population report may or may not have filtering condition applied. If there is no filtering, the complete population is used for the report.

For example, of a Population segmented by gender: If a direct mail piece was sent to 10,000 contacts and 5,000 were sent to females and 5,000 were sent to makes – the report would indicate it in just this way and as a percentage (50% female; 50% male). No reference to individual contacts.

Population Comparison Report—a way of looking at two Population Reports viewed side-by-side. Each population is grouped/segmented by the same recipient-attribute (as above). The two reports will likely have different filtering criteria applied. Otherwise there is little value in comparison. This feature will help marketers understand how a specific segment can be compared relative to characteristics of the population and or Touchpoint (for example, attribute, Touchpoint (event) or event sequence).

Population List (Report)—drill-down listings of all individual members or contacts participating in a given Campaign and matching the population filter. The recipient ID and the selected attributes are listed in the report.

Recipient —an individual that is targeted by the marketing campaign.

Recipient-Attribute—defines the details of the recipient (for example, his gender, the city he lives in, whether he belongs to a loyalty-group, his preferred-product color, his browser-info, etc.). Some attributes may change over time (for example, preferred-product-color may change). The recipient-attributes typically relate to details that help segment a Population. These attributes are used in the Recipient-Attribute condition, and for grouping the data in a report.

Recipient Interaction History Report - Recipients receive a print piece or an email, and then they open the email and interact with the website. These events are listed in this report for a single given recipient.

Report —a graphical or tabular representation of the Campaign's tracked data.

Report Editor —The UI property section that allows to define the type of report. It defines the report title, Population-Filter, grouping, and more.

Report Manager - a webpage that allows the user to re-organize the reports on the Report Tree. For example: move reports, rename reports, etc.

Service Level—the extent and the quality of the analytics service that service providers offer their customers. Marketing Console allows you to address the needs of different users, by choosing between two Service levels:

- Standard—entry-level reporting features, intended for most customers and Campaigns.
- Professional—a superior set of reporting features, including advanced, visually-rich reports, intended for premium-paying customers or high-profile Campaigns.

Service Provider —the company that owns the Marketing Console application and provides services to its customers.

Touchpoint—the marketing action of interacting with a recipient. A print-piece with a flyer and a letter would be a single Touchpoint, as it represents a single interaction with the recipient. Formally, a Touchpoint is a collection of events. It's a grouping of events that together makes sense for a Marketer. For example: "Follow-up" or "Thank You message", are Touchpoints that consist of a single event, whereas "email-interaction" maybe a Touchpoint that consists of two separate events, namely "sent-email"; "email-opened".

Usage: When filtering population, the Touchpoints are used to identify events in the event-condition and in the event-sequence-condition. There might be a follow-up email and a thank-you email (see john's sequence in the diagram above). When creating a condition that uses an event, it is not enough to specify the event type (i.e., email-sent) to identify the event, and therefore a Touchpoint is used to identify the "follow-up email-sent" as opposed to "thank you email-sent". Additionally, the filter defines the Analysis Timeframe (see definition above).

Tracking —a process of recording events from Campaigns. This includes recipient interaction with email and web, and Personal Effect activities such as print production, email production, etc.

Unique Page Visit Report —a view of the popularity of the page visits among the filtered population, within the analysis timeframe. For each page the reports shows the number of times it was visited. Each population individual is counted only once, even if they visited the same page multiple times.

Update Center - a centralized server managed by XMPie that allows users to fetch report upgrade online, and provides notification of upgrades.

Write Back —Marketing Console enables users to mark recipient records meeting specific criteria so recipients can be easily selected to receive certain follow-up communications within a Campaign. The Write Back feature also allows users to globally update any database field with new information based on report findings.

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