precisioncentral 7.0 RELEVANCE ENABLING TECHNOLOGIES

Data Director 7.0 User's Guide

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Introducing Data Director

In This Chapter

About Data Director

e-Dialog Data Director™ lets you manage your data through e-Dialog Precision Central™ for both mailings generated through e-Dialog Campaign Builder™, as well as through your Professional Services Account Team.

Data Director provides more precision by empowering you to upload and maintain your own Campaign Builder audiences. For mailings generated through your Account Team, the capabilities of Data Director allow you to update your Master Database easily.

e-Dialog's data management architecture is built specifically to give you the flexibility to execute Professional Service-generated campaigns through your e-Dialog Professional Service Account Team and self-service mailings using Campaign Builder, while leveraging a single, centralized, up-to-date data source for each.

Your Master Database, hosted by e-Dialog, is automatically updated with detailed click and conversion history for each recipient of each campaign, as well as with any profile updates or unsubscribe requests. Data Director allows you to easily add new data or new audience definitions to your Master Database, and to export audience lists for further analysis or segmentation.

Essential Concepts

To use Data Director, you should become familiar with the following concepts:

- **Audience**

  Audiences are also sometimes referred to as lists. An audience is a select group of people to whom you send your e-mail. You define an audience by specifying certain characteristics, for example women who live in Connecticut. Note that you can send mailings to multiple audiences. Audiences are subsets of your Master Database.

- **Master Database**

  The Master Database is where all of your data resides at e-Dialog. Any additions or modifications to data are made within the Master Database. The benefit to you is that information is maintained and controlled in one place. You do not have to worry about managing duplicate names.

- **Data**

  Data refers to the names and other attributes that are part of your Master Database or data file.

- **Field**

  A field is an attribute of your Master Database. Examples of fields are the last name, first name, e-mail address, or other attribute that describes people in your database. Fields are also sometimes referred to as Columns. Each field in the Master Database has a specific name.

- **Row**

  A row refers to any information associated with an individual in your data file or Master Database. Each individual has a row of dedicated information. Also sometimes referred to as records,

  The following figure shows 3 rows of individuals, which contain the information for that individual:

EMAIL	FIRSTNAME	LASTNAME	PREFMIME	PRODUCT
accountteam@e-dialog.com	Professional	Services	H	OFFER1
client@contact.com	Client	Contact	T	OFFER7
customer@domain.net	Joe	Consumer	A	OFFER4

- **Professional Service Generated Mailings**

  Any mailing that is launched by your Professional Services Account Team. Data Director lets you upload new data to your Professional Services Account Team for the mailing they are generating.

- **Campaign Builder Generated Mailings**

  Any mailing that is launched by you through e-Dialog Campaign Builder. Data Director lets you upload new audiences into Campaign Builder.

Data Director Wizard

The Data Director wizard guides you through the entire import and export processes. The wizard helps you create a new audience, assign permissions, and upload and import new data. There is also a wizard to help you export your data.

When you use the Wizard, you must complete certain information in the steps in order to progress to the following steps.

Depending on the permissions granted to your organizations to meet its needs, you may encounter all the options within the steps. This is geared to save you time while increasing your ease of use. For example, your organization may only grant you rights to only upload names to the Master Database. In this case, you do not have access to the "Complete Overwrite" option in step 4.

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while other are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

System Requirements

Precision Central 7.0 requires:

- ♦ Microsoft Windows or Apple Macintosh OS X*
- ♦ Adobe Flash Player 9.0.28 or newer

  Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.
- ♦ One of the following Web browsers:
  - § ***Internet Explorer 7*** (http://www.microsoft.com/downloads/) on Windows
  - § ***Firefox 3*** (http://www.mozilla.com/en-US/firefox/) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Starting Data Director

To start Data Director.

1. Log in to Precision Central.
2. Select **Data > Data Director.**

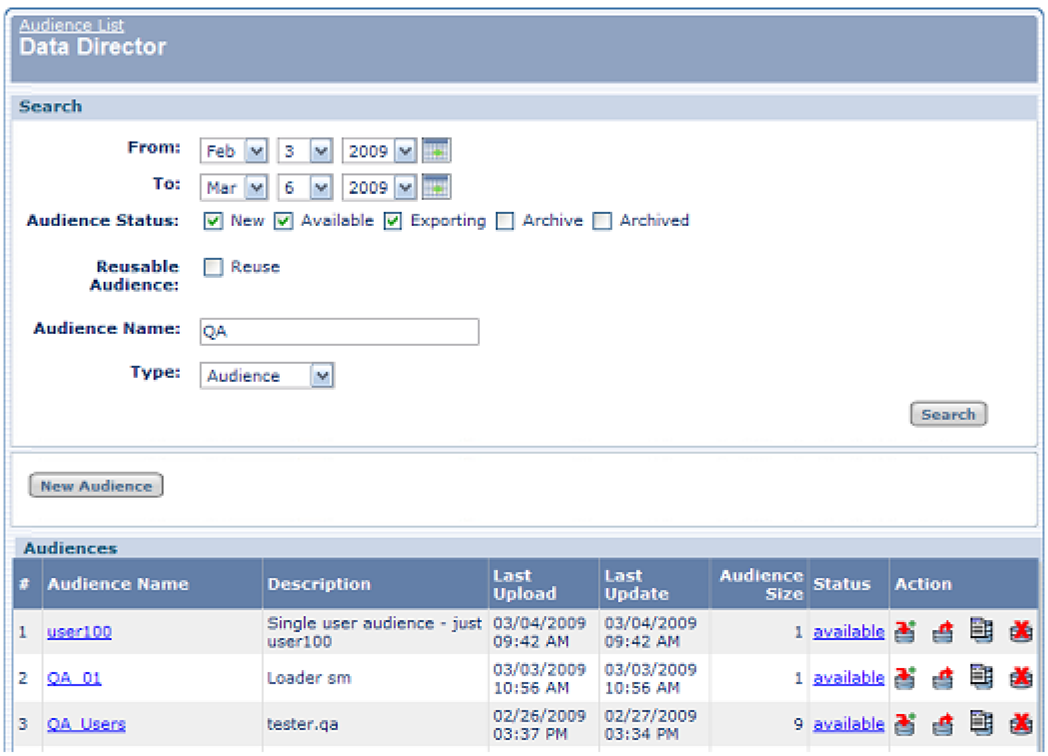
See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

Viewing the List of Audiences

In This Chapter

Viewing the Audience List

The first screen you see when you start Data Director is the Audience List.



The Audience List provides you with a bird's-eye view of your audiences. It displays information in table format about last update, last upload, status, and more.

Status

The status values include:

Status	Description
New	The audience has been created but has not gone through the importing process.

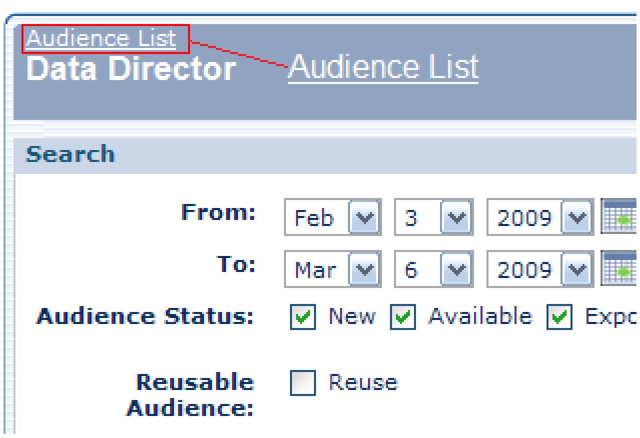
Importing	The Audience is in the process of importing into the Master Database. To check on the status of the import, click the Importing link in the Status column.
Exporting	The Audience is in the process of exporting. To check on the status of the export, click on the Exporting link in the Status column.
Available	The Audience is ready for mailing. It now appears for any user that is assigned access rights within Campaign Builder.

Actions

The actions include:

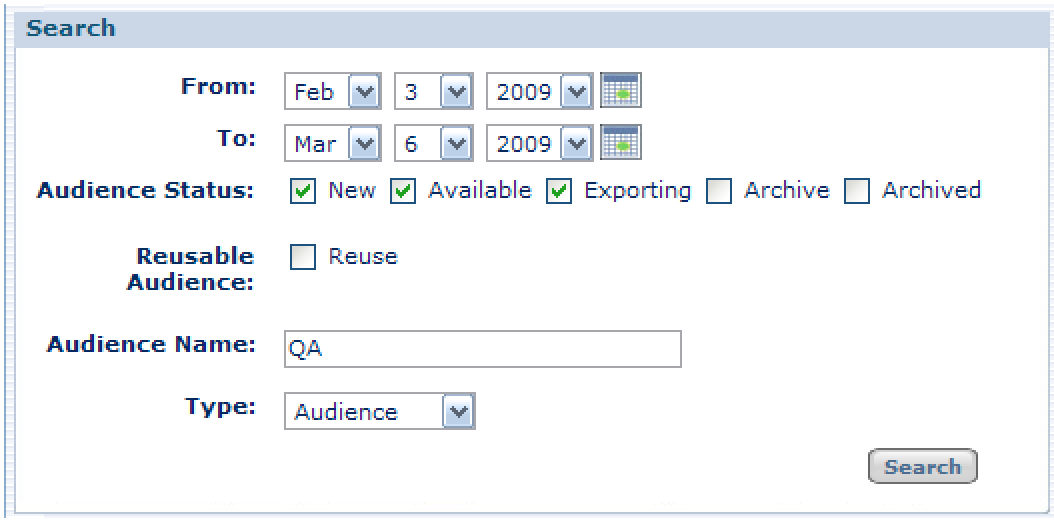
Action	Description
	Upload new names to the audience while updating existing records
	Export information from your database so you can update your own database or so that you can further query it within your own querying tool
	View and edit Audience properties including name and permissions.
	Permanently deletes the audience. After deleting, the audience is no longer available within Precision Central or any applications. **Note:** Deleting an audience only removes the audience's availability. Any data from that audience remains in the Master Database.

To return to the Audience List at any time, click Audience List.



Filtering the Audience List

You can filter the Audience List to display only the audiences you want to view. This is particularly helpful once you have created many Audiences.



You can use dates, audience status, whether an audience is reusable, audience name, and audience type to filter the audience list.

Filtering by date

The dates specify the period of time during which you have uploaded data in an audience. The default is 45 days. You can change the default by clicking **User Profile** in Precision Central.

To filter by date:

1 Select the From date by clicking the calendar.

2 Select the To date.

3 **Click Search.**

Filtering by Status

To filter by status:

1 Select the check boxes that describe the status of the audiences you want to include in the audience list.

2 Click **Search**.

Filtering by Name

Enter a portion of the name of the audiences to include in the list. The search is not case sensitive. When you enter a portion of a name, the list includes audiences whose name includes the text you enter. For example, if you enter **North**, the audience list includes the audiences **North**east Females, **North** Dakota Males, Teens from the **north**west, and so on.

To filter by audience name:

1 Enter the portion of the audience name to use.

2 Click **Search.**

Filtering by Type

You can limit the list to audience lists only or suppression lists only. Audiences specify recipients to whom you want to send an e-mail. Suppression lists specify recipients to whom you want to avoid sending an e-mail. To filter the audience list by type, select the type from the drop-down.

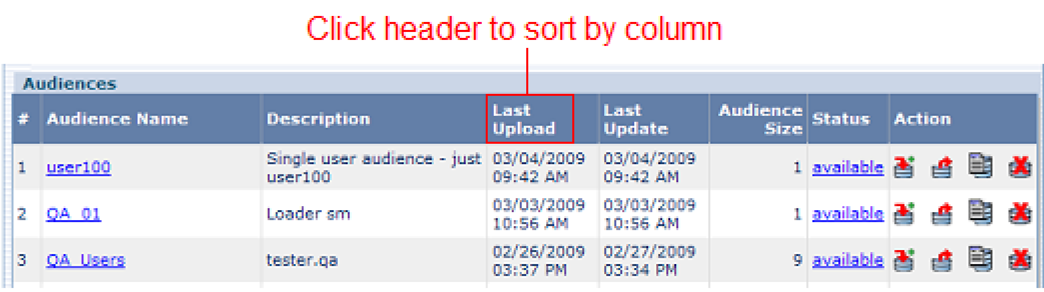
To filter by type:

1 Select Audience or Suppression from the drop-down.

2 Click **Search.**

Sorting the Audience List

You can sort the contents of the Audience List by clicking the column header. All columns with headers are sortable. Click the header text to sort the table by the data in that column. Click the header a second time to reverse-sort.



Working with Existing Audiences

In This Chapter

Updating an Audience

When you update an audience, you can:

- Add new names to an existing audience
- Update existing records

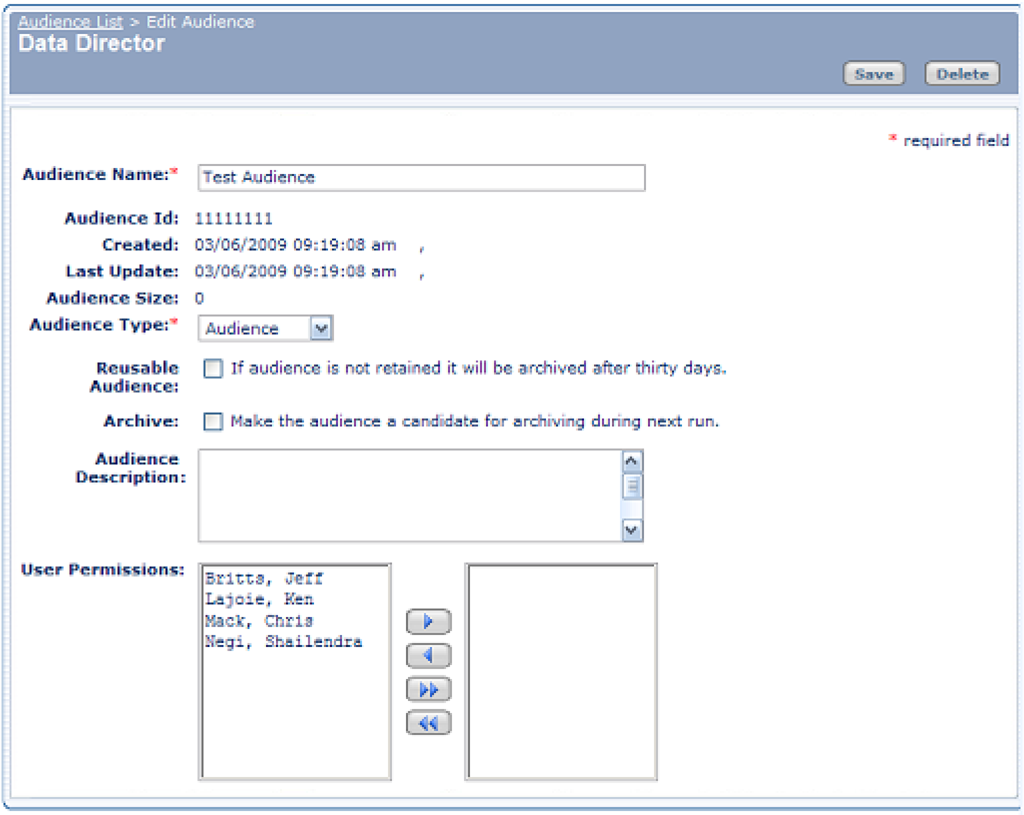
The process you follow involves the same steps as ***creating an audience*** (on page 19).

Updating Audience Properties

To edit the audience properties:

1 Go to the Audience List.

2 Click next to the audience whose properties you want to edit.



Audience properties you can edit include:

Property	**Description**
Audience Name	Name that identifies the audience. This name appears in Campaign Builder.
Audience Type	Either Audience or Suppression.
Reusable Audience	Whether you can use the audience more than once.
Archive	Whether to archive the audience (used primarily for one-time use audiences.
Audience Description	Description that helps you identify the Audience later on. This information appears in Campaign Builder. The description is especially important for administrative users who are creating audiences for other people within the organization. For Professional Service-generated mailings, the description helps give more information to your Professional Services Account Team.
User Permissions	**For administrators only (Do not touch)** Your designated administrator can assign permissions that determine who has access to which audiences. If this option is not available to you, the audience you create is

	only available to you for Campaign Builder mailings. This section does not apply to audiences uploaded for Professional Service-generated mailings.

Deleting an Audience

To delete an audience:

1 Go to the ***Audience List*** (on page 11).

2 Click next to the audience to delete.

Note: Deleting an audience only removes the audience's availability. Any data from that audience remains in the Master Database.

Creating an Audience

In This Chapter

Steps to Create an Audience

To create an audience, you:

1 Set up the audience by providing basic information.

2 Upload the data.

3 Map the uploaded data to the Master Database.

4 Confirm the import.

Step 1. Set Up the Audience

To set up an audience:

1 Enter the basic information about the audience, including:

- § Audience Name

  This is required. You should name the audience to reflect its purpose. This name appears in *Campaign Builder* to distinguish it from other audiences.

  Tip: When naming your audiences, be descriptive and use consistent naming conventions across mailings so that you can easily identify them in Campaign Builder.

- § Audience Description

  The description can contain more detail than the Audience Name, and is intended to help you identify the audience later on. This information appears in Campaign Builder. This is especially important for administrative users who are creating audiences for other people within the organization. For Professional Service-generated mailings, the description helps give more information to your Professional Services Account Team.

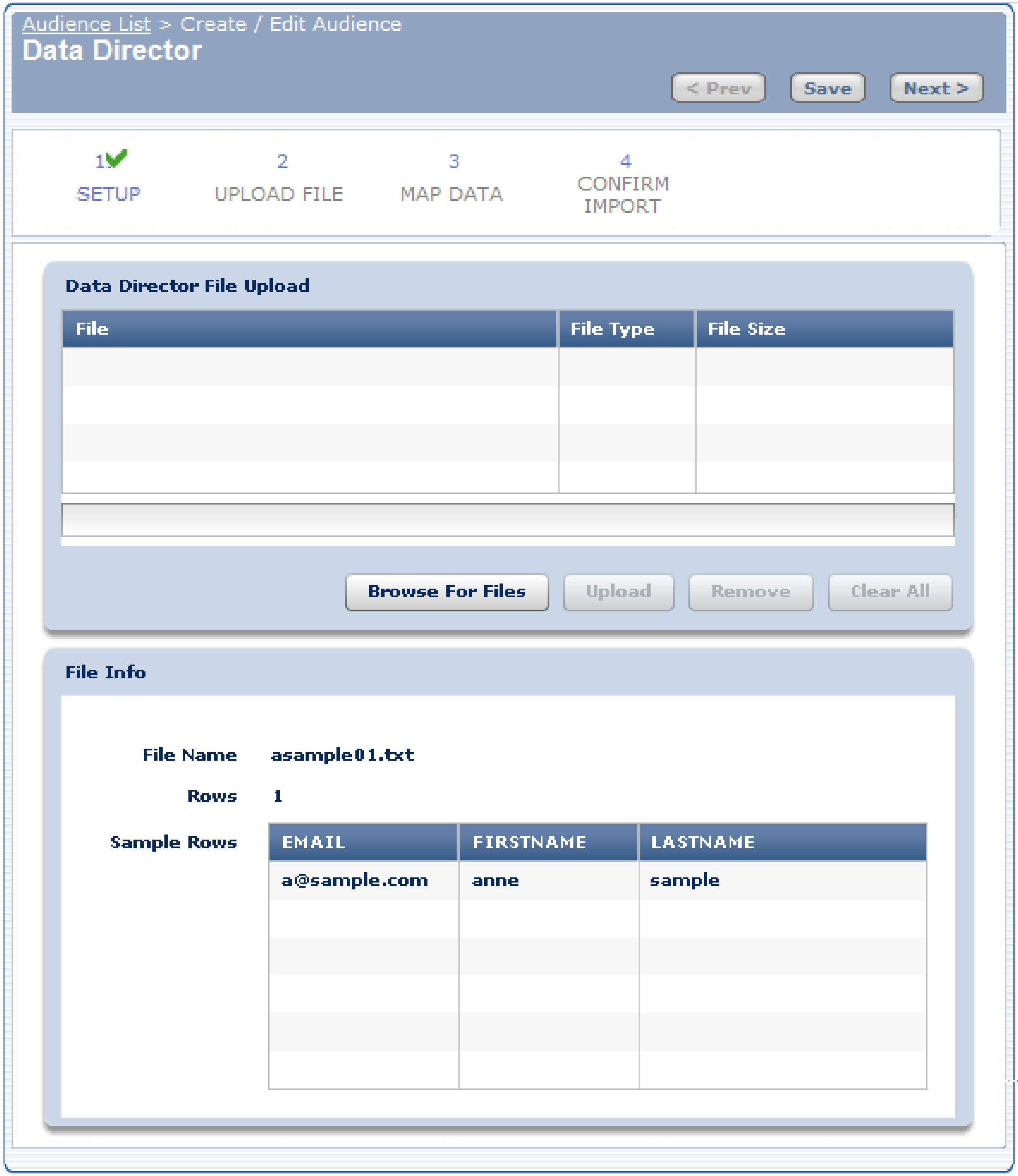
- § User Permissions

  Note: This is for Administrators only (Do not touch)

  Your designated Administrator can assign permissions that determine who has access to which audiences. If this option is not available to you, the audience you create is only available to you for Campaign Builder mailings. This section does not apply to audiences uploaded for Professional Service-generated mailings.

2 Click **Next.**

Step 2. Upload Audience Data



During this step, you upload the data file and preview its contents to ensure it is the correct file to import. The actual import is completed when you confirm the import in Step 4: Confirm the Import.

To upload the data file:

1 Prepare the data file.

Your data must be **clean** prior to uploading it with Data Director. 'Clean' means removing any inaccurate information. For example, some export programs add additional spaces after the field value such as LASTNAME. Remove any spaces that exist after a LASTNAME before uploading the data file. For example, change "Tuckerman " to be "Tuckerman". Failure to upload clean data may adversely affect your Master Database and mailings that are sent.

Ensure that your data file is in tab-delimited format. Data Director does not accept data files in any other format. To save a file in your database program as a tab delimited file, choose the Tab file type when saving/exporting your file from your corporate database.

2 Click **Browse For Files** and select a file to upload.

3 Click **Upload.**

The file is then uploaded to e-Dialog.

Once the upload is complete, you can view a sample of the data file with various file statistics to ensure it is the correct file. When you have ensure that it is the correct file, you can then proceed to the next step. If you see errors in the sample data or if the file is incorrect, click **Clear All** and then upload the correct file.

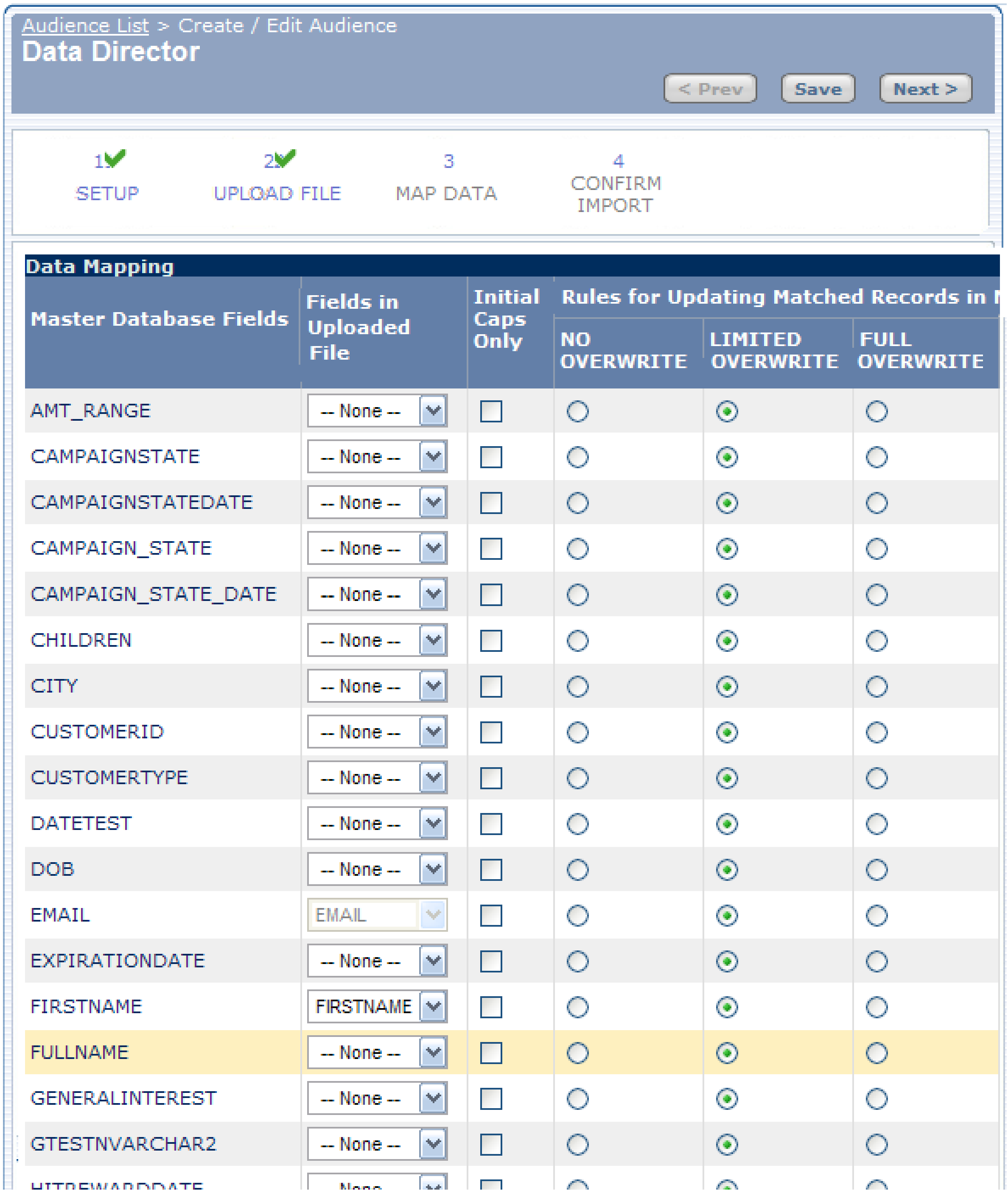
Important: Do not leave this page until the upload is complete. Leaving this page prevents the file from properly uploading.

4 Click **Next.**

Upload Times and Sizes

Upload times can vary greatly depending on your Internet connection and the number of rows and columns you are uploading. For this reason, it is recommended that you use a high speed connection for your uploads. As an estimate using a high-speed connection, you should experience upload times of approximately 1 minute per 10,000 names. Also, your results may vary, but it is not recommend that you upload data files that contain more than 200,000 names.

Step 3. Map Data to the Master Database



Mapping data to the Master Database determines how the uploaded data file is imported into your Master Database.

Note: Some of these options may not be available, depending on your user permissions and your company's standard defaults.

1 Select the field in the uploaded file that maps to the corresponding field in the Master Database.

Your Master Database fields are set up by your Professional Services Account Team. Any matching fields are automatically mapped to save you time. You may, however, change these mappings by choosing a different field in the drop-down list for that Master Database field.

Data Director automatically maps the EMAIL field in your uploaded file to the EMAIL field in your Master Database. You cannot map EMAIL to any other field in your uploaded file. e-Dialog uses the EMAIL field to manage duplicates and to maintain mailing history, such as click-throughs, mime type, and so on.

Tip: To map data faster and more reliably, ensure that your field names in your uploaded file are the same as your Master Database field names.

You can map a single field to multiple fields in the Master Database by selecting the same field from the drop-down list for numerous Master Database Fields. You might want to do this because you have some information in your uploaded file field that should be updated in several fields. For example, you might want to map a LASTPRODUCTPURCHASED field to LASTPRODUCTPURCHASED and FAVORITEPRODUCT. If a consumer purchased a digital camera, the digital camera becomes both the LASTPRODUCTPURCHASED and FAVORITEPRODUCT in the Master Database.

2 Specify whether the first letter of the data for each field is capitalized.

Many clients elect to have this option turned off, so you might not have this option available to you. Enabling Initial Caps (*Init Caps*) capitalizes the first letter of each word for that field. It also makes all other characters lower case. Initial Caps is used most frequently for the FIRSTNAME and LASTNAME fields to improve the look of names.

Init Caps Disabled	
FIRSTNAME	**LASTNAME**
joan	Wilson
BB	Tuckerman
Joe	wigglesworth
Mary	MacDonald

Init Caps Enabled	
FIRSTNAME	**EMAIL**
Joan	Wilson
Bb	Tuckerman
Joe	Wigglesworth
Mary	Macdonald

Note: Although enabling Init Caps may have a positive effect on most of your data, keep in mind that some data will be adversely affected For example, MacDonald becomes Macdonald.

3 Specify the updating rules.

You might not have this option available to you. The following options can be set on a global level or by field. Consult with your Professional Services Account Team for the default configuration.

Note: You cannot overwrite the EMAIL field because the EMAIL field serves as the duplication field finder.

§ No Overwrite

From a data overwrite perspective, this is the safest of the upload methods. Choosing this option adds new names to the Master Database as well as updating any empty fields. If the field is already populated with information, **Data Director** does not update it.

This option is ideal if you have a data file with recent new e-mail addresses, but which may contain outdated information on the other fields. You may want to create a new Audience while not worrying about updating existing information with outdated information.

In this example, existing data is not overwritten. Only new data appears in the updated master database. If the uploaded file does not contain a value for a piece of data, such as Karen's favorite color (red), the existing data remains the same.

Existing Master Database		
FIRST	**COLOR**	**EMAIL**
John	Green	john@sample.com
James		james@sample.com
Karen	Red	karen@sample.com

Uploaded File		
FIRST	**COLOR**	**EMAIL**
John	~~Blue~~	john@sample.com
James	Green	james@sample.com
Karen		karen@sample.com
Mark	Blue	mark@sample.com

Updated Master Database		
FIRST	**COLOR**	**EMAIL**
John	Green	john@sample.com
James	Green	james@sample.com
Karen	Red	karen@sample.com
Mark	Blue	mark@sample.com

Fields that can be overwritten

Fields that already have a value in the Master Database

Mark — Fields that are updated in the Master Database

§ Limited Overwrite

Lets you overwrite almost all data in the Master Database. The exception is that you cannot overwrite existing populated fields with null values.

This option is ideal if you want to update your database but may be missing certain existing values for some individuals. Rather than inserting blank information in the field, this option lets you keep the existing populated field intact.

Existing Master Database		
FIRST	**COLOR**	**EMAIL**
John	Green	john@sample.com
James		james@sample.com
Karen	Red	karen@sample.com

Uploaded File		
FIRST	**COLOR**	**EMAIL**
John	Blue	john@sample.com
James	Green	james@sample.com
Karen		karen@sample.com
Mark	Blue	mark@sample.com

Updated Master Database		
FIRST	**COLOR**	**EMAIL**
John	Blue	john@sample.com
James	Green	james@sample.com
Karen	Red	karen@sample.com
Mark	Blue	mark@sample.com

Fields that are different in the uploaded file and Master Database

Fields with a null value in the uploaded file

Mark — Fields that are updated in the Master Database

§ Full Overwrite

Lets you update any existing fields with the values in the uploaded file. This option is ideal if you are confident that the file you uploaded contains the most up-to-date information.

Existing Master Database		
FIRST	**COLOR**	**EMAIL**
John	Green	john@sample.com
James		james@sample.com
Karen	Red	karen@sample.com

Uploaded File		
FIRST	**COLOR**	**EMAIL**
John	Blue	john@sample.com
James	Green	james@sample.com
Karen		karen@sample.com
Mark	Blue	mark@sample.com

Updated Master Database		
FIRST	**COLOR**	**EMAIL**
John	Blue	john@sample.com
James	Green	james@sample.com
Karen		karen@sample.com
Mark	Blue	mark@sample.com

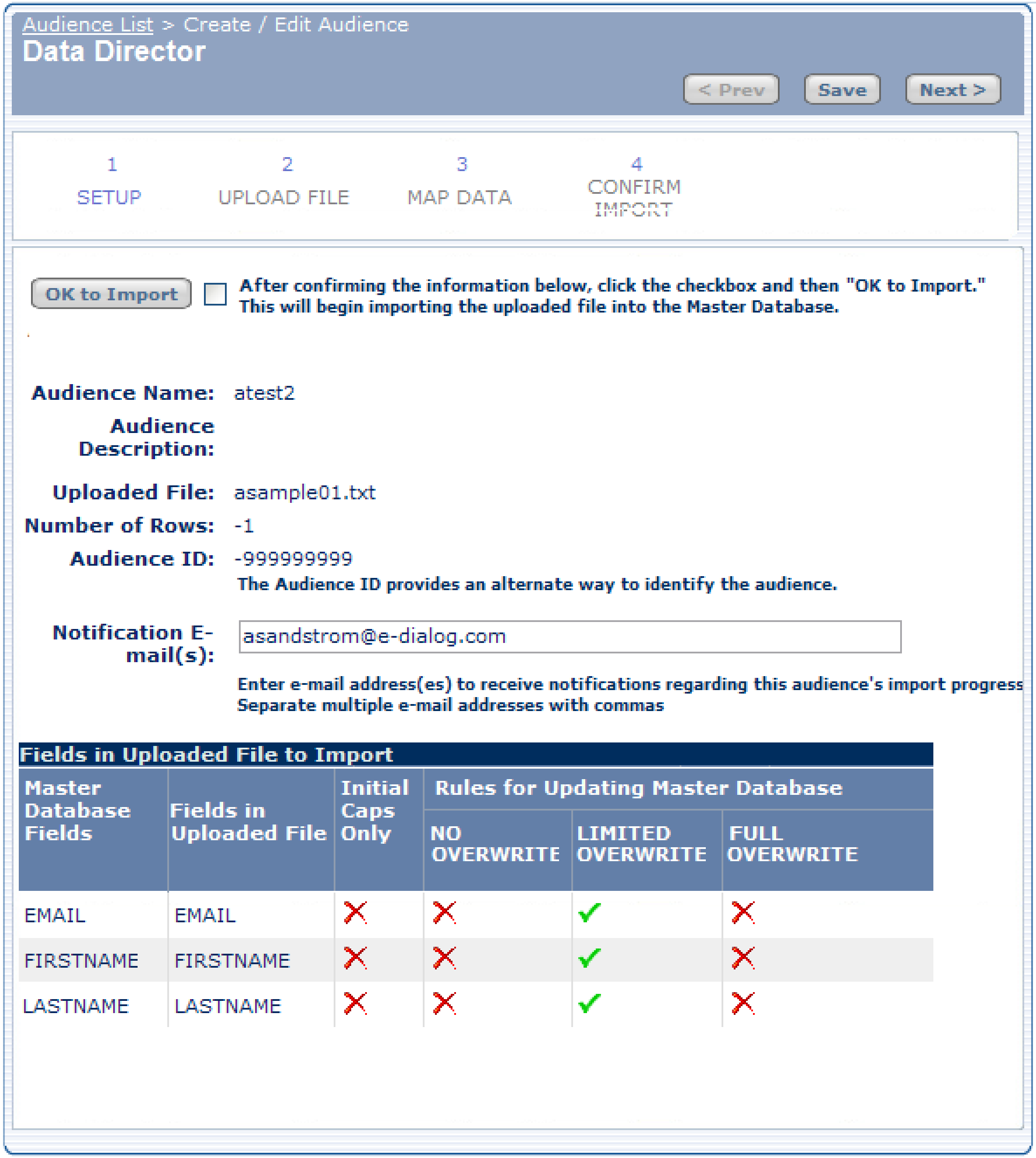
Fields that are different in the uploaded file and Master Database

Mark

Fields that are updated in the Master Database

4 Click **Next.**

Step 4. Confirm the Import



After reviewing all the details about your import, you confirm the import.

To confirm the import:

1 Ensure that the information in the Fields in Uploaded File To Import section is correct.

2 Check the check box next to the 'OK to Import' button.

3 Click **OK to Import.**

This begins the import process, which varies depending on the data file size.

Exporting an Audience

In This Chapter

Exporting the Audience

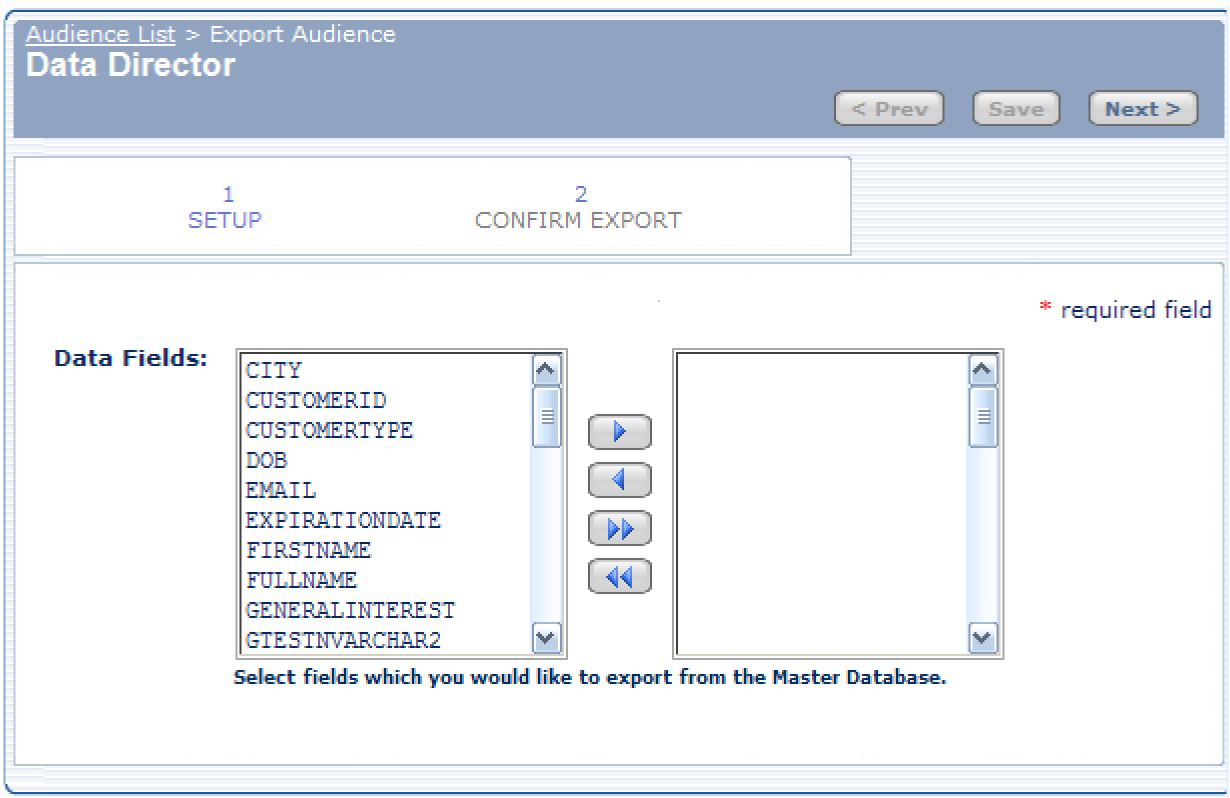
You can export audience data to a data file.

To export an audience:

1 Go to the ***Audience List*** (on page 11).

2 Click next to the audience whose data you want to export.

The Export Audience page appears.



3 Select the fields to include in the exported data file.

4 Click the appropriate button to move the fields from one column to the other.

- Include the selected field(s) in the export.

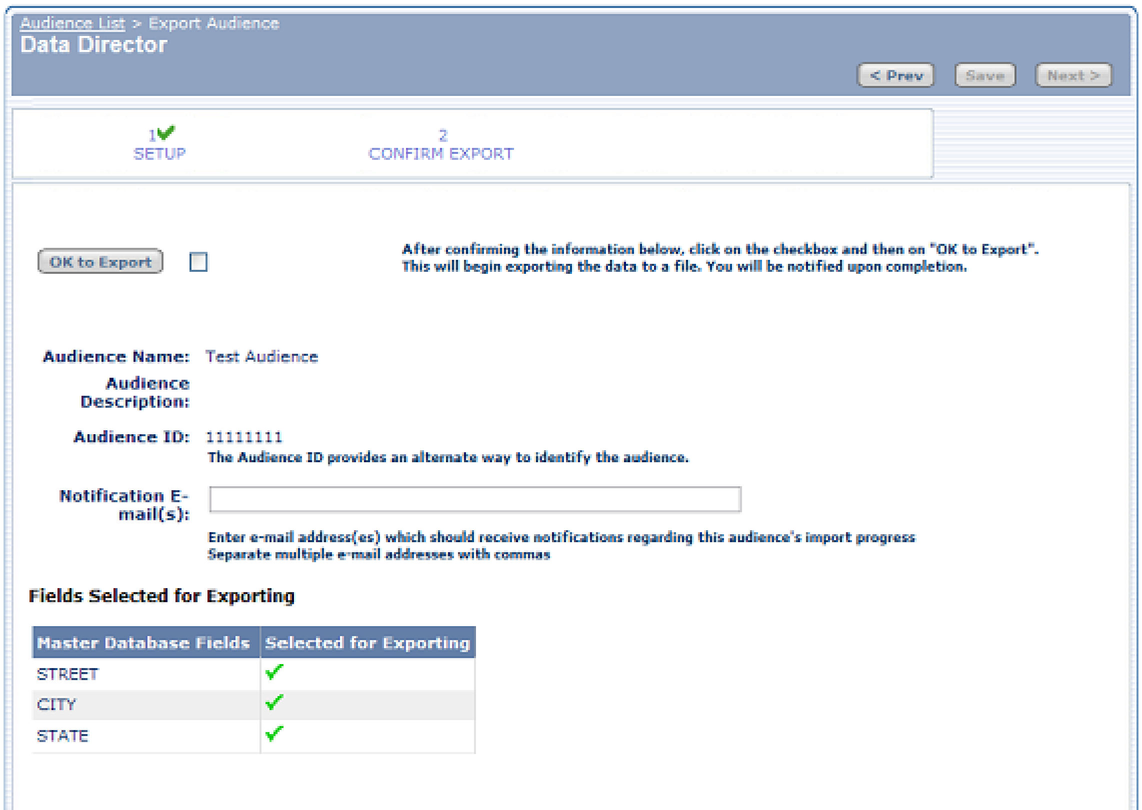
- Exclude the selected field(s) from the export.

- Include all fields in the export.

 - Exclude all fields from the export.

5 Click **Next.**

The Confirm Export page displays:



6 Ensure that the list of fields contains all of the fields you want to export.

7 Enter the e-mail address(es) to send notification to when the export is complete.

8 Check the checkbox next to the OK to Export button.

9 Click **OK to Export.**

When the export is complete, you receive an e-mail, sent to the address you specified in step 7. that contains a link to the text file that contains the exported content.

To download the exported file, do one of the following:

- Click the link, copy the contents, paste into a text editor or Microsoft Excel, and then save it.
- Right-click the link and select Save Target As, and then specify your desktop or network.

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