



Grid Publisher 7.0 User's Guide

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Contents

Copyright.....	3
Introducing Grid Publisher.....	7
About Grid Publisher	7
Customization for Your Organization	8
System Requirements	9
Starting Grid Publisher	9
Using Grid Publisher	11
How Grid Publishing Works.....	12
Process Overview.....	13
Using the Grid Publisher Tool.....	13
Previewing a Grid Object.....	14
Adding a Grid Object.....	15
Editing a Grid Object	17
Uploading Grid Data in Text Format.....	18
Uploading Grid Data in XML Format	19
Using Grids in Cells.....	23
Creating a Grid Object Symbol.....	23
Using Existing Symbols in a Grid	26
Deleting Symbols Used in a Grid.....	26
Index.....	27

Introducing Grid Publisher

In This Chapter

About Grid Publisher	7
Customization for Your Organization	8
System Requirements	9
Starting Grid Publisher	9

About Grid Publisher

e-Dialog Grid Publisher™ helps you manage the organization of complex and large-scale mailing setups. You can think of a grid as table-driven logic that is much easier to manage than Case symbols or the IF-THEN-ELSE logic in custom symbols, particularly when a large number of symbols and/or symbol values is involved.

Conceptually, a grid is a table of symbol values. Each column of the table represents a symbol. Each row contains string content or content object identifier values to merge into the content.

The first column of the grid is known as the key column and determines the set of values to merge into the e-mail for each recipient.

In the example below, the key column (G1STATE) contains the state in which the e-mail recipient resides. The value of G1STATE at mailing time determines the values of the other symbols (G1HOURS ... G1PROMOCD). The example grid is shown as a partial Excel spreadsheet for clarity.

G1STATE	G1HOURS	G1CUSTSERTEL	G1NUMSTORES	G1WKLYSPECIAL	G1BONUSBUCKS	G1PROMOCD
AL	7am - 8pm	205-111-2222	12	Toys	\$5	123a
AK	7am - 9pm	907-111-2222	7	Kids Shoes	\$10	123b
AZ	8am - 8pm	480-111-2222	5	Coats	\$5	123c
AR	8am - 9pm	479-111-2222	14	Shorts	\$10	123d
CA	9am - 8pm	209-111-2222	22	T-Shirts	\$5	123e
CO	9am - 9pm	303-111-2222	4	Hiking Boots	\$10	123f
CT	7am - 8pm	203-111-2222	14	Socks	\$5	123g
DE	7am - 9pm	302-111-2222	8	Ties	\$10	123h
DC	8am - 8pm	239-111-2222	5	Mens Shirts	\$5	123i
FL	8am - 9pm	229-111-2222	24	Tops	\$10	123j

The cell content for this example might look like the following:

Did you know that Newco has _G1NUMSTORES_ in your area? In fact, our stores are open from _G1HOURS_ each day. And to assist you with any customer service questions, please call our customer service hotline at _G1CUSTSERTEL_ anytime you like! Finally, as our gift to you, please use _G1BONUSBUCKS_ of complementary "Bonus Bucks" towards the purchase of any of this weeks clearance deals on _G1WKLYSPECIAL_ by bringing this e-mail into any of our _G1STATE_ stores or by calling a catalog representative at 1-800-123-4567. Cashier/Catalog, use promotion code _G1PROMOCD_.

An e-mail to a recipient from MA would appear as follows:



The value of the grid key (G1STATE in the example) for each e-mail recipient can be based on one of the following:

- ◆ a **specific symbol** within the cell; the value of the symbol is determined at mailing time from recipient data in the master database
- ◆ a **static user selected value**; this method is intended only for targeted audience lists.

For more information see *How Grid Publishing Works* (on page 12).

Note: Grid Publisher is not supported in Campaign Builder 6. If you open a cell that uses grid publishing, Campaign Builder 6 returns the message "This cell is only supported under Precision Central 7.0". Click OK to return to the campaign list.

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 Grid Publisher

To start Grid Publisher:

- 1 Log in to Precision Central.
- 2 Select **Utilities > Grid Publisher**.

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.

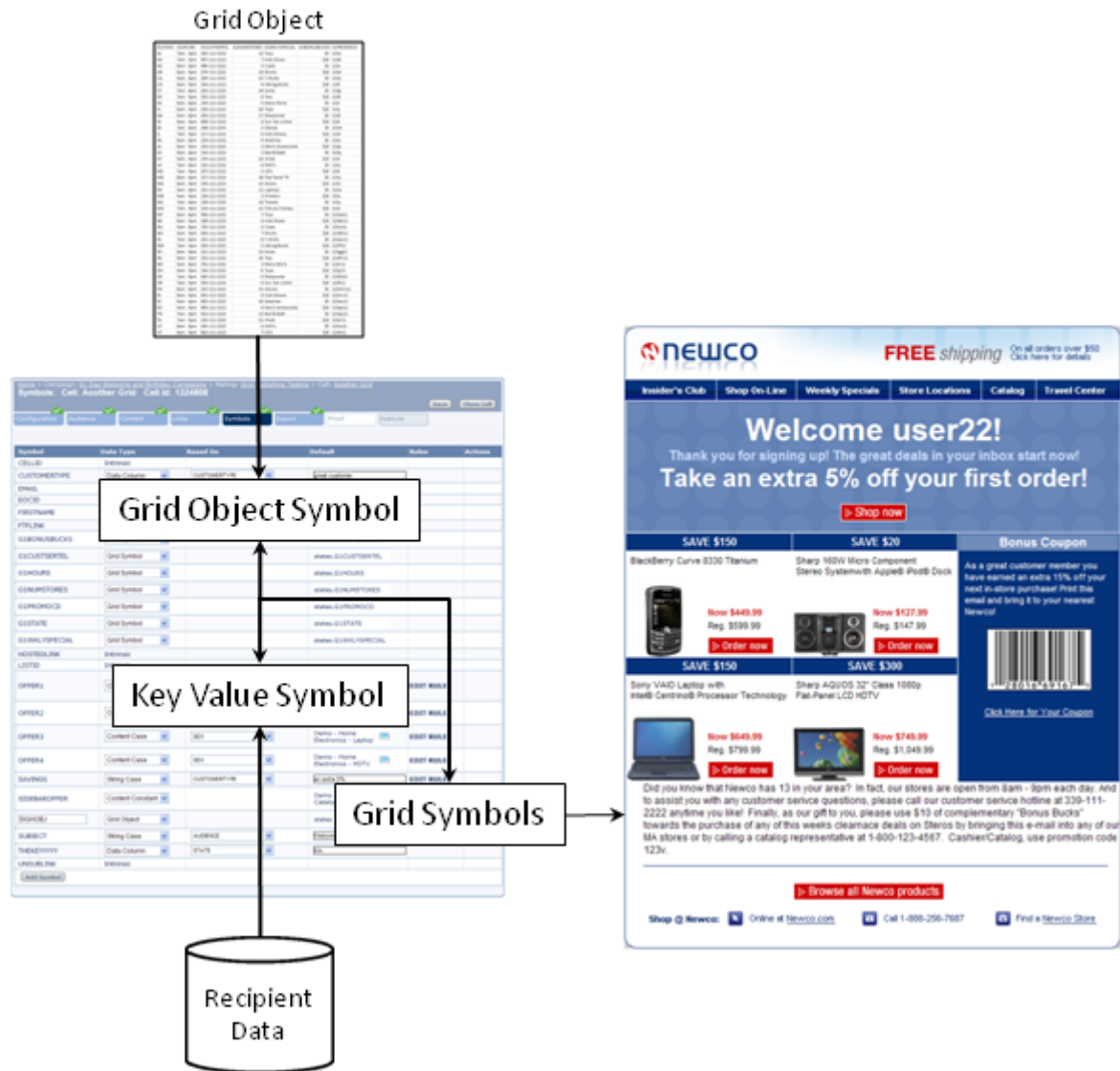
Using Grid Publisher

In This Chapter

- How Grid Publishing Works 12
- Process Overview..... 13
- Using the Grid Publisher Tool 13
- Previewing a Grid Object..... 14
- Adding a Grid Object..... 15
- Editing a Grid Object 17
- Uploading Grid Data in Text Format..... 18
- Uploading Grid Data in XML Format 19

How Grid Publishing Works

Grid Publishing is based on the elements shown in the illustration below:



Element	Description
Grid Object	Grid data is stored in grid objects within the database. The Grid Publisher tool manages grid objects.
Grid Object Symbol	To use a grid within a cell, you must create one symbol of type Grid Object whose purpose is to: ◆ bind a grid object to a cell ◆ specify where the grid key value comes from when the cell is mailed The grid object symbol itself is not intended to be used in the cell

	content (although you can do so if you have a specific need for it). Once the grid is working, you can safely delete the grid object symbol.
Key Value Symbol	When you create a Grid Object Symbol, you must specify how to determine the grid key value for each recipient at mailing time. Typically, the key value comes from a Data Column symbol. It also can be a static value.
Grid Symbols	The symbols whose values are controlled by the grid have the data type Grid Symbol and are used in the cell content.

Process Overview

In its simplest and most efficient form, the process of using Grid Publisher consists of two steps:

Create a Grid Object

The process of creating a grid object includes the following general steps:

- 1 Create a grid data file using an external tool such as a text editor, a spreadsheet, or a database application. The file format is a tab-delimited text file or an XML file.
- 2 Use **Grid Publisher** (see "Starting Grid Publisher" on page 9) to create a new grid object.
- 3 Upload the data file into the grid object.
- 4 Optionally restrict the grid object to a specific cell.

See **Adding a Grid Object** (on page 15) for detailed instructions.

Create a Grid Object Symbol

The process of creating a grid object symbol includes the following general steps.

- 1 Open a cell in Campaign Builder.
- 2 Create a new symbol using the data type Grid Object.
- 3 Bind the new Grid Object Symbol to a grid object.
- 4 Choose one of the two methods for determining the value of the grid key at mailing time.
 - § Fixed key value
 - § Key value symbol
- 5 If you choose to base the key value on another symbol, specify the name of that symbol. Campaign Builder creates it for you unless it already exists.

Campaign Builder automatically creates a Grid Symbol for each column of grid data unless the symbol already exists.

See **Creating a Grid Object Symbol** (on page 23) for detailed instructions.

Using the Grid Publisher Tool

When you start Grid Publisher, the initial screen displays a list of existing grid objects. You can:

Grid Publisher 7.0 User's Guide

- ◆ create new grid objects
- ◆ search for specific existing grid objects
- ◆ edit or preview existing grid objects

Grid Publisher

Grid Publisher

Search

Start Date:

Feb

20

2009

End Date:

Feb

26

2009

Grid ID:

Grid Name:

Search

Add Grid

View All Grids

Grid ID	Name	Last Updated	Action
61213135	Comma Grid	02/25/2009	Preview Edit
61211316	ForDelete	02/20/2009	Preview Edit
61213136	Test File	02/25/2009	Preview Edit
61213138	Test File	02/25/2009	Preview Edit
61213140	Test File	02/25/2009	Preview Edit
61213139	Test File	02/25/2009	Preview Edit
61213137	Test File	02/25/2009	Preview Edit
61213134	Test Grid 2/24/09	02/25/2009	Preview Edit
61213607	YingGrid	02/25/2009	Preview Edit

To filter the list of grid objects:

- Do any or all of the following:
 - § Select the **Start Date** and **End Date** to search for grids added within the specified time period.
 - § Specify the ID of the grid object.
 - § Specify the name of the grid object to find.

The search is case-insensitive and matches partial strings. For example, searching for AS returns names that include "as," such as "Master" and "Season." If the Name and ID conflict, the search result set is empty.
- Click **Search**.

To view all of the grid objects, click **View All Grids**.

Previewing a Grid Object

To see the contents of a grid object:

- Click [Preview](#) next to the grid object.

The preview window appears:

Grid Publisher

Search

Start Date: Feb 20 2009

End Date: Feb 26 2009

Grid ID:

Grid Name:

Search

Add Grid View All Grids

Grid ID	Name	Last Updated	Action
61213135	Comma Grid	02/25/2009	Preview Edit
61213136	ForDelete	02/20/2009	Preview Edit
61213136	Test File	02/25/2009	Preview Edit
61213138	Test File	02/25/2009	Preview Edit
61213140	Test File	03/25/2009	Preview Edit
61213139	Test File	02/25/2009	Preview Edit
61213137	Test File	02/25/2009	Preview Edit
61213134	Test File 02/24/09	02/25/2009	Preview Edit
61213607	YingGrid	02/25/2009	Preview Edit

states Preview (ID: 61224907)

G1STATE	G1HOURS	G1CUSTSERTEL	G1NUMSTORES	G1WKLYSPECIAL	G1BONUSBUCKS	G1PROMOCD
BL	7am - 8pm	205-111-2222	12	Toys \$5	123a	
AK	7am - 9pm	907-111-2222	7	Kids Shoes	\$10	123b
AZ	8am - 8pm	480-111-2222	5	Coats \$5	123c	
AR	8am - 9pm	479-111-2222	14	Shorts \$10	123d	
CA	9am - 8pm	209-111-2222	22	T-Shirts \$5	123e	
CO	9am - 9pm	303-111-2222	4	Hiking Boots \$10	123f	
CT	7am - 8pm	203-111-2222	14	Socks \$5	123g	
DE	7am - 9pm	302-111-2222	8	Ties \$10	123h	
DC	8am - 8pm	239-111-2222	5	Mens Shirts \$5	123i	
FL	8am - 9pm	229-111-2222	24	Tops \$10	123j	
GA	9am - 8pm	202-111-2222	17	Sleepwear \$5	123k	
HI	9am - 9pm	808-111-2222	4	Sun Tan Lotion \$10	123l	
ID	7am - 8pm	208-111-2222	2	Gloves \$5	123m	

Note: If you see invalid characters in the grid preview, save the grid data file with explicit UTF-8 encoding and reload it. Some text editors, such as Notepad, save text with ANSI encoding by default, even when the text contains non-ANSI characters.

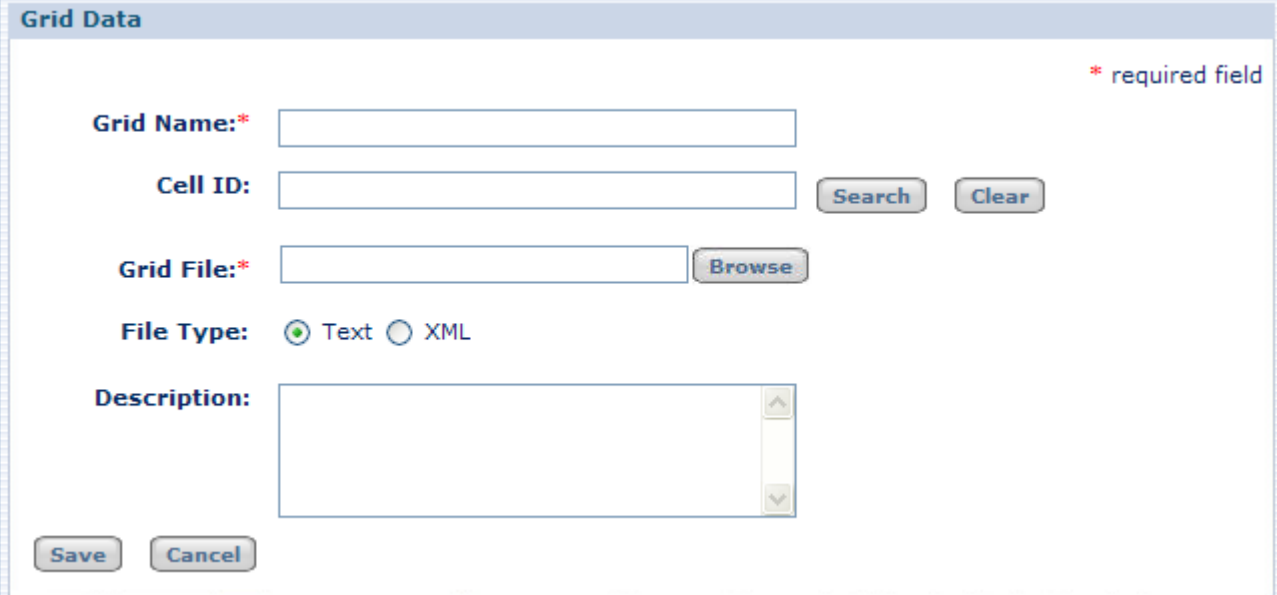
- Click the dialog's Close (X) button to return to the list of grid objects.

Adding a Grid Object

To add a new grid object:

- Create the text or XML file that contains the grid data.
- While viewing the list of grid objects, click Add Grid.

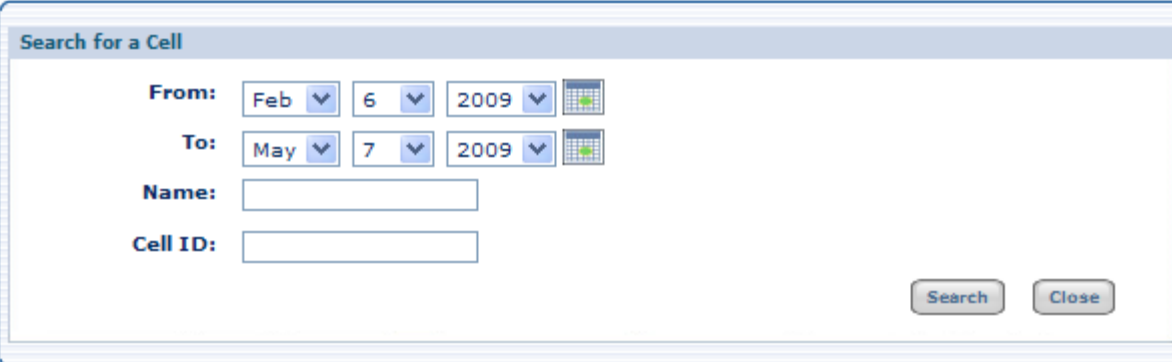
The Grid Data dialog appears:



The Grid Data dialog box is titled "Grid Data" and includes a legend in the top right corner indicating that an asterisk (*) denotes a required field. The dialog contains the following fields and controls:

- Grid Name:** A text input field with an asterisk indicating it is required.
- Cell ID:** A text input field.
- Grid File:** A text input field with an asterisk indicating it is required, followed by a "Browse" button.
- File Type:** Two radio buttons labeled "Text" (selected) and "XML".
- Description:** A large text area with up and down arrow buttons on the right side.
- Buttons:** "Save" and "Cancel" buttons are located at the bottom left.

- 3 Enter the grid name.
- 4 (optional) Specify the ID of the cell to which you want to restrict use of the grid.
A grid that is restricted to a particular cell can be used in that cell and clones of that cell. You can use an unrestricted grid in any cell.
 - a) To find a cell, click **Search**.



The Search for a Cell dialog box is titled "Search for a Cell" and includes the following fields and controls:

- From:** Three dropdown menus for month (Feb), day (6), and year (2009), followed by a calendar icon.
- To:** Three dropdown menus for month (May), day (7), and year (2009), followed by a calendar icon.
- Name:** A text input field.
- Cell ID:** A text input field.
- Buttons:** "Search" and "Close" buttons are located at the bottom right.

- b) To search for cells added within a certain time period, specify a the **From** and **To** date.
 - c) To search for cells by name, enter the name of the cell.
The search is case-insensitive and matches partial strings. For example, searching for AS returns names that include "as," such as "Master" and "Season."
 - d) To search for a specific cell, enter the cell ID.
If the Name and ID conflict, the search result set is empty.
 - e) Click **Search**.
 - f) Click **Close** to return to the Grid Data dialog.
- 5 Enter the full path and filename of the grid data file. Alternatively, click **Browse** to find the file.
- 6 Select the format of the grid data file, either **Text** or **XML**.

For more information, see *Uploading Grid Data in Text Format* (on page 18) and *Uploading Grid Data in XML Format* (on page 19).

7 Enter a description of the grid.

8 Click **Save**.

Grid Publisher saves the grid as an object in the database.

Editing a Grid Object

To edit a grid object:

1 When viewing the list of grid objects, click [Edit](#) next the grid to modify.

The screenshot shows a web form titled "Grid Data" with a light blue header. In the top right corner, there is a red asterisk followed by the text "* required field". The form contains the following fields and controls:

- Grid Name:** A text input field containing the word "test".
- Cell ID:** An empty text input field.
- Grid File:** An empty text input field with a "Browse" button to its right.
- File Type:** Two radio buttons labeled "Text" (which is selected) and "XML".
- Description:** A large text area with a vertical scrollbar on the right side.

At the bottom of the form, there are three buttons: "Save", "Cancel", and "Preview".

2 Specify the grid name, cell ID, grid file, file type, and description as described in *Adding a Grid Object* (on page 15).

3 (optional) Click **Preview** to see the grid contents.

4 (optional) Click **Delete** to delete the grid object.

You can only delete a grid object that is not currently bound to a symbol.

5 Click **Save**.

To return to the list of grid objects without changing this grid object, click **Cancel**.

Uploading Grid Data in Text Format

Grid Publisher accepts industry-standard, tab-delimited text files. For example:

```
KEY → TEAM → CITY → COUNTRY¶
001 → Aardvarks → A → AA¶
002 → Elephants → E → EE¶
003 → Gazelles → G → GG¶
004 → Monkeys → M → MM¶
005 → Wombats → W → WW¶
006 → Zebras → Z → ZZ¶
```

where an arrow (→) indicates a tab character and a paragraph (¶) indicates a line terminator.

- ◆ The first row in the file is a header that contains symbol names except that the first column (in this case "KEY") does not correspond to a symbol and can be any alphanumeric string.
- ◆ The second and subsequent rows are data values: string values or content object identifiers.
- ◆ Optionally enclose multiple-word phrases in double quote (") characters. This is not required but very helpful for readability.
- ◆ To include a double quote (") character in the string data, precede it with a backslash (\) character.
For example:
this is how to include a double quote: \"
- ◆ To include a backslash (\) character in the string data, precede it with a backslash (\) character.
this is how to include a backslash: \\
- ◆ Use a standard character encoding such as UTF-8.

Note: If you see invalid characters in the grid, save the grid data file with explicit UTF-8 encoding and reload it. Some text editors, such as Notepad, save text with ANSI encoding by default, even when the text contains non-ANSI characters.

Creating the Grid Data File

You can use an external tool such as a text editor, a spreadsheet, or a database application to create the grid data file. For example, you can create the following spreadsheet in Microsoft Excel 2007:

KEY	TEAM	CITY	COUNTRY
001	Aardvarks	A	AA
002	Elephants	E	EE
003	Gazelles	G	GG
004	Monkeys	M	MM
005	Wombats	W	WW
006	Zebras	Z	ZZ

To save the spreadsheet as a tab-delimited text file:

- 1 Select **Office** (button) > **Save As** > **Other Formats**
- 2 Save as type: Text (Tab delimited) (*.txt)

File name:

Save as type:

Tab-delimited text files saved by Excel 2007 do not enclose multiple-word phrases in double quote characters but tab-delimited text files saved by Excel 2003 do.

Uploading Grid Data in XML Format

Grid Publisher accepts XML files that comply with the simplified XML schema definition shown in this section. Some tag attributes exist only for backwards compatibility with older grid implementations.

XML declaration

The XML declaration must be as shown:

```
<?xml version="1.0" encoding="UTF-8"?>
```

<SP> Tag

Provide one <SP> tag that contains one or more <ROW> tags.

```
<SP app-type="publish-grid" row-count="6" column-count="4" key-list="KEY">
  <ROW></ROW>
  ⋮
</SP>
```

app-type	String	Must be "publish-grid" as shown.
row-count	Integer	The number of rows in the grid. (There is no column header row in an XML grid file.)
column-count	Integer	The number of columns in the grid.
key-list	String	The name of the key value column.

<ROW> Tag

Provide a <ROW> tag for each key value (row of data) in the grid. Each <ROW> tag contains two or more <column-name> tags, one of which is the key column.

```
<ROW rownum="1" KEY-1="001" KEY-1-COLUMN="KEY">
  <column-name></column-name>
  ⋮
</ROW>
```

rownum	Integer	The ordinal number of the row, counting from one.
KEY-1	String	The value of the key value column.
KEY-1-COLUMN	String	The name of the key value column.

<column-name> Tag

Within each <ROW> tag, provide a <column-name> tag for each column in the grid.

```
<column-name>value</column-name>
⋮
```

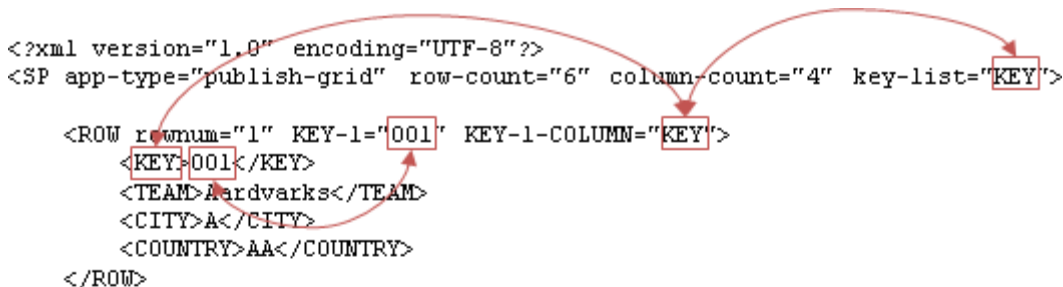
Grid Publisher 7.0 User's Guide

<i>value</i>	String	The key value (first tag only) or the value to substitute for the symbol at mailing time.
--------------	--------	---

- ◆ The name of the first `<column-name>` tag can be any alphanumeric string but must match the KEY-1-COLUMN attribute of the `<ROW>` tag.
- ◆ The value of the first `<column-name>` tag must match the KEY-1 attribute of the `<ROW>` tag.

Example

This example uses the same data as the example in *Uploading Grid Data in Text Format* (on page 18).



```
<?xml version="1.0" encoding="UTF-8"?>
<SP app-type="publish-grid" row-count="6" column-count="4" key-list="KEY">

  <ROW rownum="1" KEY-1="001" KEY-1-COLUMN="KEY">
    <KEY>001</KEY>
    <TEAM>Hardvarks</TEAM>
    <CITY>A</CITY>
    <COUNTRY>AA</COUNTRY>
  </ROW>

  <ROW rownum="2" KEY-1="002" KEY-1-COLUMN="KEY">
    <KEY>002</KEY>
    <TEAM>Elephants</TEAM>
    <CITY>E</CITY>
    <COUNTRY>EE</COUNTRY>
  </ROW>

  <ROW rownum="3" KEY-1="003" KEY-1-COLUMN="KEY">
    <KEY>003</KEY>
    <TEAM>Gazelles</TEAM>
    <CITY>G</CITY>
    <COUNTRY>GG</COUNTRY>
  </ROW>

  <ROW rownum="4" KEY-1="004" KEY-1-COLUMN="KEY">
    <KEY>004</KEY>
    <TEAM>Monkeys</TEAM>
    <CITY>M</CITY>
    <COUNTRY>MM</COUNTRY>
  </ROW>

  <ROW rownum="5" KEY-1="005" KEY-1-COLUMN="KEY">
    <KEY>005</KEY>
    <TEAM>Wombats</TEAM>
    <CITY>W</CITY>
    <COUNTRY>WW</COUNTRY>
  </ROW>

  <ROW rownum="6" KEY-1="006" KEY-1-COLUMN="KEY">
    <KEY>006</KEY>
    <TEAM>Zebras</TEAM>
    <CITY>Z</CITY>
    <COUNTRY>ZZ</COUNTRY>
  </ROW>

</SP>
```


Using Grids in Cells

In This Chapter

Creating a Grid Object Symbol.....	23
Using Existing Symbols in a Grid	26
Deleting Symbols Used in a Grid.....	26

Creating a Grid Object Symbol

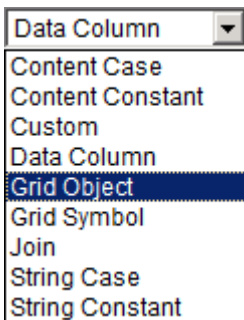
Creating a grid object symbol automatically creates the other symbols needed by the grid: grid symbols to use in the cell content and a key value symbol (if you choose to use one). See **Using Existing Symbols in a Grid** (on page 26) if any of the symbols needed by the grid already exist in the cell.

To configure a grid:

- 1 Start Campaign Builder.

Note: To use a grid in a cell, you must use Campaign Builder 7.0.

- 2 Create or edit the cell that you want to contain the grid.
- 3 Go to the **Symbols** tab.
- 4 Create a new symbol of type **Grid Object**.



The Grid Object symbol is not intended to be used in the cell content (although it can be if you have a specific need to do so). It can be safely deleted after the grid is working.

- 5 **Save** the symbols tab.

- 6 Click  in the **Default** column of the grid object symbol

Symbol	Data Type	Based On	Default	Rules	Actions
CELLID	Intrinsic				
EOCID	Intrinsic				
GRIDOBJECT	Grid Object		None Selected 		DELETE
Add Symbol					

Note: Although the column name is Default, a grid object symbol does not use it to set a default value in the usual sense. The purpose is to bind the cell to a specific grid object. There is no non-default case.

- 7 Click the **name of the grid object** that you want to associate with the cell.



When you have selected a grid object, the panel changes as shown below:



- 8 **Choose the source of the grid key value** used at mailing time for each e-mail recipient. There are two options:

§ **Enter a New Key Symbol** on which to base the key value. Campaign Builder creates the symbol for you unless it already exists.

Do not use one of the column names listed at the bottom of the panel. To do so causes a namespace conflict.

§ **Select a Static Key Value** for all recipients of this cell from the dropdown list. This method is intended for targeted audience lists. Using the states grid example, you could create a special cell with an audience list consisting only of recipients in a specific state. In that case, you would select a static key value representing the targeted state.

- 9 Click **Submit**. There may be a delay as Campaign Builder automatically creates symbols for you. When the process is complete, the symbol tab looks something like the one shown below.

Symbol	Data Type	Based On	Default	Rules	Actions
CELLID	Intrinsic				
EOCID	Intrinsic				
G1BONUSBUCKS	Grid Symbol ▼		states.G1BONUSBUCKS		DELETE
G1CUSTSERTEL	Grid Symbol ▼		states.G1CUSTSERTEL		DELETE
G1HOURS	Grid Symbol ▼		states.G1HOURS		DELETE
G1NUMSTORES	Grid Symbol ▼		states.G1NUMSTORES		DELETE
G1PROMOCD	Grid Symbol ▼		states.G1PROMOCD		DELETE
G1STATE	Grid Symbol ▼		states.G1STATE		DELETE
G1WKLYSPECIAL	Grid Symbol ▼		states.G1WKLYSPECIAL		DELETE
GRIDOBJECT	Grid Object ▼		states 		DELETE
KEYVALUE	Data Column ▼	AUDIENCE ▼			
Add Symbol					

- § Each column in the grid object now has a corresponding symbol of type **Grid Symbol**. In this example, the columns are G1BONUSBUCKS ... G1WKLYSPECIAL. You can delete grid symbols that are not used in the cell.
- § Each grid symbol displays the name of the grid followed by a period and the name of the grid data column in the Default column. This mapping of symbol name to grid column allows you to change the symbol name without changing the associated data column. For example, the grid symbol G1HOURS displays "states.G1HOURS" in the Default column. If you rename the grid symbol G1HOURS to some other name such as STORE_HOURS, the value in the Default column does not change.
- § The **Grid Object Symbol** displays the name of the grid object in the Default column.
- § If you specified a symbol name as the source of the grid key value, Campaign Builder automatically creates a **key value symbol** of that name (KEYVALUE in the example). The default symbol data type is Data Column and the symbol is based on AUDIENCE. You can change the data type to any other symbol data type except possibly a custom symbol.

10 If you are using a key value symbol, the default data type is Data Column:

- a) Select the **Based On** data column.
- b) Enter a **Default value** for the new key value symbol.

If you use another symbol data type to provide the grid key value, set the symbol column values as you normally would.

11 Click **Save**.

Note: This step is very important. The grid and grid value symbols are not written to the database until you save the Symbols tab.

12 Once you have saved the symbol tab, you can use the grid symbols in your cell content as shown in **About Grid Publisher** (on page 7).

Using Existing Symbols in a Grid

Grid Object Symbols

You can use an existing symbol as a grid object symbol by changing its data type. However, if the existing symbol is used in the cell content, this practice is not recommended.

Grid Symbols

Symbols that have the same name as a grid data file column can already exist in your cell and can be used in the content or elsewhere in the cell. In that case, Campaign Builder changes the data type of these existing symbols to Grid Symbol.

Note: Do not manually change the data type of a Grid Symbol. To do is not supported and may cause the grid to malfunction.

Key Value Symbols

You can use an existing symbol as the grid key value symbol. Campaign Builder associates the symbol with the grid and does not change the symbol in any way. However, once the grid is working, you cannot delete the key value symbol.

Deleting Symbols Used in a Grid

Grid Object Symbols

Once a grid is working, deleting the Grid Object Symbol is safe. The grid continues to work as before.

Grid Symbols

Deleting a grid symbol works exactly the same way as any other symbol. If the symbol is used somewhere in the cell, it cannot be deleted. Otherwise, it is safe to delete.

Key Value Symbols

You cannot delete the key value symbol as long as the grid object symbol exists. If you delete the grid object symbol, you can delete the key value symbol but this causes the grid to malfunction.

Index

A

About Grid Publisher • 7, 25
Adding a Grid Object • 13, 15, 17

C

Copyright • 3
Creating a Grid Object Symbol • 13, 23
Customization for Your Organization • 8

D

Deleting Symbols Used in a Grid • 26

E

Editing a Grid Object • 17

H

How Grid Publishing Works • 8, 12

I

Introducing Grid Publisher • 7

P

Previewing a Grid Object • 14
Process Overview • 13

S

Starting Grid Publisher • 9, 13
System Requirements • 9

U

Uploading Grid Data in Text Format • 17, 18, 21
Uploading Grid Data in XML Format • 17, 19
Using Existing Symbols in a Grid • 23, 26
Using Grid Publisher • 11
Using Grids in Cells • 23
Using the Grid Publisher Tool • 13