precisioncentral 7.0 RELEVANCE ENABLING TECHNOLOGIES

Insight Builder 7.0 User's Guide

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Contents

Introducing Insight Builder

In This Chapter

About Insight Builder

e-Dialog Insight Builder™ lets you create queries to generate audience and suppression lists.

Insight Builder lets you:

- Access and manage your organization's customer data
- Analyze and segment customer information at a granular level
- Perform advanced queries of your e-mail campaign results, profile information, and previous audiences

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 Insight Builder

To start Insight Builder:

1 Log in to Precision Central.

2 Select **Data > Insight Builder.**

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.

Essential Concepts

In This Chapter

What is a Query?

A query is a way to get a list of customers who meet certain criteria. In a simple query, you might ask for all of your customers who meet one criterion, for example, all customers who are female. Generally, however, you combine criteria to further refine the results.

For example, a query with multiple criteria might generate a list of customers who are between the ages of 23 and 40, earn more than $150,000 a year, are Frequent Clickers, and did not click on the Monthly Newsletter mailing.

Combining Multiple Criteria

When you specify multiple criteria in a query, you can combine them in the following ways:

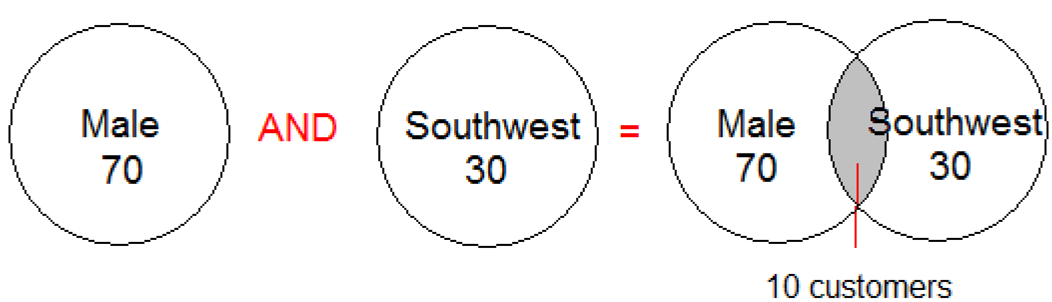
- Both A AND B must be true
- Either A OR B must be true

You use Boolean operators (AND and OR) to specify the relationship between the criteria.

Using the AND Operator

Use the AND operator when you want two conditions to be true. For example, to get a list of male customers from the southwest, you specify the following query:

```
Gender: Male AND Region: Southwest
```

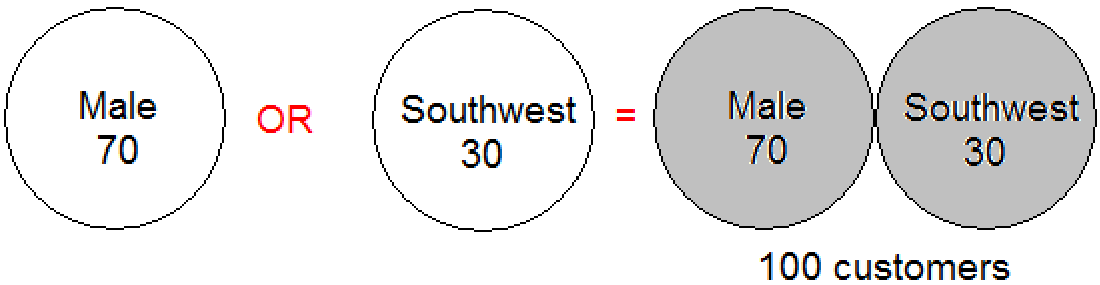


In this case, there are 70 males; there are 30 customers who live in the southwest, but only 10 males who live in the southwest.

Using the OR Operator

Use the OR operator when you want either of two conditions to be true. For example, to get a list of all the customers who are either male or from the southwest, you specify the following query:

Gender: Male OR Region: Southwest



In this case, there are 70 males; there are 30 customers who live in the southwest. 100 customers are either male or live in the southwest.

Note: Because 10 customers are both male and from the southwest, as indicated in the AND example, the audience list would contain 90 unique recipients after "de-duping" the 10 recipients who meet both criteria.

Viewing Saved Queries

In This Chapter

Listing Saved Queries

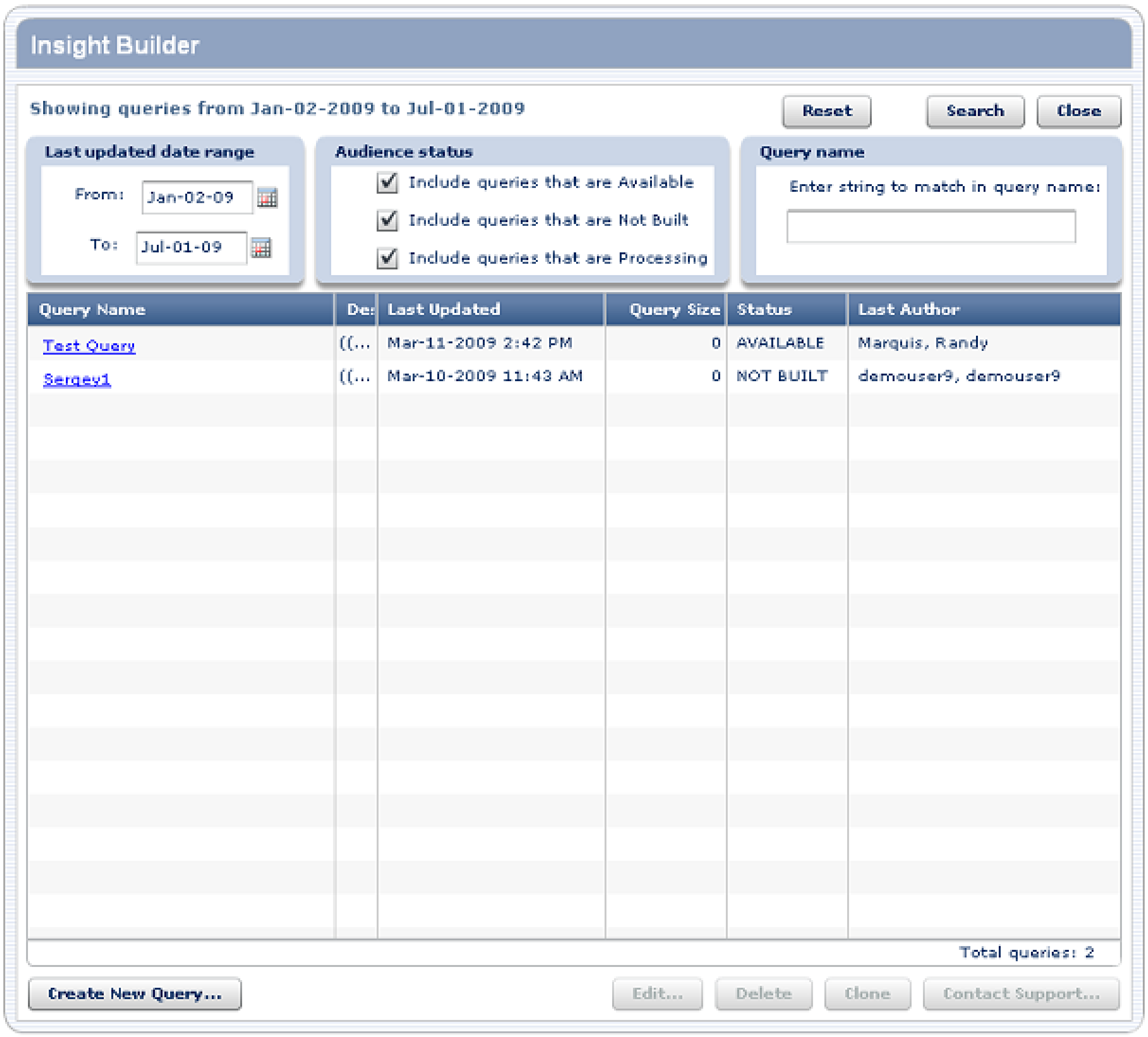
Query Name	Description	Last Updated	Query Size	Status	Last Author
Mike Test	((Gender ...	Jan-14-2009	2,290	AVAILABLE	demo, demo
01/16/09 Test Second	((Campai...	Jan-16-2009	3	AVAILABLE	demo, demo
Nikki Test	((Browsed...	Jan-21-2009	0	NOT BUILT	demo, demo
090227 Lauren Test	((Multi-Us...	Feb-27-2009	3,772	AVAILABLE	demo, demo
testbuildaudience-modif	((Campaign...	Mar-30-2009	3	AVAILABLE	demo, demo
bugtest2-12	((Campaign...	Feb-12-2009	3	NOT BUILT	demo, demo
bugtest-255	((Campaign...	Feb-19-2009	1	NOT BUILT	demo, demo
test excludes only	((Gender ...	Feb-26-2009	1,011,972	NOT BUILT	demo, demo
Karen Test	((Campaign...	Jan-12-2009	0	NOT BUILT	demo, demo
bugtest	((Campaign...	Feb-06-2009	0	NOT BUILT	demo, demo
ktest1-29	((Campaign...	Jan-29-2009	0	NOT BUILT	demo, demo
testTwo-mod4	((Multi-Us...	Mar-31-2009	12	AVAILABLE	demo, demo
STACY TESTQUERY 090	((Multi-Use ...	Mar-20-2009	13	NOT BUILT	demo, demo
STACY DEMO TEST2	((Multi-Use ...	Mar-20-2009	7	NOT BUILT	demo, demo
Tims Test Query	My Description	Mar-10-2009	6,001	NOT BUILT	demo, demo
jeff preview test	((Gender IN...	Mar-10-2009	1,323	NOT BUILT	demo, demo
jefftest090331	((Gender ...	Apr-01-2009	1,327	AVAILABLE	demo, demo
01/16/09 Test Second	((Campai...	Jan-16-2009	3	AVAILABLE	demo, demo

Total queries: 18

The list of queries:

- Provides a complete list of your queries
- lets you filter queries by date, audience status, and name
- Provides high-level data about saved queries
- Enables you to access, edit, clone or delete saved queries
- Lets you contact e-Dialog Technical Support if you encounter a problem with an audience

Filtering the List of Saved Queries



You can control which queries are displayed by doing any of the following:

- Setting date ranges
- Using audience status filters
- Typing specific query names

By default, Insight Builder lists all queries updated within the last 45 days, for every status. To change your default settings, go to the Insight Builder Preferences section of the User Profile area within Precision Central.

Insight Builder uses all of the criteria you specify to filter the list of queries. For example, you can search for available queries that were most recently updated in the past week, whose name contains the word "test."

To filter the list of queries, click **Search.**

Filtering by date

Click the calendar icons to define the range of dates for which to display queries, and then click **Search**. Insight Builder searches for queries that were most recently modified within that range of dates.

Filtering by audience status

Use the check boxes to define the queries with the audience status you want to display and then click **Search.** Audience Status is only applicable when you have chosen to build an audience from the Query Creation Screen. The status is a definition of the audience's phase of development in Data Director. Once it is available in Data Director, the audience is available to use in e-mail campaigns.

Audience Status	Description
Available	Audience has been built and is available in Data Director.
Not Built	Query has been saved, but the audience has not been built.
Processing	Audience is still being built and is not yet available in Data Director.

It can take approximately 30 to 45 minutes to build an audience. The time depends on the complexity of the query and the size of the audience. Once it is built an audience becomes available in Data Director.

Filtering by query name

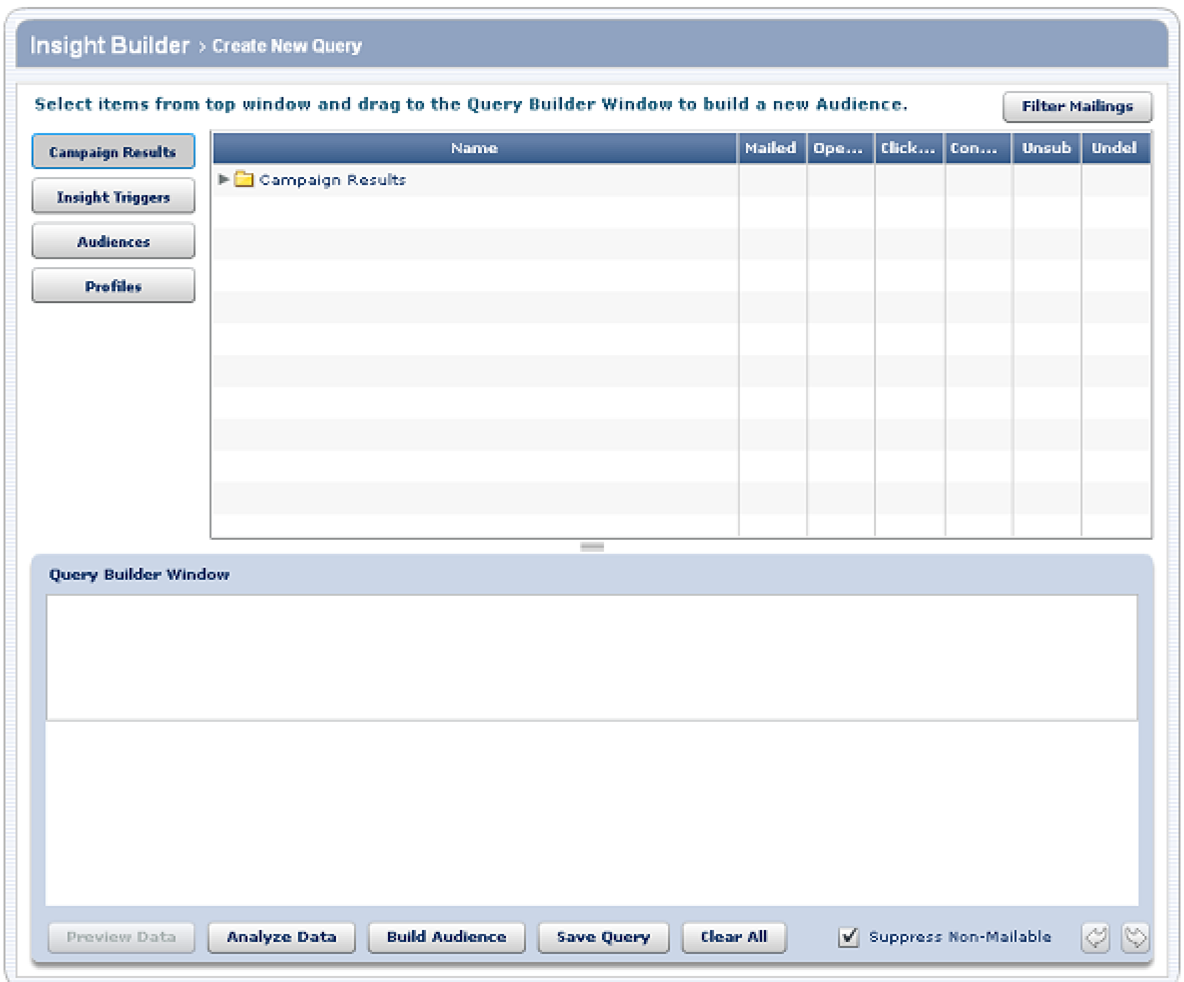
You can specify all or part of the name of a query. Insight Builder finds every query whose name contains the text you enter, regardless of case or position in the name. For example, if you enter "Split," Insight Builder finds queries named "January **split** audience 30 percent," "**Split** Test," and "**SPLIT** AUDIENCE 50." Enter the portion of or entire query name and click **Search.**

Creating a Query

In This Chapter

Creating a Query

To create a query, click **Create New Query** while viewing the list of queries. You can also click the query name to edit a saved query.



When you create a query, you can:

- Get access to all data types: historical campaign results from eReports, insight triggers, previously created audiences, and profile data

  To see when profile data was most recently updated, hover over the name to see a tooltip that provides the date.
- Create advanced queries on available data using a simple drag-and-drop process

  Available data depends on your permissions and your shared data with e-Dialog.
- Build an audience from a query
- Save queries
- Compute rapid query counts

You create a query by selecting segments of customers, known as fields, from the four data types: Campaign Results, Insight Triggers, Audiences, and Profiles. Each field is defined by a common criterion. For example, Gender is a field.

A field that accepts multiple values usually appears with (MV) next to it. For example a customer could have multiple favorite sports teams. By contrast, a single value field can accept only one value, such as male or female for gender. Occasionally, a field accepts multiple values, but does not appear with an (MV).

Note: All data types are updated every 24 hours. When you use On Demand Refresh in eReports, the refreshed data appears in the Campaign Results. You can also refresh all lists or profiles or a single list manually.

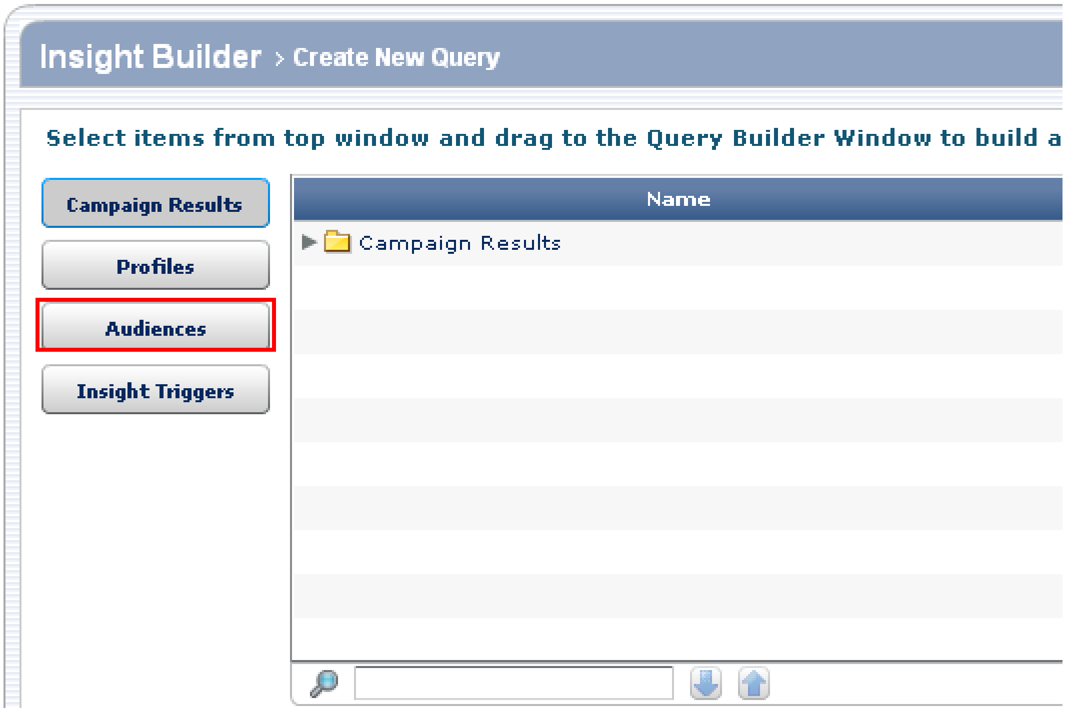
Searching for Audiences

When you create a query in Insight Builder, you can now quickly search for audiences by name or list ID.

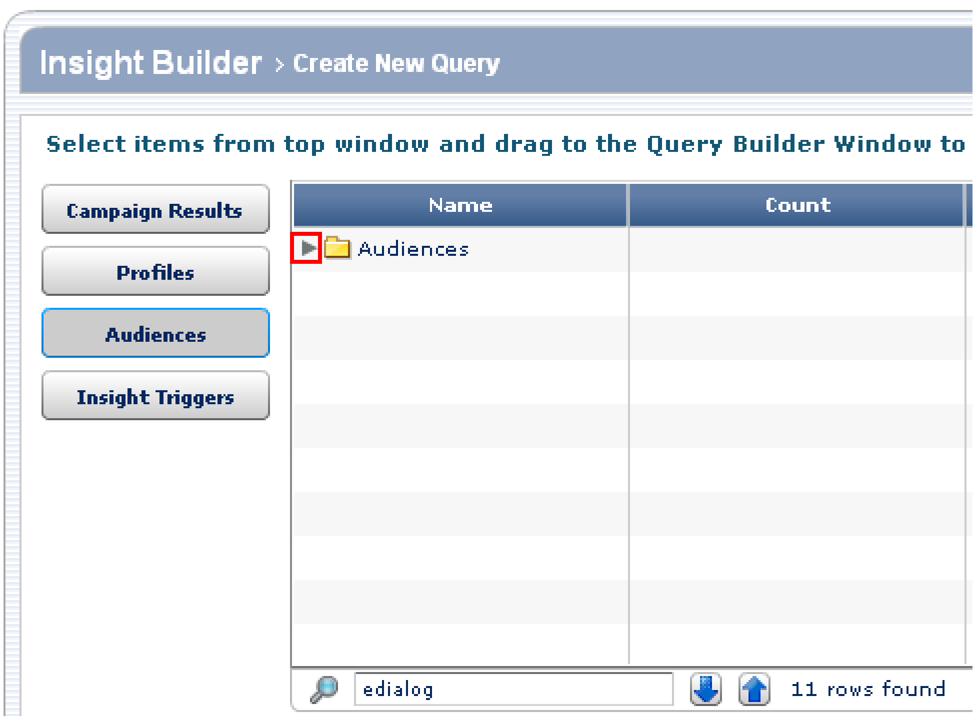
To search for audiences:

1. Start Insight Builder.
2. Click **Create New Query.**

3 Click **Audiences.**



4 Expand the Audiences folder, and then expand the subfolder in which you want to find an audience.

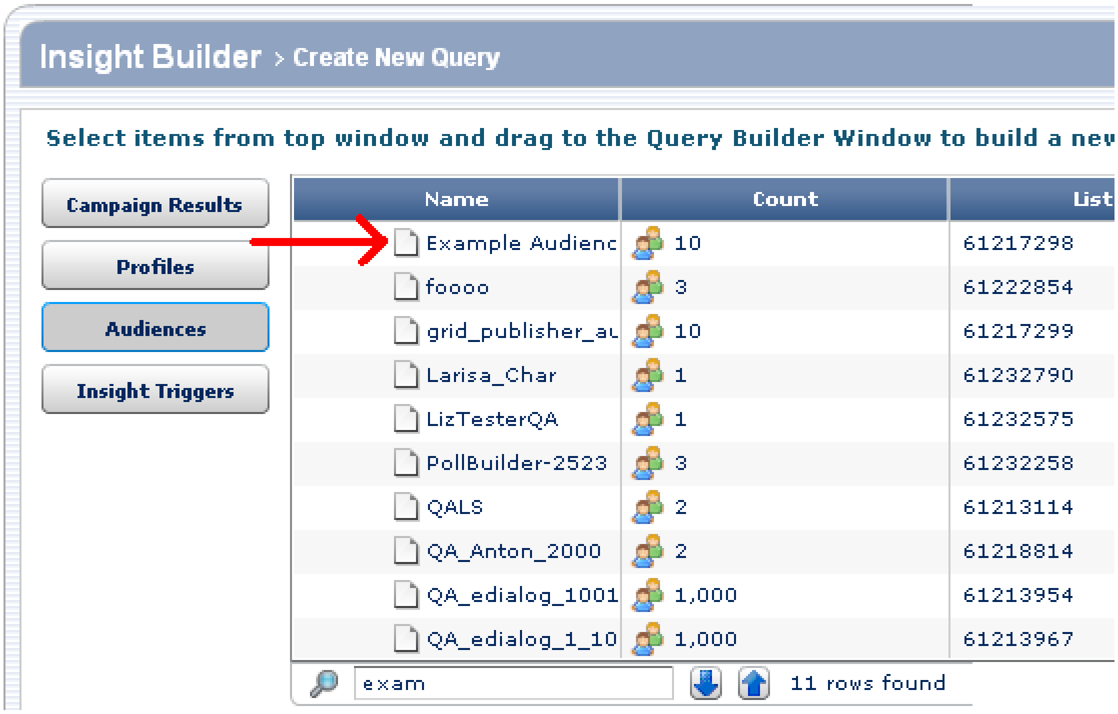


5 Enter a portion of the audience Name or List ID that you want to find in the text box.

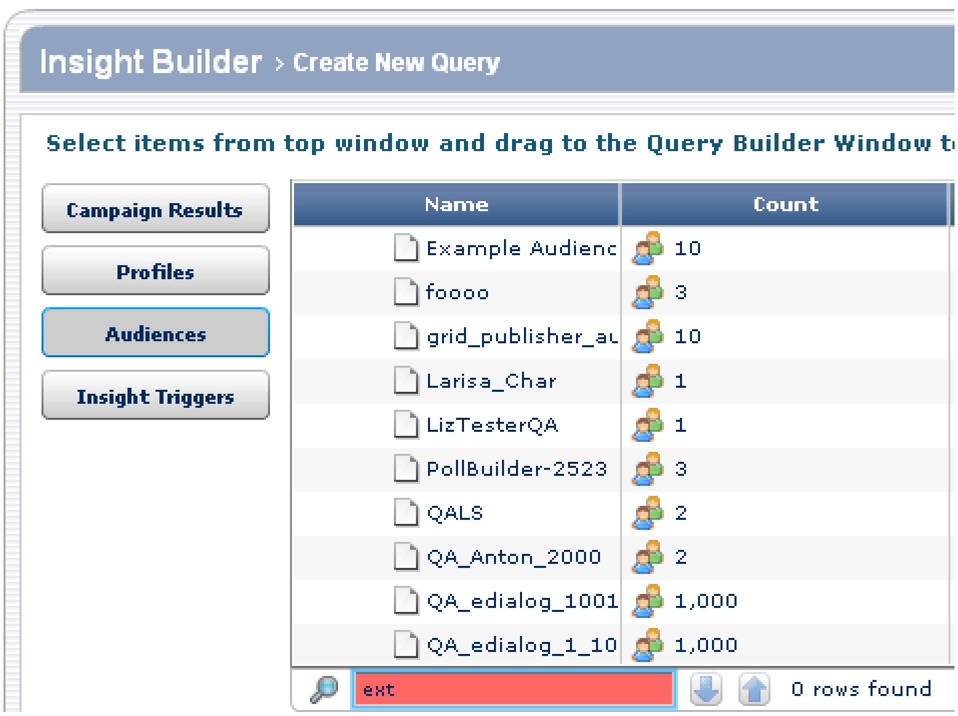
The search is case-insensitive.

Insight Builder displays the number of audiences that match the criteria.

The first audience whose name or list ID contains the text you entered appears at the top of the list of audiences.



If no audiences match the criteria, the text box is shaded in red.



Note: The list of audiences continues to display *all* the audiences. The search scrolls the list to display the first audience that meets the search criteria at the top. When you click the down arrow to display the next audience that meets the criteria, the search scrolls the list again, to display the next audiences that meets the criteria at the top. The list scrolls continuously, so that if you reach the end of the list and then click the down arrow, it scrolls to display the first item in the list that matches the criteria at the top of the list.

6 To see the next audience that contains the text you entered, click the down arrow.

To see the previous audience that meets the criteria, click the up arrow.

Building a Query

You build a query by specifying the criteria to use to narrow the customer list. You specify the criteria by selecting fields from the available data types and arranging those fields logically.

To build a query:

1 ***Select an available field.*** (on page 20)

Fields are organized in data types.

2 ***Drag the count to the Query Builder Window.*** (on page 24)

The arrangement of fields in the Query Builder Window reflects their logical relationship.

3 ***Refine the query*** (on page 26).

4 ***View the results*** (on page 26) of the query.

5 Save the query.

Click **Save** to save the query. After you do so, the query appears in the list of saved queries.

Selecting an Available Field

To specify criteria, you select a field from the available data types.

The data types are:

Data Type	Description
Campaign Results (on page 21)	Historical e-mail campaign results from eReports, available at the mailing, cell, audience, and link levels. Available response criteria include: Mailed, Opened, Clicked, Converted, Unsubscribed, and Undeliverable.
Insight Triggers	Customers to whom an insight trigger mailing was sent, by bucket.
Audiences	Audiences that you have created in the past, which are all available as criteria for additional queries. Each audience is listed with a unique ID for support purposes.
Profiles (on page 23)	Customizable information that has been collected via an e-Dialog hosted enrollment application or imported from other data sources. If you have chosen not to host an enrollment form with e-Dialog or to import data through other means, Domain and Non-mailable information are still available.

Campaign Results

Campaign Results data can be filtered similarly to the Saved Queries Screen (or similarly to the Filter feature in eReports). Click the calendar icon at the top of the Query Creation Screen to set the date range of mailings to display. Insight Builder displays 10 mailings at a time. For longer time periods, click Previous 10 and Next 10 to scroll through the list of all of the mailings.

The following illustrates the levels of campaign results:

Mailing (M)				A series of messages sent as part of a common communication initiative
	Cell (C)			Within a Mailing, a group of messages with common content (or, in the case of a custom published mailing, a group of messages with common content rules)
		Audience (A)		Within a Mailing or Cell, a group of recipients that have been pre-defined as members of the same Audience for analysis purposes
			Link (L)	A clickable URL within an e-mail which enables the message recipient to access a web page with more information

Response criteria indicate the number of recipients who received, opened, clicked a link in, or unsubscribed in an e-mail.

Response Criteria	**Description**
Mailed (Net Mailed)	The number of unique recipients to whom a mailing is successfully delivered. At the Link level, the Net Delivered number is greater than at the Mailing, Cell, or Audience level if the same link appears more than once within a message.
Opened (HTML Only)	The number of unique recipients who opened the message (HTML version only). Use this measure with some caution for the following reasons: It is only possible to track whether an e-mail was opened if the e-mail is in HTML format or other graphically rich format, but not plain text If the "preview window" is enabled in the recipient's e-mail client, previewed e-mails cannot be distinguished from e-mails that are actually opened. Both previewed and opened e-mails are counted as opened messages.

Clicked (Unique Clicks)	The number of recipients who clicked through on at least one URL link within the e-mail (excluding the unsubscribe link). At the Link level this is the number of recipients who clicked on the specific link.
Converted	The number of recipients who converted on the mailing. A conversion occurs when an e-mail recipient clicks through on the message and ultimately reaches the conversion web page, which has been pre-selected as a goal for the mailing. The conversion page is typically a confirmation page presented after a purchase, registration, or information request is completed. This data is available only for mailings that use e-Dialog ConversionTrack™. **Note:** Not available at the Link level.
Unsubs (Unsubscribe)	The number of people who unsubscribed from the mailing. **Note:** Not available at the Link level.
Undel (Undeliverable)	The number of target recipients to whom the e-mail was not successfully delivered. Undeliverables are primarily the result of: ♦ inactive e-mail addresses ♦ problems with or unavailability of the recipient's e-mail server **Note:** Not available at the Link level. Undeliverable rules include: ♦ *If an undelivered message is returned, and it is viewed as a "permanent" or "hard" undelivered response (for example, the domain does not exist), there are no further attempts to deliver that message* ♦ *If a "temporary" or "soft" undelivered response is returned (for example, there is a "Mailbox Full" message), e-Dialog makes a series of automated attempts to deliver the message for up to a 24-hour period. If, after that period, the message still does not reach the recipient, the address is assigned an undelivered status logged for that particular mailing.* ♦ *Permanent undelivereds are marked in the e-Dialog database as such after a single undelivered response message and are not included in future mailings.* ♦ *Temporary undelivereds are included in future*

	mailings until 3 consecutive undelivereds, across 3 separate mailings in a greater than 14 day period occur. When this occurs, the address is marked undeliverable and is removed from future mailings.

Profiles

Within the Profiles Data Type, all users have access to the Non-Mailable Field. In addition, based upon your configuration, you might have many more profile fields that are specific to your business needs. Contact your e-Dialog Program Manager for details.

Non-mailable refers to people who no longer receive mailings from you because they either unsubscribed from your list or their e-mail address was deemed undeliverable.

Note: Within your available data, there are some database members who did not provide information for all of the requested Fields. These empty Fields are called Undefined Values. Conversely, database members who have provided the information for a particular Data Field make up the Defined Values. When viewing Field Values within the Profiles Data Type, two additional Fields are available:

- All-Whole Database

  This is a count of the total number of records or individuals in your database, even those with incomplete Profile data.

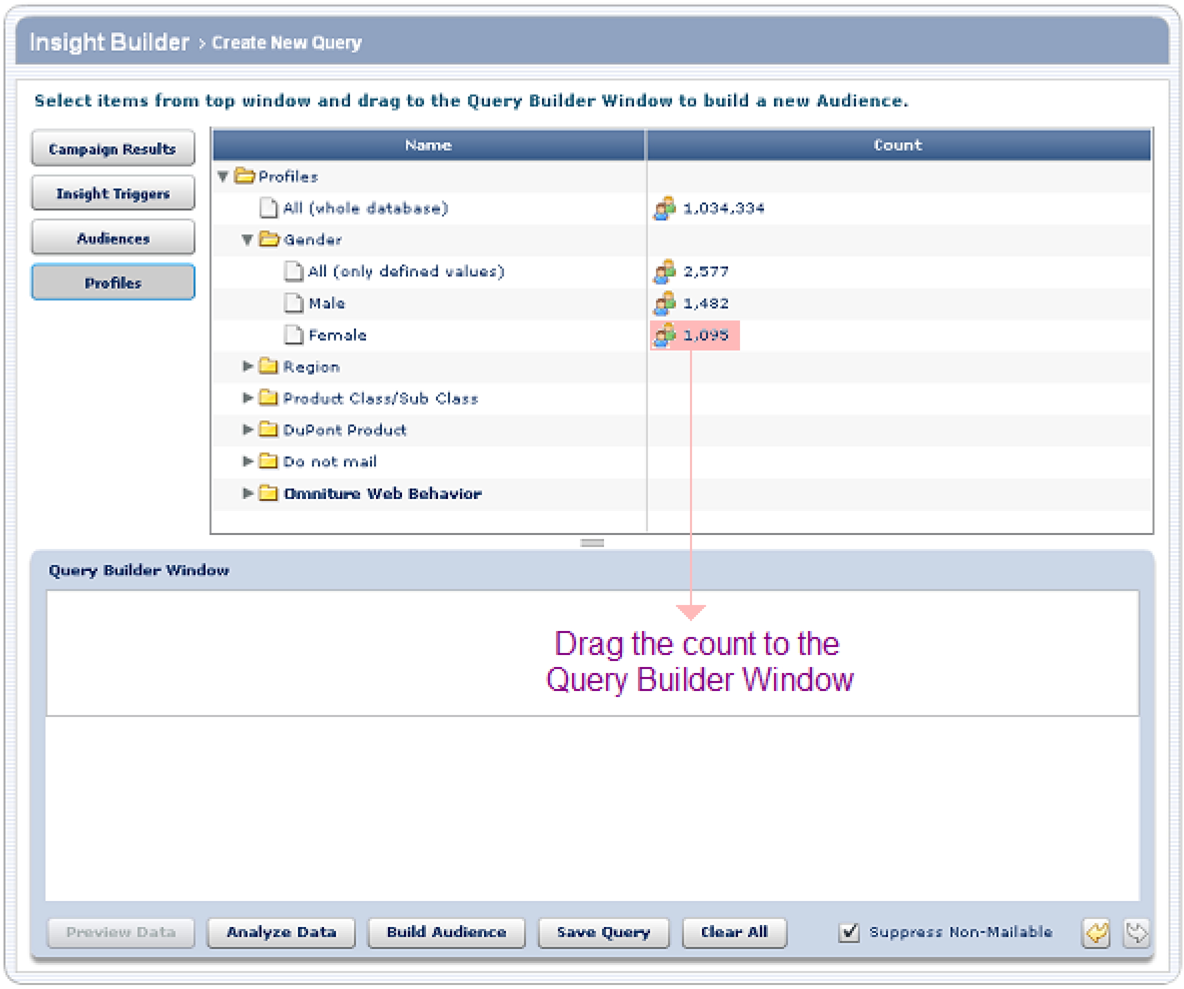
- All-Defined Values

  For a particular Data Field, this is a count of all individuals for whom the Data Field contains a valid value.

Additional data can be customized by the client within the Profile Data Type. Some examples of this additional data are Age, State, and Income.

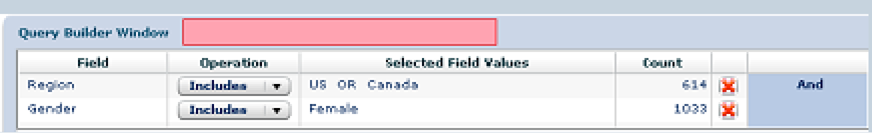
Dragging the Field to the Query Pane

When you drag a field to the Query Pane, you drag the count, as indicated in the area shaded red in the following figure:



You position the field in the Query Builder Window to specify the logical relationship between your initial criteria and any additional criteria.

Tip: When you drag a count to the Query Builder Window, the area highlighted in the following figure indicates the type of Boolean relationship (AND or OR) you are creating.



Specifying an AND relationship

An AND relationship indicates that both criteria must be true.

To specify an AND relationship:

1 Select a count from a different field from the existing criterion.

For example, if the existing field is Gender, select a count from Region.

Note: Unless a field allows multiple values, it does not make sense to specify an AND relationship between values of one field. For example, one cannot be both male and female; specifying gender equals male AND gender equals female yields an audience of 0. However, if one can select multiple teams as favorites, specifying favorite team equals Red Sox AND favorite team equals Cubs does not result in an audience of 0.

2 Drag the count to the area shaded in red in the following figure.

Specifying an OR relationship

An OR relationship indicates that either criterion must be true.

To specify an OR relationship between values of the same field:

1 Select a count from the same field as the existing criterion.

For example, if the existing field is Region, select another count from Region.

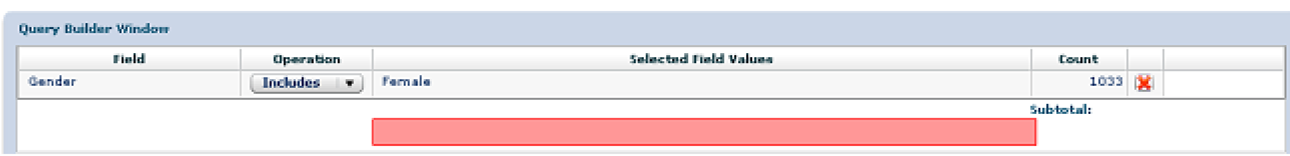
2 Drag the count to the area shaded in red in the following figure.

To specify an OR relationship between different fields:

1 Select a count from a field different from the existing field.

For example, if the existing field is Region, select a count from Gender.

2 Drag the count to the area shaded in red in the following figure.



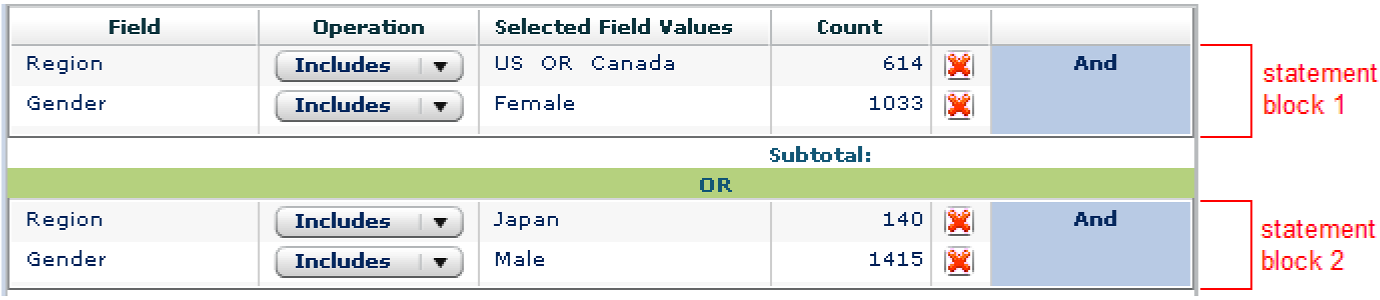
Specifying multiple relationships

You can specify more complex relationships by creating statement blocks. Each block can specify multiple criteria. For example, you might want to find female customers from the U.S. or Canada, and male customers from Japan.

The first statement block finds all customers from the U.S. or Canada who are female.

The second statement block finds all customers who are from male from Japan.

The following illustrates the two statement blocks:



Refining the Query

After you drag a field to the Query Pane, you can then specify the values of that field to use in building the query.

1 Next to the field name, select Includes or Excludes.

When you select Includes, the recipients who meet the criteria in the Field value are included in the query count. Conversely, when you select Excludes, recipients who meet the criteria in the Field value are excluded from the query count. If you create a query with only Exclude statements, the Total Count is calculated by taking the entire database and then subtracting the excluded individuals.

2 View the value in the Count column to determine whether the query returns the approximate number of customers that you expected.

Note: Unsubs and undels might still be included in the count until you click **Get Count**, as in Step 4.

3 Drag additional fields to the Query Pane to refine the query.

To remove any criteria in the query, click next to it.

4 Click **Get Count** to determine the number of customers in the audience.

5 Repeat steps 1 through 4 until the query yields the results you want.

To undo the most recent action, click .

To redo the most recent action, click .

Viewing Query Results

After you have created your query within the Query Pane, click **Get Count** to obtain query results. If an individual meets the criteria for more than one search statement, that person is counted only once.

To scroll through individual records found with your last search, click **Preview Data.**

To display detailed statistics on the results of you most recent search, click **Analyze Data.**

To build an audience, click **Build Audience.**

To exclude recipients that unsubscribed or were undeliverable from the totals, check **Suppress Non-Mailable.** To separate those who unsubscribed from those who were undeliverable, create a query that uses the fields in the **Do not mail** folder of the Profiles data type to produce the results you want.

Creating an Audience

In This Chapter

Building an Audience

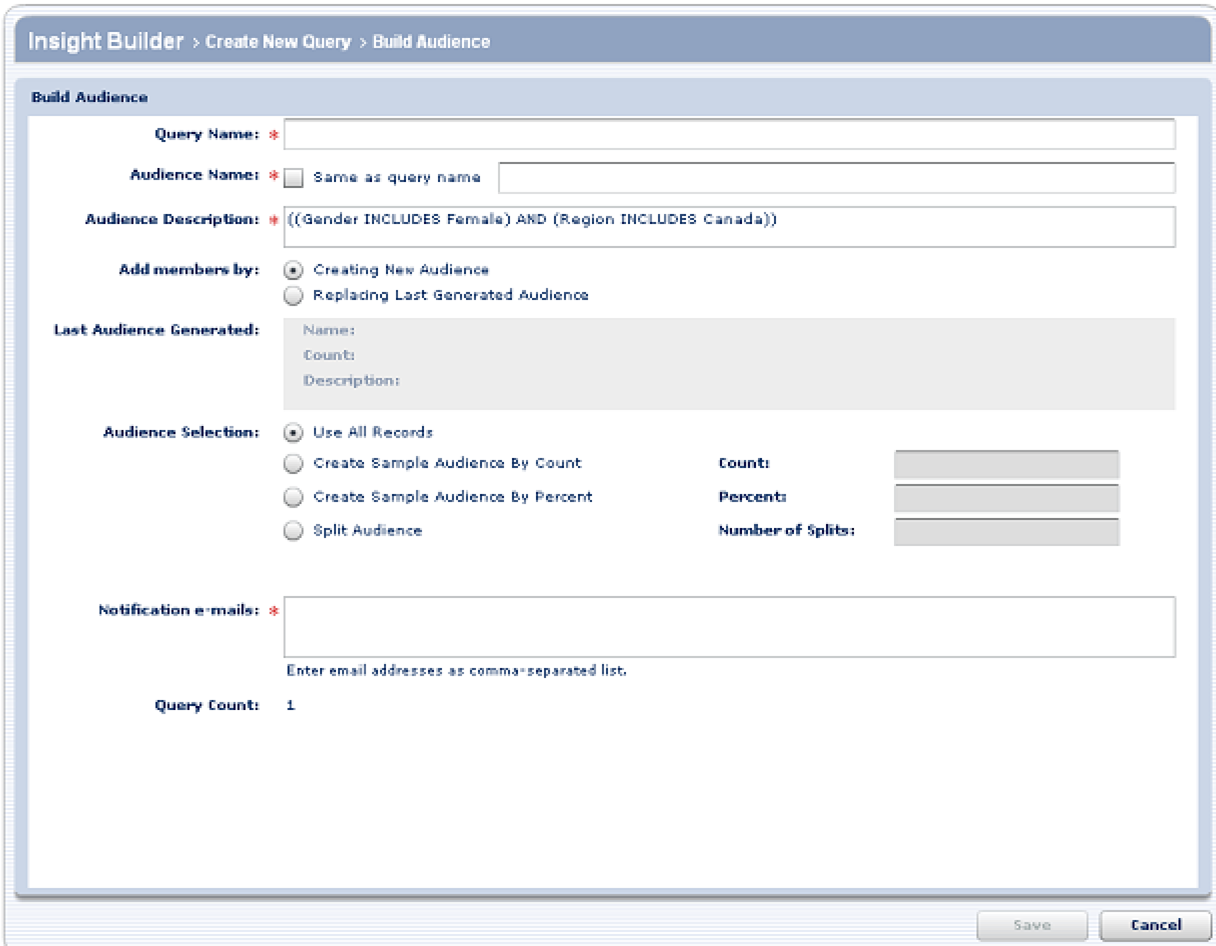
You build an audience based on the results of a query. The audience can contain all of the records in the query result set, or a portion of the records. When the audience is built, Insight Builder sends an e-mail to the address(es) you specify to inform you that the audience is available for use.

Note: You must have access to e-Dialog Data Director to build an audience.

To build an audience:

1 ***Create a query*** (on page 20).
2 Click **Get Count** to calculate the audience size.

3 Click **Build Audience.**



4 Enter the following information:

- A name for the query

  It is a good idea to give it a name that you can easily recognize when re-using it later on. If you have previously saved the query, the Query Name list box is grayed out.

- Whether to allow the audience name to use the same description as Query Name.

  If you check this check box, you cannot change the Audience Description unless you uncheck it and give the new audience a different name.

- Whether to create a new audience or replace an existing audience

  This option appears only if you are editing a query that you used previously to build an audience.

- Whether to create a sample audience from all records returned by the query or only a portion of the records

  You can build an audience that contains a specific number or a percentage of the records in the entire results set. You can also split the audience into several sample audiences; if you do so, you can only create a new audience, not replace an existing one.

- The e-mail address(es) where you want to receive notification that the audience has been created

Separate multiple e-mail addresses with a comma.

5 Click **Save.**

You can then access the audience using Data Director.

To use the list for a current mailing:

1 Copy the list ID from the notification e-mail.
2 Start Campaign Builder.
3 Go to the Audience Tab.
4 Click **From Other Lists.**
5 Paste the list ID into the **List ID Like** text box.
6 Click **View.**
7 Click the check box next to the list.
8 Click **Done.**

To export your unsubscribes to your external CFM application (to ensure data integrity and avoid re-mailing to those who have unsubscribed), you first build an audience and then use Data Director to perform the export.

Using the Analysis Tools

In This Chapter

Analyzing an Audience

After you execute a query, you can learn more about the records (customers) that you have just located. You can discover hidden trends and patterns, as well as previously unsuspected data relationships by displaying search results graphically. You can also view available profile information in a data grid that lists counts and percentages.

To analyze an audience:

1 Execute a query.

2 Click **Get Count.**

3 Click **Analyze Data.**

Creating a Graph

For each dimension/field, which has been configured for your system, you can create a graph to visually present your data.

To create a chart:

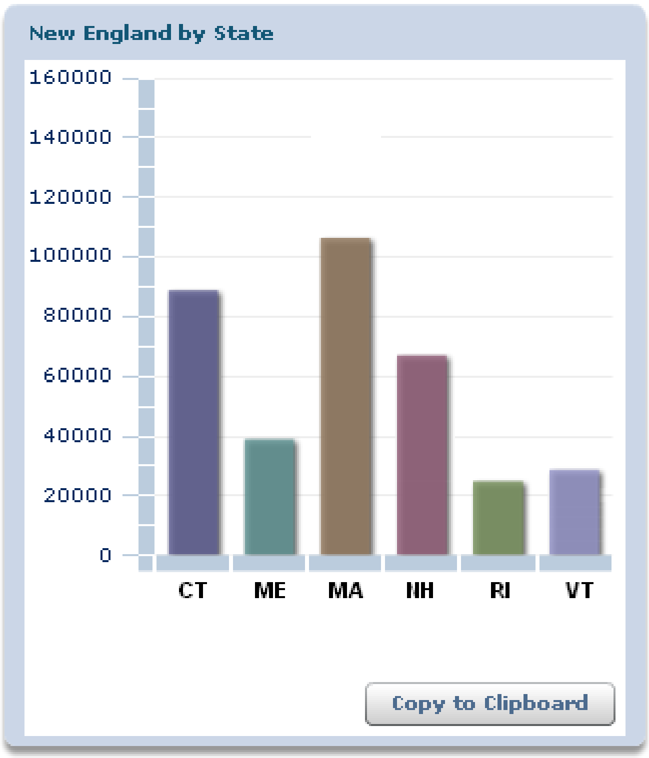
1 Click the **Charts** tab.

2 Enter the title for the chart.

3 Select Show Data Values to display values in the chart.

4 Select the dimension to chart.

5 Click **Add Chart.**



6 To view the value and percentage for each field, mouse over each of the bars in the graph.

7 To copy the values to the clipboard, click **Copy to Clipboard.**

When you click Copy to Clipboard, only values are copied; the image is not copied.

Performing Tabular Analysis

You can create a cross tab table to analyze an audience.

1 Click **Cross Tabs.**

2 Select whether to show values or percentages.

3 Select the dimension to appear in rows.

4 Select the dimension to appear in columns.

5 Click **Add Table.**

State/Domain	aol.com	hotmail.com	msn.com	yahoo.com	comcast.net	Total
Connecticut	9000	6000	1000	20000	4000	**40000**
Massachusetts	20000	10000	6000	20000	20000	**76000**
Rhode Island	1000	4000	2000	4000	1000	**12000**
Totals:	**30000**	**20000**	**9000**	**44000**	**25000**	**128000**

The rows of the table contain the results of the query. The columns contain all possible values.

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