IBM Unica Distributed Marketing
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Administrator's Guide

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Preface

■ Contacting IBM Unica technical support

Contacting IBM Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

Information you should gather

Before you contact IBM Unica technical support, you should gather the following information:

- A brief description of the nature of your issue.

- Detailed error messages you see when the issue occurs.

- Detailed steps to reproduce the issue.

- Related log files, session files, configuration files, and data files.

- Information about your product and system environment, which you can obtain as described in "System Information" below.

System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under each application's installation directory.

Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (http://www.unica.com/about/product-technical-support.htm).

1 Introduction to IBM Unica Distributed Marketing Administration

- About IBM Unica Distributed Marketing
- About corporate marketers
- About field marketers
- To log in to IBM Unica Marketing

About IBM Unica Distributed Marketing

IBM Unica Distributed Marketing provides marketing organizations with the ability to distribute the execution of centrally managed marketing campaigns throughout the enterprise. It allows centralized marketers to maintain control over corporate standards and business rules, while allowing remote users to tailor or provide input to the campaign for greater local customization and relevancy - ultimately increasing response rates and revenue.

Distributed Marketing supports campaign customization by remote users; but the remote users can change only those parameters specified by the campaign designer.

For example, a retail company might want to centrally control certain selection criteria, but allow individual store owners to control selections related to their stores or locations.

About corporate marketers

In Distributed Marketing, corporate marketers develop templates for reusable campaign logic and lists of customer contacts. Corporate marketers manage corporate campaigns and oversee marketing activities of field marketers.

Corporate marketers specialize in designing and generating campaigns from which the field marketer can choose.

Primary corporate marketer tasks

In Distributed Marketing, corporate marketers perform the following tasks:

- Design campaign flowcharts.

- Create corporate campaigns.

- Manage campaign workflow.

- Create reports used to assess campaign success.

- Design templates for Corporate Campaigns, On-demand Campaigns, and Lists, for use by field marketers and other corporate marketers.

Corporate marketer tasks in Campaign

Corporate marketers also frequently use Campaign, through which they design and build flowcharts that are associated with Lists, On-demand Campaigns, and Corporate Campaigns.

Corporate marketer roles

Corporate marketers must be assigned the Corporate Marketer role in the Global security policy, or its equivalent, in order to perform their tasks.

To work in Campaign, corporate marketers must be assigned the following roles:

- Global Policy Execute

- Global Policy Design

- Global Partition Design or Execute

  ☼ Corporate marketers require this privilege to work with user variables in Campaign.

About field marketers

Field marketers create and run local or regional marketing activities for a territory or line of products. Field marketers work directly with customers, understand their needs, and can make good decisions on how best to reach their customers with on-demand or corporate marketing campaigns.

Field marketers may be line-of-business users, partners, branch office managers, retail store managers, or members of local sales forces. Field marketers create on-demand (local) campaigns that they can run at any time to target a local customer base.

Field marketers tasks

In Distributed Marketing, field marketers work with:

- Lists

Field marketers typically create Lists in Distributed Marketing and define criteria to select contacts for the Lists. These Lists can then be used by one or more On-demand Campaigns as needed.

- On-demand Campaigns

  Field marketers can create and run On-demand Campaigns to target their set of customers.

- Corporate Campaigns

  Field marketers subscribe to the Corporate Campaigns they want to participate in. For those Corporate Campaigns, field marketers review and choose which of their customers are targeted by the Corporate Campaign.

Field marketer roles

Field marketers must be assigned the Field Marketer role in the Global security policy, or its equivalent, in order to perform their tasks.

To log in to IBM Unica Marketing

Before you begin working with IBM Unica Marketing, you need the following.

- An intranet (network) connection to access your IBM Unica Marketing server.
- Microsoft Internet Explorer installed on your computer.
- User name and password to sign in to IBM Unica Marketing.
- The URL to access IBM Unica Marketing on your network. If you are uncertain of the correct URL or need a user name or password, contact your IBM Unica Marketing administrator.

1. Launch the Microsoft Internet Explorer browser.

2. Enter the IBM Unica Marketing URL in the browser's address field.

   If IBM Unica Marketing is integrated with Windows Active Directory or with a web access control platform, and you are logged in to that system, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator. Your login is complete. Otherwise, a login page appears.

   If your version of IBM Unica Marketing uses SSL, you may be prompted to accept a digital security certificate the first time you sign in. Click **Yes** to accept the certificate.

3. Enter your user name and password, then click **Sign In**.

   A Change Password page may display, depending on how IBM Unica Marketing password rules are configured. Enter a new password, confirm by entering it again, and click **Change Password**.

If your login is successful, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator.

2   Customizing IBM Unica Distributed Marketing

■   About customizing Distributed Marketing
■   To set your basic options
■   To set your instance options
■   Setting your start page
■   The Calendar

About customizing Distributed Marketing

Users can customize the Distributed Marketing interface to meet their needs. These settings are available in the Distributed Marketing Settings. The following table describes what you can customize.

Option	Description
Basic Settings	Use these options to set your default security policy.
Instances Options	Use these options to customize your default view of Lists, On-demand Campaigns, and Corporate Campaigns.
Calendar/ Timeline Settings	Use these options to customize how you view the system calendar.

Related Topics

• To set your basic options

To set your basic options

Your basic options allow you to choose the security policy used by default when you create new items.

1.   Select **Settings > Distributed Marketing settings**.

The Administrative Settings page opens.

2.   Click **Basic Settings**.

The Basic Settings page opens.

3. Select the security policy you want to use by default when you create new items in Distributed Marketing in the **Default Security Policy** field.

   You can leave **Global** selected, which is the default, to use the global security policy set up by your administrator, or you can select a security policy that your administrator instructed you to select. As a best practice, do not change the security policy without the guidance of your administrator.

4. Click **Save Changes** to save your changes.

To set your instance options

Instance options allow you to customize your default views of Lists, On-demand Campaigns, and Corporate Campaigns. For example, you may want to specify that the On-demand Campaigns list that opens by default shows only On-demand Campaigns set to run in the current week.

1. Select **Settings > Distributed Marketing settings**.

   The Administrative Settings page opens.

2. Click **Instances Options**.

   The Instances Options page opens.

3. In each of the List, On-demand Campaign, and Corporate Campaign sections, select the default view.

4. Click **Save Changes** to save your changes.

When you open the Lists, On-demand Campaigns, or Corporate Campaigns page, your default list is shown.

Setting your start page

If you do not want to have a dashboard page appear when you first log in to IBM Unica Marketing, you can select a page from one of the installed IBM products as your start page.

To set a page you are viewing as your start page, select **Settings > Start on current page**. Pages available for selection as a start page are determined by each IBM Unica Marketing product and by your permissions in IBM Unica Marketing.

On any page you are viewing, if the **Start on current page** option is enabled, you can set the page as your start page.

The Calendar

■ About the calendar

- About calendar features
- To access the calendar
- Navigating the calendar
- To set per-session calendar views
- To access calendar objects by date
- To access an object from the calendar
- To export the calendar
- To publish the calendar
- Viewing the timeline
- Viewing the text or graphical calendar

About the calendar

Field marketers and corporate marketers can use the Distributed Marketing calendar to view the time horizon for marketing campaigns.

Historically, organizations have produced paper-based calendars and have updated them with the latest calendar-driven data. The calendar functionality provides marketing groups with an electronic means of viewing and updating this data.

You can use the calendar as an aid for planning marketing campaigns as follows.

- You can view and update the time lines for Lists, On-demand Campaigns, or Corporate Campaigns.
- You can get an up-to-date view of planned or executed marketing efforts over time.

You can customize the appearance of the calendar in the following ways.

- You can set your default view of the calendar by using the **Calendar/Timeline Settings** screen.
- You can choose the look of the calendar by using the Set View Options dialog box.

Related Topics

 • Setting the appearance of the calendar

 • To set your basic options

About calendar features

The Distributed Marketing calendar has the following features:

- You can display a calendar for Lists, On-demand Campaigns, or Corporate Campaigns.
- The calendar includes start and end dates for the displayed items.
- You can display Corporate Campaigns and On-demand Campaigns on the same calendar in different colors for easy differentiation.

- You can open a Corporate Campaign, List, or On-demand Campaign directly from the calendar.

Default and per session calendar views

You can use one of two types of settings when you view the calendar:

- The default calendar settings, which are in effect every time you log in.

- The per session calendar settings. The per session calendar is the calendar that results from making temporary changes to the calendar view, without changing the default settings.

Objects displayed in a calendar

You can display any of the following objects in a calendar:

- Corporate Campaigns

- On-demand Campaigns

- Lists

- Corporate Campaigns and On-demand Campaigns

Calendar item dates

Each List, On-demand Campaign, or Corporate Campaign displayed in a calendar has a start and end date. These are the target start and end dates you set when you create the object.

About display options for the calendar

You can modify the calendar display in the following ways:

- You can modify the default calendar settings.

- You can set the calendar view for the current session.

- You can toggle between calendar views:

    - Timeline view

    - Calendar grid view

    - Text view

- You can use the advanced search feature to filter the Lists, On-demand Campaigns, or Corporate Campaigns displayed in the calendar.

Timeline view

This view displays a time-based view of the Lists, On-demand Campaigns, or Corporate Campaigns you select to display. You can select the time range for the calendar items you select to display in a timeline view.

In a timeline view, each calendar item is displayed as a horizontal bar across its date range. If you enable color coding, each calendar item is colored according to attributes you select.

You can select the date range for the timeline from the following options:

- **Week** displays one week. Each day is listed as a column. The starting day is either Sunday or Monday, depending on the default calendar settings.

- **Month** displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.

- **Quarter** displays three calendar months. Each week is listed as a column, and weeks are grouped into months.

- **Fiscal Year** displays a fiscal year. Your administrator can configure the starting month for a fiscal year. Each month is listed as a column, and the months are grouped into quarters.

- **Calendar Year** displays a calendar year that starts in January and ends in December. Each month is listed as a column, and the months are grouped into quarters.

☼ Any day specified as non-work time is grayed out in a timeline view.

Month-based text or calendar grid view

A month-based calendar view displays a calendar for a selected month.

In addition to a month-based timeline view, you can select from the following month-based calendar views:

- 1-Month Text: Each day contains a text listing of selected Collaborate Lists, On-demand Campaigns, or Corporate Campaigns.

- 1-Month Calendar Grid: Each calendar item is displayed as a horizontal bar that begins on the item start date and ends on the item end date. If you enable color coding, each calendar item is colored according to attributes you select.

☼ Any day specified as non-work time is indicated by a gray X in the background in a calendar grid view.

Color-coded by attribute view

You can color-code the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns by selected attributes. You can apply color-coding to a calendar grid view or to a timeline view.

You can filter the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns according to the values of a selected attribute, such as the following:

- Execution status

- Schedule status

- Template type

The calendar displays a legend in the lower-right corner of the screen.

For example, consider the following On-demand Campaign attribute and its possible values:

• Attribute name: Campaign Execution Status

• Valid attribute values: Active, Complete, Under development

If you group and display On-demand Campaigns by Campaign Execution Status, the resulting calendar appears with four colors in the legend. There is one color for each valid attribute value, and one for N/A.

☼ The color assigned to N/A appears in the calendar when calendar items are not assigned a value for the selected attribute.

About the horizontal bars used in calendars

The timeline view and calendar grid view display calendar items as horizontal bars.

Note the following about the bars:

• The bars represent the date range for objects displayed on the calendar.

• The bar color depends on values of an attribute you optionally select for color coding.

• The shape of the bars determine the following about item start and end dates:

    • Rounded left end: The start date is the date indicated by the left end of the bar.

    • Rounded right end: The end date is the date indicated by the right end of the bar.

    • Flat left end: The start date is prior to the visible date range.

    • Flat right end: The end date is beyond the visible date range.

To access the calendar

You can access the calendar in one of the following ways:

• View the calendar for Corporate and On-demand Campaigns from the Home page.

• View the default calendar.

• View a calendar for a set of Lists, On-demand Campaigns, or Corporate Campaigns.

1. From the **Distributed Marketing** menu, select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns**.

2. From the **View** menu, select from **Set View Options**.

3. Set view options, and select to view the calendar.

4. Click **Apply**.

Navigating the calendar

All calendar/timeline views contain the following icons:

Icon	Description
	Opens the Set View Options dialog box. Use this link to change the way the calendar appears.
	Opens the Advanced Search dialog box.
	Changes the date range displayed, moving back one unit in time. For example, if your current calendar view is a monthly timeline of September 2009, clicking displays August 2009.
Current date range	Opens a drop-down list of available date ranges. Use this link to quickly change to any other date range. For example, if you are viewing a monthly calendar for July 2009, you can change the view to January 2010 by clicking this link and then choosing January 2010 from the drop-down list.
	Changes the date range displayed, moving forward one unit in time. For example, if your current calendar view is a weekly timeline from 7/20/2009 through 7/26/2009, clicking displays 7/27/2009 through 8/2/2009.

To set per-session calendar views

You can change the views of the calendar from default settings by clicking View from any of the following:

• The Calendar page

• A listing of Lists, On-demand Campaigns, or Corporate Campaigns.

1. Access the calendar.

2. Click **View**.

   The Set View options dialog box opens.

3. Select options to change the view.

4. Click **Apply**.

To access calendar objects by date

You can filter the calendar to display all of the Collaborate objects for a selected date.

For example, if the calendar is currently displaying Corporate Campaigns for June, 2009, You can click **7** to open a list page containing all Corporate Campaigns whose date ranges contain June 7th, 2009.

1. Click the date in an open calendar displaying Lists, On-demand Campaigns, or Corporate Campaigns.

To access an object from the calendar

You can view the List, On-demand Campaign, or Corporate Campaign from its calendar.

1. Click the List, On-demand Campaign, or Corporate Campaign on the calendar.

The List, On-demand Campaign, or Corporate Campaign opens.

To export the calendar

You can save a snapshot of the current calendar in HTML format. The calendar is saved in a ZIP archive file.

1. With the calendar open, click the menu next to the print icon ( ) and select **Export**.

2. Choose one of the following options:

   • Click **Open** to open the ZIP file of the calendar.

   • Click **Save** and choose a location, to save the calendar to disk.

   • Click **Cancel** to return to the Calendar screen without publishing.

The system publishes the calendar into a ZIP file archive.

To publish the calendar

To get a snapshot of the current calendar, save it in HTML format (into a ZIP archive file).

1. Choose the calendar view to publish.

   Select the objects, time range, and appearance for the calendar view. You can do this in either of the following ways:

   • From the **Local Marketing** menu, select **Calendar**, then select items to view.

   • At a list page for Lists, On-demand Campaigns, or Corporate Campaigns, click

     the View icon ( ) and choose a calendar view.

2. Click the **Print** icon ( ) and select **Export**.

3. Do one of the following.

- Click **Open** to open the ZIP file of the calendar.

- Click **Save** and choose a location, to save the calendar to disk.

- Click **Cancel** to return to the Calendar page without publishing.

The system publishes the calendar into a ZIP file archive. You can use any application for working with ZIP files to access the calendar HTML pages. Note that you can navigate to the next and previous pages of the calendar view in your web browser. If you exported any project data, you can also navigate to that data from the calendar HTML pages.

Viewing the timeline

If you choose a timeline view, you can choose from several date ranges; the screen can display a single week's data all the way up to an entire year's worth of data.

Related Topics

- Navigating the timeline view

- About timeline view of the calendar

- About horizontal bars on the calendar

About timeline view of the calendar

This view displays a grid-like view of the objects by some unit of time, depending on which timeline view you selected.

Each object is displayed in a horizontal bar across its date range. The name of the object displays on the bar.

☼ If you select **Enable Color Coding** from the calendar view options screen, each object's bar appears in a color based on an attribute you chose.

Choose a date-range for the timeline.

- **Week**: displays one week, with each day listed as a column. The starting day is either Sunday or Monday depending on the option selected in the Calendar/Timeline Settings screen.

- **Month**: displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.

- **Quarter**: displays three calendar months. Each week is listed as a column, and those weeks are grouped into months.

- **Fiscal Year**: displays a fiscal year (starting month depends on a configuration setting, `firstMonthInFiscalYear`). Each month is listed as a column, and the months are grouped into quarters.

- **Calendar Year**: displays a calendar year (starts in January and ends in December). Each month is listed as a column, and the months are grouped into quarters.

☀ Any day that has been specified as non-work time has its column grayed out. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.

Navigating the timeline view

You can navigate the timeline by doing any of the following:

- Click the expand icon (+) next to an object to display tasks within the workflow for that object.

- Click the object name to drill-down to a timeline containing the objects contained in its hierarchy.

  ☀ Clicking a task opens the Workflow page of the project with which the task is associated.

- Click the zoom in (🔍) and zoom out (🔍) icons. These icons appear above the timeline. Zooming changes the date range of the timeline. For example, zooming in from a monthly timeline takes you to a weekly timeline. The top-level is yearly, and the lowest level is weekly.

Viewing the text or graphical calendar

The calendar views display data for a selected month. The page displays a grid containing a column for each day of the week: either five columns representing the weekdays, or seven, if you have chosen to display weekend days. You set this option on the Calendar/Timeline Settings page.The page contains either five or six rows, each representing a week.

The view contains a cell for each day of the selected month. The cell for a day contains either a list of items active on the day (text) or a portion of a horizontal bar for each active item (graphical).

Related Topics

- About the monthly calendar
- About timeline view of the calendar
- About calendar color coding
- About horizontal bars on the calendar

About the monthly calendar

This view displays a calendar of the selected month. It lists the objects you selected and filtered on.

Choose either of two, monthly, calendar views.

- **1-Month Text**: Each day contains a list of objects. An object is displayed for all days in its date range.

- **1-Month Graphical**: Each object is displayed in a horizontal bar that begins on its start date and ends on it end date. If you select **Enable Color Coding** from the calendar view options page, each object's bar appears in a different color.

☼ Any day that has been specified as non-work time is indicated by a gray X in the background. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.

Navigating the text/graphical calendar

Navigate the calendar by performing any of the following actions:

- Click the object to display its summary page. For example, clicking a List opens the List's Summary page.

- Click the date to display a list page containing objects falling on that date. For example, if the calendar is currently displaying Lists for June 2009, clicking on 9 opens a page containing all Lists whose date ranges contain June 9, 2009.

About calendar color coding

You can display objects in a color-coded manner on either the graphical calendar or in the timeline views.

You first select the **Enable Color Coding** check box in the either the Calendar/Timeline Settings page or the Set View Options dialog box. After you check the box, the **Based on values for** drop-down menu displays. This list contains attributes for your Lists, On-demand Campaigns, and Corporate Campaigns.

From this list, you can choose any attribute that is an enumerated type. For example, consider the following attribute:

- Name: Product Family

- Valid values: CDs, Credit Card, Home Mortgage

If you choose to group objects by this attribute, your calendar contains four colors: one for each valid value, plus **N/A**, corresponding to any objects that do not contain a value for the Product Family attribute.

The calendar also displays a legend in the lower-right corner of the screen. The legend lists all valid values (plus **N/A**) along with the color corresponding to that value.

About horizontal bars on the calendar

The timeline view and graphical calendar view display horizontal bars.

Note the following.

- The bars represent the date range for objects displayed on the calendar.

- The name of the object displays on the bar.

- The bars may be colored based on an attribute you select.

- The shape of the bars indicate the following:

    - Rounded-end "start": indicates the object starts on the date where the bar has a rounded end.

    - Rounded-end "end": indicates the object ends on the date where the bar has a rounded end.

    - Flat-end "start": indicates the object starts prior to the visible date range.

    - Flat-end "end": indicates the object ends after the visible date range.

To color-code calendar items

You can use color-coding to display objects in a calendar according to a selected attribute.

For example, you can display different colors of Corporate Campaigns, according to whether or not the Corporate Campaign is active.

☼ You can also set color-coding for the default calendar settings.

1. Open one of the following:

    - Calendar

    - Lists

    - Corporate Campaigns

    - On-demand Campaigns

2. Click **View**.

    The Set View Options dialog box opens.

3. Check **Enable Color Coding**.

4. Choose a calendar item and corresponding attribute on which to base color-coding from the lists that appear.

5. Click **Apply**.

To zoom in or out of a timeline view

When you select a timeline view, you use the zoom feature to expand or collapse the date range for the view.

The top level for zooming out displays a year-based date range.

The lowest level for zooming in displays a week-based date range.

For example, zooming in from a monthly timeline takes you to a weekly timeline.

1. Click the zoom in icon ( ) or zoom out icon ( ) to change the view.

3 Administrative Settings

- Administrative settings
- Configuring display options for the calendar
- About managing users
- About synchronizing users
- About flowchart run monitoring
- About setting default alert subscriptions
- About system wide non-work dates
- About managing published searches
- About list definitions

Administrative settings

When you select **Settings > Distributed Marketing Settings**, the system displays the Administrative Settings page. This page contains the following links:

Link/Section	Description
User Personalization section	This section contains links for users to customize Distributed Marketing in order to view and receive information that is important to them.

Restricted Options

Link/Section	Description
Security Policy Settings	Contains links to all security policies defined in your system. See Creating new security policies for details.
User Permissions	Displays a list of all users authorized to use Distributed Marketing, organized by the group(s) to which they are assigned. See To assign security roles for details.
Synchronize Users	Synchronizes the users in Distributed Marketing with the users in the IBM Unica Marketing Platform. See Synchronizing users for details.
Flowchart Runs Monitoring	The Flowchart Runs Monitoring page displays any errors in flowchart runs for your system and enables you to troubleshoot the problems.

Accessible Options

Link/Section	Description
Default Alert Sub-scriptions	Opens a page for setting up and editing default alert subscriptions for Distributed Marketing objects. See Setting default alert subscriptions for details.

Other Options

Link/Section	Description
List Definitions	Contains links to the available lists where an administrator can populate or define list values. See List Types for details.
Template Configuration	Contains links to functions concerning template components, template construction, and bulk operations (import and export). See Template Configuration page for details.
Non-working Business Days	Opens a page for updating the set of system-wide non-work dates. See System wide non-work dates for details.
Manage Published Searches	Opens a page for publishing searches that have been saved by Distributed Marketing users. See Managing published searches for details.

Configuring display options for the calendar

Selecting **Distributed Marketing > Calendar** opens a time-centric view of your business processes. When you view the calendar, its appearance depends on several options that you (or your administrator) have previously set:

- Set the default calendar view: Use the Calendar/Timeline Settings page in the Administrative Settings to set the default appearance for the calendar.

- Set the initial calendar view: After setting the Calendar options, you can change the

    initial view by clicking the **View** icon (   ) on the Calendar page.

- Toggle between calendar views: You can use the **View** icon (   ) on the Calendar page to choose from timeline or calendar views, as well as the time range displayed.

☼ The **View** icon (   ) is also available from the Projects, Programs, Plans, and Tasks list pages.

Setting the appearance of the calendar

You can set the appearance of the calendar in either of two ways.

- You set your initial and default view of the calendar.

- You can change most of the options while viewing the calendar.

Use the Calendar/Timeline Settings page to set these parameters.

Field	Description
Include Weekend Days	You choose whether the calendar shows a five-day week or a seven-day week by specifying this option. Select **Yes** to display a seven-day week.
Weeks Should Begin On	You can specify whether the calendar displays Monday as the first day or Sunday as the first day, even if weekends are shown on the calendar. Select either Sunday or Monday. Sunday is the default.
Default Content of Calendar Section	You can choose which objects to display on the calendar. Select one of the following. • Plans (the default) • Projects • Programs • Tasks
Default Search of Calendar Section	Allows you to choose the filter for the objects displayed on the calendar. Select a saved search to be the default when you click the Calendar menu item. The list of available items depends on which objects you selected for the Default Content field. For example, if you selected Projects for the default content, you could choose Active Projects for the default search.
Default Layout of Calendar Section	Allows you to choose from timeline or calendar views, as well as the time range displayed.

The following parameters are available on both the Calendar/Timeline Settings page and the Set View Options dialog box.

Field	Description
Display as and Time Scale	On the Calendar/Timeline Settings page, you choose the calendar view using the **Default Layout of Calendar Section** field. On the Set View Options dialog box, you use the **Display as** and **Time Scale** fields to perform the same action.
Enable Color Coding	Allows you to color code the calendar based on an attribute you select. This is a 2-step process: First, check the **Enable Color Coding** check box. Then, select the attribute to use for color coding the objects on the calendar.
When displaying tasks, only show milestones	Allows you to limit the amount of information when displaying tasks on the calendar. Check this box, then choose the milestone types to hide most tasks when displaying project tasks. Only the selected milestone types will be displayed.

The following option is available only on the Set View Options dialog box.

Field	Description
Brief/Detailed	Allows you to determine the amount of information displayed for tasks. This is available for tasks only.

To set your default calendar options

You set all available options for the calendar using the Calendar/Timeline Settings page. The settings you choose remain in effect between your sessions. That is, if you log out of IBM Unica Marketing, and then log back in later, your calendar appears with the options you last set on this screen

1. Select **Settings > Distributed Marketing Settings**.

2. Click **Calendar/Timeline Settings**.

   The Calendar/Timeline Settings page appears.

3. Fill in the details on the Calendar/Timeline Settings page.

4. Do one of the following:

   • Click **Save Changes** to save your changes.

   • Click **Revert to Saved** to discard your changes, and reload the settings from your previous save.

   • Click **Cancel** to exit the page.

Related Topics

• Setting the appearance of the calendar

About managing users

You create and manage users and user groups in the IBM Unica Marketing Platform. As a best practice, set the locale preference for IBM Unica Distributed Marketing administrators to match the default locale for your Distributed Marketing installation. For details on creating users, logins and groups, setting user locales, and assigning application access, see the *IBM Unica Marketing Platform Administrator's Guide.*

Once you create users in the Marketing Platform, you must synchronize the user tables in Distributed Marketing with the platform user tables.

Then you assign access rights for the authorized users by assigning security policies within Distributed Marketing.

If you do not see the users you expect in Distributed Marketing, make sure the group has application access rights to Distributed Marketing and you have synchronized the user tables.

Related Topics

- Security policies and permissions
- About synchronizing users
- About security

About user permissions

After you edit the Global security policy and add any additional security policies containing roles and permissions, you must assign users to the roles you defined.

After you assign users to roles, users can only access information and perform tasks for which they have permission.

Note the following:

- If you do not assign a role to a user, the Global policy determines the user's permissions.

- If you decide to remove a role from a security policy, all users assigned to the role immediately lose access to anything that the role allowed them to access. This occurs even if the user is logged in.

To assign roles to a user

You must have administrative permissions to complete this task.

1. Select **Settings > Distributed Marketing settings**.

   The Administrative Settings page opens.

2. Click **User Permissions**.

   The User Permissions page opens.

3. Expand the Administrators, Corporate Marketers, or Field Marketers group.

4. Select the user for whom to assign a role.

    The Properties screen for that user opens. The roles that you can assign the user to appear categorized under each security policy in the Available Roles list box.

5. Expand the security policy that contains the role to assign to this user in the Available Roles list box.

6. Select the role and click the arrow button to move the role to the Selected Roles list box.

    To assign more than one role to a user you can continue to use the arrow buttons to move roles into the Selected Roles list box.

7. Click **Save Changes** when you finish adding all the roles for this user.

    The role appears under the Assigned Role(s) column in the User Permissions screen.

Repeat this task for other users as necessary.

About synchronizing users

You can manually synchronize the IBM Unica Distributed Marketing user tables with the IBM Unica Marketing Platform user tables. This enables new users to log in to Distributed Marketing and for changes to take effect before the next scheduled synchronization as set by the UAPInitParam usermangerSyncTime parameter in the collaborate_config.xml file. Synchronizing pulls over all the user information from the IBM Unica Marketing Platform to IBM Unica Distributed Marketing.

To synchronize users manually

1. Log into Distributed Marketing.

2. Click **Settings**> **Distributed Marketing Settings**.

3. Click **Synchronize Users**.

About flowchart run monitoring

You can use the Flowcharts Run Monitoring page to check on the status of flowchart run requests that have been sent to Campaign.

☼ For more information on why a flowchart did not run successfully, you can view the logs for the campaign in Campaign.

There are two panes in the Flowcharts Run Monitoring page, as described below.

Flowchart defective runs pane

The Flowchart defection runs pane shows requests to run flowcharts that have stayed in a Scheduled, Queued or Running state for longer than a specified time.

If a request has not succeeded, it is displayed in the Flowchart defective Runs pane, as well as in the Scheduler jobs pane.

There are two checkboxes next to each entry on the Flowchart defective Runs pane, **Get Results** and **Reset Run Status**. These two checkboxes are enabled or not, depending on the current state of the request.

Checking **Reset Run Status** of a queued request sets its status to Failed, and removes it from the Flowchart defective runs pane; it still appears in the Scheduler Jobs pane as a Failed request.

Scheduler Jobs pane

The Scheduler Jobs pane shows information on all tasks that are currently in the Queued (Not Started) or Running state, as well as jobs that failed after they were started by Campaign.

Following are the possible job states:

- **Running**

  The task is currently running in Campaign.

  The maximum number of tasks that can be running simultaneously is controlled by the combination of the initialization parameters **flowchartServiceSchedulerServices10ThrottleType** and **flowchartServiceSchedulerServices10ThrottleValue**, as defined in the *Marketing Platform-home*/Distributed Marketing/conf/collaborate_config.xml file.

  ☼ You cannot cancel or delete a job in the Running state.

- **Results Pending**

  The task has been run but the results have not been received by Distributed Marketing. If a job gets stuck in Results Pending status, the results can sometimes be retrieved by checking **Get Results** in the Flowchart Defective Runs pane and clicking **Save**.

- **Not Started**

  The job is scheduled, but not yet run. This is the same as a Queued state in the Flowchart Defective Runs pane. You can cancel a job in the Not Started state by deleting it, which removes the job from the queue and sets its status to Failed. An unlimited number of jobs can be in the Not Started state.

- **Failed**

  The job was reported as failed by Campaign. You should investigate the failure by examining the campaign's logs in Campaign. When you have resolved the issue, you can delete the failed job.

Related Topics

- To set the delay time before a flowchart run is reported as defective
- Initialization parameters
- To refresh the Flowchart Runs Monitoring page
- To reset the run status of a queued request
- To get job results
- To delete a scheduled task

To set the delay time before a flowchart run is reported as defective

To perform this task, you must have write-access to the Distributed Marketing installation directory.

You perform this task to modify the time delay before a flowchart run task is reported as defective in the Flowcharts Run Monitoring page.

1. Open the *Marketing Platform-home*/Distributed Marketing/conf directory.

2. In an XML editor, open the collaborate_config.xml file.

3. Set the value for the **minimumDelayForExecutionMonitoring** parameter.

   The default value is 10,800 seconds, or three hours.

4. Save and close the file.

You must restart Distributed Marketing for the change to take effect.

To refresh the Flowchart Runs Monitoring page

You refresh the Flowcharts Run Monitoring page to see the latest new jobs and changes in the status of existing jobs.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Flowchart Runs Monitoring**.

   The Flowchart Runs Monitoring page opens.

3. Click the Refresh icon ( )

The list of defect runs and schedule jobs is updated.

To reset the run status of a queued request

You reset the run status for a queued request to set its status to Failed, which removes it from the Flowchart defective runs pane; it still appears in the Scheduler Jobs pane as a Failed request.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Flowchart Runs Monitoring**.

   The Flowchart Runs Monitoring page opens.

3. In the Flowchart defective runs pane, next to the request with the status of Queued, check **Reset Run Status**.

4. Click **Save Changes**.

The run status is changed from Queued to Failed. The task appears in the Scheduler Jobs pane as a Failed request.

To get job results

You can get job results for a task in the Results Pending state.

☼ Depending on why the task results have not been received by Distributed Marketing, this task may not successfully retrieve the task results.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Flowchart Runs Monitoring**.

   The Flowchart Runs Monitoring page opens.

3. In the Flowchart defective runs pane, next to the run with the status of Results Pending, check **Get Results**.

4. Click **Save Changes**.

If possible, the results are sent to Distributed Marketing. If the results are not successfully sent, you should examine the campaign's logs in Campaign for information about the problem.

To delete a scheduled task

You can delete a task in the Failed or Not Started state.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Flowchart Runs Monitoring**.

The Flowchart Runs Monitoring page opens.

3. In the Scheduler Jobs pane, next to the run with the status of Not Started or Failed, check **Delete**.

4. Click **Save Changes**.

The selected tasks are deleted.

About setting default alert subscriptions

As an administrator, you can configure which object access roles should receive which alerts. The IBM Unica Distributed Marketing objects for which you can can set up default alert subscriptions are the following.

- Lists

- On-demand Campaigns

- Corporate Campaigns

Default subscriptions are set according to the level of access level for users (participant or owner), and by Distributed Marketing object. For example you could set up default alerts for Corporate Campaigns so that owners and participants are notified when a workflow task is started.

Notes on setting default alert subscriptions

When you work with the the **Default Alert Subscriptions** page, note the following.

- Remember, you are creating a default setting. If users have permission through the security policies, they can change these default settings for each List, On-demand Campaign, or Corporate Campaign.

- When you modify default alert subscriptions, it does not affect existing items; it affects only objects created after your modifications.

User overrides of default alert subscriptions

Users can subscribe to alerts within the following objects.

- Lists

- On-demand Campaigns

- Corporate Campaigns

This allows them to control the alerts that they or members of their team receive, regardless of the default subscriptions that may have been set for the particular object type.

To set default alert subscriptions

1. Select **Settings > Distributed Marketing Settings > Default Alert Subscriptions**.

The **Default Alert Subscriptions** page displays a list of all alerts, grouped by object type.

2. Configure which object access roles should receive which alerts by selecting the appropriate checkboxes.

3. Click **Save Changes**.

About system wide non-work dates

IBM Unica Distributed Marketing allows you account for time where, by default, no work will be done on tasks. Distributed Marketing does not include non-work time in task duration calculations.

You can specify non-work time in date ranges or as single dates.

To add a new non-work date

1. Select **Settings > Distributed Marketing Settings**.

2. In the Other Options section, click **Non-working Business Days**.

   The Non-working Business Days page appears.

3. Enter a start and end date for the new non-work time. Note that the end date defaults to the start date, for easily entering single-date events.

4. Type a name for the non-work time in the **Name** field.

5. Select a type for the event from the **Type** drop-down list.

   ☼ Use the List Definitions page in the Administration section to add non-work time types.

6. Click **Accept**.

   A message appears, reminding you to click Save Changes for your changes to take effect.

   ☼ You cannot add past dates (that is, dates that have already occurred).

7. Click:

   • **Save Changes** to save your changes,

   • **Revert to Saved** to undo your changes and continue editing, or

   • **Cancel** to undo your changes and return the Administration page.

8. If your changes affect any projects, the system displays a summary screen, detailing the projects affected and the name and email address for the project owner.

To remove a non-work date

1. Select **Settings > Distributed Marketing Settings**.

2. In the Other Options section, click **Non-working Business Days**.

   The Non-working Business Days page appears.

3. Select a date or dates from the list.

4. Click **Remove**.

   A message appears, reminding you to click Save Changes for your changes to take effect.

   ☼ You cannot delete past dates (that is, dates that have already occurred).

5. Click:

   • **Save Changes** to save your changes,

   • **Revert to Saved** to undo your changes and continue editing, or

   • **Cancel** to undo your changes and return the Administration page.

6. If your changes affect any projects, the system displays a summary screen, detailing the projects affected and the name and email address for the project owner.

About managing published searches

All IBM Unica Distributed Marketing users have the ability to save any search they perform. After users specify the search criteria, they can save that criteria for later use. As an administrator, you can then publish these saved searches. Publishing a search makes it available to all Distributed Marketing users.

To publish a saved search

1. Select **Settings > Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Published Searches**.

   The Published Searches page opens.

3. In the **Search By User Name** field, select a user who has saved a search to publish.

   The system populates the **Available Saved Search** list box with the selected user's saved searches.

4. Use the **>>** and **<<** buttons to add or remove searches from the **Publish Saved Search** list box.

5. Click **Save Changes** to publish the search(es) listed in the **Publish Saved Search** list box.

   Published searches are available to all users, and they display as folder links on object list pages.

   Notes on published searches:

   • Published searches must have unique names.

   • A private and published search **can** share same name.

   • You cannot delete a published search. To delete, first change it back to private.

To make a published search private

If someone has previously published a search, and it is no longer needed, you can change it back to a private search.

1. Select **Settings > Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **Manage Published Searches**.

   The Published Searches page opens.

3. Use the **<<** button to remove searches from the **Publish Saved Search** list box.

4. Click **Save Changes.**

   Any searches you removed from the Published Saved Search list box are now private, and can be deleted if required.

About list definitions

There are several areas in IBM Unica Distributed Marketing where an administrator can populate or define list values, or options, that a user will choose from.

List types

The following table describes the areas for which an administrator can define these options and where users encounter them in IBM Unica Distributed Marketing.

List type	Description	Location
Non-work Day Types	Categories for your organization's non-work time. For example, national holidays, corporate off-sites, or Company holidays.	When users add an On-demand or Corporate Campaign, they can choose to schedule work during organizational non-work dates.

List type	Description	Location
Roles	Roles make it easier to assign people to tasks. ☼ These are functional roles, as op-posed to security roles that deter-mine access to various areas of the Distributed Marketing interface.	When users add an On-demand or Corporate Campaign, they can assign people to functional roles or roles to tasks.
Workflow Mile-stones	Milestones that can be added to a workflow.	Users can select from the list when specifying a milestone.

List properties screen

Each list type has a screen where you define the entries for the list. Each screen contains the following fields:

Field	Description
Description	Enter a description of the list type. If you do not enter a description, Distributed Marketing provides a default description.
Display	Select Code-Name or Name-Code from the drop-down list to specify whether you want your list options to display by code number followed by name, or by name followed by code number.
Storage Location	Displays the name of the database table where the values for this list are stored.
New or Selected Item	Enter the name and code of the list option. For example, you might call the first option you create for the Business Area Travel and assign a code of 01 to it. The code must be unique. You must click **Accept** to add the list option. It appears in the List Items field when you do so.
List Items	This field is populated with any list options already created. Select one or more items in this field and click the Enable, Disable, or Remove button to the right of this field.

This screen also contains buttons for enabling, disabling, and removing list entries:

Button	Description
Disable	Click if you want to keep the list option (for possible future use, for example), but do not want it to appear on a list. The item will be grayed out in the List Items field, but will not appear in one of the area's drop-down lists.

If you create a list definition, use it, and later disable it, the list definition is still in use for the object you chose it for, but is unavailable for future use. For example, if you create cost category 001 and select it for an invoice line item, but later disable cost category 001, it will no longer appear as a cost category option for use in future invoice line items. |
| Enable | Click if you want the definition to appear as an option in the drop-down list. You can enable a previously disabled option. Enabled options are in regular font.

By default, newly created options are enabled. |
| Remove | Click if you want to remove a selected option from the List Items field and from the drop-down list. An option that is being used in a workflow cannot be removed. |

To add options to a list

As an administrator, you can populate the drop-down fields from which the user chooses a value for Roles, Non-working Date Types, and Workflow Milestones.

1. Click **Settings** > **Distributed Marketing Settings**.

   The Administrative Settings page appears.

2. Click **List Definitions**.

   The List Definitions page appears.

3. Click the area to which you would like to add list definitions.

4. Fill in the fields on the screen.

5. Click **Save** to save your changes.

To enable, disable, or remove a list definition

Once you have created a list definition, it appears as an option in the drop-down list from which the user will choose.

You can also disable previously enabled options, so you can keep the list definition (for possible future use, for example), but do not want it to appear on a list. Removing an option removes it from IBM Unica Distributed Marketing. If you want to add the option again, you have to recreate it.

1. Follow the procedure To add options to a list in Distributed Marketing.

2. From the List Items field, select one or more values to enable, disable, or remove.

3. Click **Disable**, **Enable**, or **Remove** according to the following:

4. Click **Save** to save your changes.

4 Security

About security

You create and manage users and user groups in the IBM Unica Marketing Platform. Then, in IBM Unica Distributed Marketing, you configure security policies that grant those users permissions to access various objects and parts of the product based on access roles.

Distributed Marketing provides security through several kinds of access roles and users are assigned access roles in different ways. For example, you and the other system administrators assign security policy roles to users from the User Permissions page, while people who create Lists, On-demand Campaigns, and Corporate Campaigns specify which users participate in which roles. But no matter how a user obtains an access role, the permissions granted to that role are determined by a security policy and someone who has not been assigned any roles is governed by the default security policy, Global.

About access roles

To support the collaborative features in IBM Unica Distributed Marketing, you can grant varying levels of access to different types of users based on access roles.

There are three types of roles in Distributed Marketing - object instance, template, and security policy - and there are three default security roles that support the Global security policy.

About the default security roles

The default security roles, Field Marketer, Corporate Marketer, and Distributed Marketing Administrator, are included in the system's default security policy, Global. These roles are based on the application access levels for Distributed Marketing in Marketing Platform and they are always in effect.

- If, in the Marketing Platform, you add a user to a user group with the Distributed Marketing Administrator level of access, that user is assigned the Distributed Marketing Administrator access role in Distributed Marketing. By default, Distributed Marketing administrators have access to all administrative and configuration settings.

- If, in the Marketing Platform, you add a user to a user group with the `field` level of access, that user is assigned the Field Marketer access role in Distributed Marketing. By default, field marketers are granted very few permissions.

- If, in the Marketing Platform, you add a user to a user group with the `corporate` level of access, that user is assigned the Corporate Marketer access role in Distributed Marketing. By default, corporate marketers are granted administrative permissions.

You cannot override these role assignments in the **User Permissions** page of Distributed Marketing, and you cannot remove them from the Global security policy. To change the system role assigned a user, you must change their user group assignment in the Marketing Platform.

Remember that changes made to users in the platform are reflected in Distributed Marketing only after the user tables are synchronized. User synchronization occurs programmatically at a regular interval, as specified by a parameter in the `collaborate_config.xml file`. Or, you or another system administrator can invoke the **Synchronize Users** function from the **Administrative Settings** page in Distributed Marketing.

About object access roles

Each List, On-demand Campaign, and Corporate Campaign has a set of access roles.

When users do their work in Distributed Marketing, the system assigns them the appropriate object access role. For example, a person who creates a new Corporate Campaign is the Corporate Campaign owner and the users assigned to the Corporate Campaign's roles are the participants. Object roles for projects and approvals are also called access levels because project participants with the appropriate permissions can also assign object roles to participants (in addition to assigning project roles).

About security policy roles

Security policy roles are exactly that: roles you add to individual security policies. These roles are meant to control access to IBM Unica Distributed Marketing functionality based on a job title or function a user performs for your organization as a whole.

The roles you add to security policies plus the default system roles, are the roles you assign to individual users on the **User Permissions** page.

Security policies and permissions

Security policies are sets of rules that grant or deny user access to objects or parts of IBM Unica Distributed Marketing based on access roles. For example, you can configure security policies that ensure the following.

- Managers have access to all the Lists, On-demand Campaigns, and Corporate Campaigns in their business units.

- Users' access to Lists, On-demand Campaigns, and Corporate Campaigns is based on both their business unit and their job function.

- Only select users can create new Lists, On-demand Campaigns, or Corporate Campaigns.

Any object created in Distributed Marketing is governed by a security policy. The security policy assigned to a new object is usually determined by the template that was used to create it.

Security policies

A security policy is presented as a set of tables, with one table for each object type. The columns represent the access roles and the rows represent permissions, grouped by the object's tabs.

The permissions configured in security policies control access throughout all the functions of IBM Unica Distributed Marketing.

For example, the results of searches are constrained by access rights. If a user does not have access to On-demand Campaigns, these objects are not retrieved by a search.

The security policy in effect at a given time for a given object depends on the security policy specified by the object's template. For example, when template developers create templates, they specify the security policy on the **Template Properties** tab. Then, when instances are created from that template, access to those instances is determined by the security policy specified in the template.

Security policy permissions

Each object type has its own access control table in the security policies. Each table displays access control sections for each tab, with rows that represent individual actions such as add, edit, delete, view, and so on. To configure permissions, you click the table cell that represents the intersection of an access role and a permission setting. Clicking in the cell toggles through the following settings:

Symbol	Name	Description
Check	Granted	Grants users in the role access to the function.

Symbol	Name	Description
X	Blocked	For system and security policy roles only, denies users in the role access to the function. (You cannot block functions by object roles.)
Blank	Inherited	Users in the role inherit the permission setting for the function either from their other project and object roles, or, if none of those have the permission specified, the appropriate default system role from the Global policy. If none of the roles they qualify for grants them permission, they are unable to perform the function.

If a user qualifies for more than one role, his or her access rights are cumulative. For example, if a user's security role grants different permissions than does his or her current project role, that user's access rights include all permissions from both roles.

The Global security policy

The Global security policy acts as the system's default security policy. The term "global" does not indicate that every user has global or full access to everything, but rather that this security policy is, by default, associated globally with every user. You can create additional security policies that extend the Global policy, but the Global policy is always in effect, regardless of any other security policies you create.

The Global policy:

- Applies to anyone who logs in to Distributed Marketing

- Cannot be disabled

- Supersedes all other policies. The Global policy security role a user qualifies for is always taken into consideration when the system determines access rights.

- Contains permission settings for the default system roles, Distributed Marketing Administrator, Corporate Marketer, and Field Marketer. The access settings for these roles are used as the fallback or default for any user who does not currently qualify for an object or security policy role.

Planning security policies

Before you begin configuring security policies, determine the security needs of your organization and then plan your security strategy.

First, determine how many security roles and project roles you need. Then, determine whether you need to create multiple security policies or whether you can simply modify the Global policy to meet your needs:

- If all the business units in your organization follow the same rules, or, you can implement the appropriate differences in access through a combination of project and security roles, it makes sense to implement one security policy – a modified Global policy. You can add as many security roles as necessary to the Global policy.

- If there are many functional groups in your organization that require very different types of access, leave the Global policy in its default state and add new security policies for each group of users.

As a best practice, try to implement the smallest number of security policies possible. Within a single security policy you can configure different permissions for each object type.

When you set up permissions for the roles, remember that the individual permission settings are granular. For example, if you want users in a particular role to be able to edit the **Summary** tab of a project, you must grant that role both **Edit** and **View** permissions. If you forget to select **View** permissions, users in that role will never see the **Summary** tab so their permission to edit it is useless. In another example, it would not make sense to grant permission to post messages without also granting permission to read them.

About configuring security policies

After you have determined your security strategy, you configure and/or create the appropriate security policies and roles and then specify to which users the people with those roles can assign project roles and access levels.

To edit the Global security policy

You must have administrative permissions to complete this task.

1. Select **Settings > Distributed Marketing settings**.

   The Administrative Settings page opens.

2. Click **Security Policy Settings**.

   The Security Policy Settings page opens.

3. Click **Global**.

   The Properties page opens.

4. To add a role:

   a. Click the Add icon ( ).

   A line is added for the new role is added at the end of the list of roles.

   b. Enter a name and description for the new role.

   Repeat these steps for each role you need to add.

5. Click **Save and Edit Permissions**.

   The Permissions screen opens. By default, permissions for Lists are displayed.

6. Modify permissions for Lists as needed.

   To change a permission for a specific role that is part of the Global security policy, click in the field that is in the column for that role, and the row for that function. The field toggels between:

   - A check, to enable that function for that role

   - An X, to disable that function for that role

   - A blank field, to indicate that the permission is inherited.

7. To change the permissions for On-demand Campaigns or Corporate Campaigns, select that option from the **Access to** drop-down list.

   The list of permissions changes to reflect the type of object you select. Modify permissions as you did in the previous step.

8. When you have set permissions for all object types, click **Save Changes**.

To create a new security policy

You must have administrative permissions to complete this task.

1. Select **Settings > Distributed Marketing settings**.

   The Administrative Settings page opens.

2. Click **Security Policy Settings**.

   The Security Policy Settings page opens.

3. Click the Add icon ( ).

   The Properties page opens, with rows for two roles.

4. Enter a policy name and description.

5. Enter a name and description for the two automatically created roles.

6. To add a role:

   a. Click the Add icon ( ).

   A line is added for the new role is added at the end of the list of roles.

   b. Enter a name and description for the new role.

   Repeat these steps for each role you need to add.

7. Click **Save and Edit Permissions**.

   The Permissions screen opens. By default, permissions for Lists are displayed.

8. Modify permissions for Lists as needed.

To change a permission for a specific role that is part of the Global security policy, click in the field that is in the column for that role, and the row for that function. The field toggels between:

- A check, to enable that function for that role

- An X, to disable that function for that role

- A blank field, to indicate that the permission is inherited.

9. To change the permissions for On-demand Campaigns or Corporate Campaigns, select that option from the **Access to** drop-down list.

   The list of permissions changes to reflct the type of object you select. Modify permissions as you did in the previous step.

10. When you have set permissions for all object types, click **Save Changes**.

To assign security roles

When you have finished adding security roles to security policies, assign the roles to the appropriate users. If a user is not assigned a security role, the system uses the Global policy to determine the user's access rights.

You assign security roles directly to individual uses from the **User Permissions** page.

1. Select **Settings > Distributed Marketing Settings**.

   The Administrative Settings page opens.

2. Click **User Permissions**.

   The User Permissions page opens.

3. In the **User Permissions** page, expand the user group that the user belongs to and select the user. The **Properties** page opens.

4. In the **User Role Assignments** section, in the **Available Roles** list box, expand the security policy with the security role you want to assign this user.

5. Select the security role and use the arrow button to move it from **Available Roles** to **Selected Roles**.

   Assign as many roles as necessary, but remember that it is best practice to assign one security role only from a single security policy.

6. Repeat steps 3 through 5 for each user.

7. Click **Save Changes**.

   The role appears under the Assigned Role(s) column in the User Permissions screen.

About controlling access to templates

As described in the sections about security policies, you use permissions in security policies to control the following kinds of access:

- Based on their security roles, which users can create new Lists, On-demand Campaigns, and Corporate Campaigns

- Based on their security roles, which users are allowed to view and interact with items that others create but not to create things themselves

You also use security policies to specify which templates a user can select when creating a new item.

When a template developer creates a template, the **Summary** tab includes one or more security policy fields. The value specified in the security policy field determines which users can access the template; if you don't have a security role that grants you the ability to create objects of that type in the security policy assigned to the template, the template does not appear in your template list when you create an object of that type.

5 Templates

- About templates
- About template components
- About creating templates

About templates

A template is a definition of a List, On-demand Campaign, or Corporate Campaign that corporate and field marketers use to create new objects.

As an administrator, you create templates and specify various parts of the object. For example, among the many settings you determine for a Corporate Campaign template are:

- The associated flowchart in Campaign

- Team members

- Workflow

- Custom tabs

All Lists, On-demand Campaigns, and Corporate Campaigns are based on a template you create, and the object inherits all settings from the template. Corporate or field marketers can change the object's settings as needed.

Why use templates?

Templates are the required building blocks for Lists, On-demand Campaigns, and Corporate Campaigns. Users cannot create these objects without templates.

By using templates, you help users save time because they do not have to configure objects from the beginning; they only need to change settings that are specific to the List or campaign.

For example, if your organization is running multiple Corporate Campaigns that have the same team members and workflow, you can create a template with the right settings for the team and workflow. Corporate marketers then create the Corporate Campaigns based on this template, and do not have to configure the team members or workflow.

About template components

Templates are made up of other components that you, as the administrator, create and manage.

Specifically, templates can include the following:

Component	Description
Tabs	Individual screens for the campaign. Tabs contain one or more forms.
Forms	Sub-section of a tab, containing fields.
Field	Data element contained within a form. Each field has a specific format; some fields, for example contain text, and others contain a set of radio buttons. You can place fields into groups, and display them in either a 1- or 2-column layout.
Data mapping	Mappings of data between Distributed Marketing and Campaign.
Icons	Small images representing the object within the Distributed Marketing user interface.
Attachments	Files or folders appearing on the Attachment tab of the List, On-demand Campaign, or Corporate Campaign.
Custom links	Hypertext links appearing on selected tabs.
Workflow	The set of stages and tasks appearing in the project's workflow tab.

About creating templates

You create a template by assembling existing components. Therefore, as you set up your system, you must create the other components before you can create templates.

Planning your templates

Before you begin building templates, you must analyze your organization's needs, then decide on the templates you need.

For example, your organization might run three very different types of On-demand Campaigns, with different target selection criteria and different workflows. You most likely need three different templates for these On-demand Campaigns.

In addition to planning the number and types of templates, you must plan for the types of objects you need in those templates. For example, the three On-demand Campaign templates you need can share the same Summary form, but require different Selection Criteria forms and Workflows.

Planning template contents

Once you have planned the types of templates you need, you must determine the contents of those templates; that is, you must decide which fields to include, and how to organize those fields.

You should capture this information on paper or in a spreadsheet, then use the Forms Editor to define the tabs and fields you need.

For example, you might determine that an On-demand Campaign template must include a field for the business unit that requests the campaign. You could list the requirements for this field as follows:

Field Attribute	Value
Internal Name	Business Unit
Display Name	Business Unit
Tab/grouping	In the Summary tab under the Collateral Request Info section
Input field type	Single-Select
Possible values or database table to retrieve values from	Retail Banking, Investment Services, Insurance, Credit Card Brochure, Postcard, DataSheet, Intro Folder, White Paper, Print Ad, or a table name or column name where Distributed Marketing should look up these values.
Required field/error message if missing	Business Unit is a required field.
Help Tip	Enter the business unit requesting this collateral piece.

As a best practice, create a similar table for each field you require, before you begin creating fields and tabs in the Forms Editor.

Before creating templates

Templates depend on the existence of other, lower-level components. Therefore, you must set up the following objects before you set up templates:

1. Forms

2. Icons

3. Data Mapping

4. Workflows

5. Roles

6 Working with Templates

Template Configuration page

Use the Template Configuration page to create and manage templates and template components. To display the page, select **Settings** > **Distributed Marketing Settings**. Then click **Template Configuration**.

The items and functions available are organized into two sections, **Template Configuration** and **Template Components**. There is also a button to validate all templates.

Validating templates

You can click **Validate Templates** to run a utility that validates templates and forms and displays any validation errors.

Template Configuration section

The template configuration section of the page contains the link **Templates**, which opens a page that lists all the existing templates and template folders. You use the links on that page to create, delete, and organize templates.

Template Components section

The template components section of the page contains the following links.

Link	Description
Forms	Opens a list of the forms and displays the following information: • File names of the forms definition file • List of templates that use the form Click the Add icon( ) to add a new form.
Workflow	Opens a list of the workflow templates and displays the following information. • Name • The number of stages and tasks in the workflow template • When it was first created and last modified • Whether it is enabled or disabled You create workflow templates from the Workflow tab of a List, On-demand Campaign, or Corporate Campaign template or instance. You can use the links on this list page to delete, enable/disable, import, or export a workflow template.
Data Mapping	Opens a list of data maps and displays the following information. • Data mapping file names • Type; Campaign data • List of templates that use the mapping. • Click the Add icon( ) to add a new data mapping.
Icons	Opens a list of icons and displays the following information. • Icon images; large and small • Icon name • List of templates that use the icon • Delete link for deleting the icon (does not delete the file from its location on disk) Click the Add icon ( ) to add a new icon.

Templates Definition page

Use the links and commands on the Templates Definition page to work with templates.

From this page, you can perform the following actions:

Action	Description
Edit	Click the template name to edit the template.
Enable or disable	Click the link to toggle the state of the template, from **Enabled** to **Disabled** and back. When a template is enabled, you can use it to create an object.
Delete	Click to delete a template from the system. The link is only available for templates that do not have any objects created from them.
Add	Click the Add icon ( ) to add a new template. From the icon's drop-down list, select the type of object for which you want to create the template.
Open folder	Click the folder name to open the folder.
Jump to Folder	Click **Jump to Folder** to navigate to and open another template folder.
Move items	Select the items to move, then click the Move Items icon ( ) to display a screen where you can choose a new folder for selected items.
Add folder	Click the Add Folder icon ( ) to create a new template folder.

To build a template

Before you create templates for Lists, On-demand Campaigns, and Corporate Campaigns, determine whether you must add custom tabs. If you do, see the chapter on the Forms Editor and use the procedures in that chapter to create forms for custom tabs.

When the template components you need are available, create a new template and assemble the pieces. The steps to create a template are generally the same for each object type.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

   The Administrative Settings screen opens.

2. Click **Templates**.

   The Template Configuration Screen opens

3. Click the Add icon ( ).

4. From the icon's drop-down list, select the type of object for which you want to create a template.

5. Use the information provided in the rest of this chapter to determine how to fill out each of the tabs for this template.

> 🔋 When assembling a template, click **Save Changes** when you have finished editing a tab, before navigating to another tab in the template. Otherwise, your changes are not saved.

Effects of template changes

When editing a template, be aware you are changing all instances of objects previously created from the template.

The exceptions are workflow, people, or an attachment. When you change the workflow template, add or remove roles, or add or remove an attachment, your changes apply only to objects you create after the changes are made. Existing workflows are not changed, nor are roles or attachments for any existing Lists, On-demand Campaigns, or Corporate Campaigns.

About template folders

You can create folders for templates in the Templates Definition screen.

You can move templates to any existing folders.

To edit a template

Template editing is spread across the following tabs. Depending on the object type, only a subset of these tabs may be available.

- **Properties**: basic template properties, such as name and description.
- **People**: roles definition.
- **Campaign**: IBM Unica Campaign integration settings (Corporate Campaign templates only)
- **Recurrence**: recurrence settings.
- **Workflow**: workflow settings (not available for simple Lists).
- **Tabs**: Tab definitions; add additional forms and custom tabs.
- **Attachments**: files attached by default to all objects created from the template.
- **Custom Links**: custom links to programs, web pages, etc.

1. Click **Settings > Distributed Marketing Settings**.

2. In the **Administrative Settings** screen, select **Template Configuration** (located under **Other Options**).

3. Select **Templates**.

4. Select the name of the template you want to edit.

    The Properties tab of the selected template appears. You can edit fields on any of the object templates tabs; click a tab in the menu bar to navigate to it.

5. Click **Save Changes** to save any changes you made to the template.

Template Properties tab

For all objects, the templates **Properties** tab contains the following settings.

Property	Description
Name	The template's display name, used in the **Templates list** page.
Description	Short description of the template that displays on the template selector page when adding a new List, On-demand Campaign, or Corporate Campaign.
Icon	Large and small icon images for the template. The large icon is displayed when you create a new object based on this template. The small icon is displayed next to the icon name in the list page.
Security Policies	List of security policies that determine which users have access to the template.
Template ID	Internal name for the template. Avoid spaces and special characters. Note the following. • Template IDs must be unique across Distributed Marketing. Additionally, once you use a template ID, you cannot use it again, even if you delete it. • Once created, you can edit this field only if no objects have been created based on this template.
Default Name	The default name given to an object (project, marketing object, etc.) created using this template. You can leave this field blank if you wish.

Property	Description
ID Prefix	Prefix for the object's external ID. Each List, On-demand Campaign, and Corporate Campaign has an external ID assigned to it. For example, you could enter an ID Prefix of `TRS` for the Tradeshow On-demand Campaign template. The first tradeshow On-demand Campaign you create would then have an ID of `TRS1001`.
	You can set the ID prefix by template, to easily determine the template on which an object is based.
ID Generation Class	Java class to specify a numbering algorithm for objects. By default, Distributed Marketing assigns a sequential number to each object.
	However, you can configure Distributed Marketing to use an algorithm defined by you to set the external ID. If you choose to do this, the ID Generation Class specifies the Java class used to generate the code. You must edit this attribute only if you want to generate IDs according to an algorithm other than the default.

Template People tab

You use the People tab of a template to define roles that are added to Lists, On-demand Campaigns, or Corporate Campaigns created from this template.

You must define list definitions for roles before adding roles to a template.

To add a role, select a role from the drop-down list. The available values are populated from the list definitions.

To delete a role, click **Remove** next to the role you need to delete.

Template Recurrence tab

You use this tab to establish properties for a recurring campaign. Recurring campaigns reference a basic workflow; you can set up recurrence properties to define how many times the basic workflow should recur.

Note that this tab appears in both templates and in the actual instance of a Corporate Campaign, On Demand Campaign, and List. When creating a template, you can access this tab only after you have created a Workflow template.

Depending on permissions, users can modify recurrence properties when they create or edit a Corporate Campaign, On-Demand Campaign, or List. If they do so, all tasks in the workflow are replaced by new tasks, with dates that are calculated based on the new recurrence properties.

The Recurrence tab contains the following settings:

Property	Description
Campaign Work-flow Type	Specifies whether the workflow used by the Corporate Campaign, On-Demand Campaign, or List contains a recurring stage. Options are: • Nonrecurring • Recurring If you select Recurring, the properties on this tab are applied to the stage in the Workflow that is marked for recurrence. ☼ Note that Recurrence properties you set up here can apply to only a single stage of a workflow.
Frequency	Specifies the recurrence pattern. Options are: Daily—Occurs on a daily basis. When you select Daily, you must specify the number of days between each occurrence of the workflow or workflow stage. Weekly—Occurs on a weekly basis. When you select Weekly, you must specify the number of weeks between each occurrence of the workflow or workflow stage. (To specify every other week, enter 2 for the number of weeks between each occurrence.) You must also specify the day or days of the week on which the occurrence should take place. Monthly—Occurs on a monthly basis. When you select Monthly, you must specify the number of months between each occurrence of the workflow or workflow stage. You must also choose one of these options: • Each date of month—Choose this option if you want the occurrence to take place on a specific date each month. • Each day of week—Choose this option if you want to schedule the occurrence to run on a specific day of a specific week each month. For instance, if you want to run the campaign monthly, on the third Thursday of each month, you should select this option. Keep in mind that your calendar options apply to your recurrence schedule; that is, the recurrence schedule is built using your settings for valid working days.
Ending	Specifies the total number of occurrences of the workflow or workflow stage. You can also choose to specify a date by which the recurrence should end.
Permissions to modify the recur-rences in the in-stance	Allows you to specify the recurrence options that can be changed in each Corporate Campaign, On-Demand Campaign, or List. This field appears only in the Corporate Campaign, On Demand Campaign, or List template; it does not appear in the actual instance of the Corporate Campaign, On-Demand Campaign, or List. Options are: • All options—Users can change all recurrence options. • No options—Users cannot change any recurrence options. • All options but frequency—Users can change all options except frequency.

Template Workflow tab

The **Workflow** tab of a template is similar to the workflow spreadsheet displayed in an individual List, On-demand Campaign, or Corporate Campaign. Use the **Workflow** tab to set up the stages, tasks, and so on that are common for all Lists, On-demand Campaigns, or Corporate Campaigns created from the template. Then, List, On-demand Campaign, or Corporate Campaign owners use the workflow spreadsheet to modify the workflows as necessary for their projects.

Like the workflow spreadsheet, the template Workflow tab has two modes: view and edit. To edit the workflow displayed on the tab, click the **Edit** link.

You can save a workflow as a template from either the List, On-demand Campaign, or Corporate Campaign template **Workflow** tab or from the workflow spreadsheet in an individual List, On-demand Campaign, or Corporate Campaign.

To create workflow templates

To create workflow templates, you start by creating a List, On-demand Campaign, or Corporate Campaign template. When you are finished configuring the workflow for the template, you save the workflow as a template.

A workflow template retains the stage and task definitions.

1. Select the **Workflow** tab of the appropriate List, On-demand Campaign, or Corporate Campaign template.

2. While the tab is still in view mode, click the Save as Template icon ( ).

3. Enter a descriptive name for the template and click **Continue**.

4. Click **Save Changes**.

   The workflow is saved as a template in the template library.

To use workflow templates

1. Create the List, On-demand Campaign, or Corporate Campaign template as usual, but skip setting up roles because they are imported with the workflow template.

2. Select the **Workflow** tab.

3. While the tab is still in view mode, click the Import Template icon ( ).

   A warning appears stating that the import will overwrite the existing workflow.

4. Click **OK**.

   A list of templates appears.

5. Select a template from the list and click **Import**.

The workflow appears in the tab and the roles referenced in the task and stage rows are now listed on the People tab.

6. If you need to modify or add stages or tasks, click **Edit**.

   Then customize the workflow as necessary for the project template. Remember to save your changes.

7. When the workflow is complete, click **Save and Finish** to return to view mode.

To configure workflow for a template

To configure the workflow for a List, On-demand Campaign, or Corporate Campaign template, you create the template, specify the roles, and then create the workflow.

1. Select **Settings > Distributed Marketing Settings**.

2. Click **Template Configuration**.

3. Under Templates, click the Add Template icon ( ).

4. Complete the fields in the **Template Properties** form and click **Save changes**.

5. Use the **People** tab to specify the roles of the participants and click **Save changes**.

6. Select the **Workflow** tab and click the Edit icon ( ).

7. Add the appropriate system and user tasks, and stages.

   Remember to save frequently.

8. When the workflow is complete, click **Save and Finish**. The tab returns to view mode.

9. Optionally, click the flowchart button to display the workflow as a process flowchart.

Template Campaign tab

You use this tab in a Corporate Campaign template to set up communication between Distributed Marketing and Campaign. This tab is not available for On-demand Campaigns and Lists.

It contains the following settings:

Property	Description
Campaign Service URL	The URL used to start Campaign. For example: `http://engsvr1:9001/Campaign/services/CampaignServices` Distributed Marketing uses this value to access services provided by a Campaign server when you create a linked campaign. ☼ Enter a value here only if you are mapping data between Distributed Marketing and Campaign.
Campaign Data Mapping	The XML file containing the data map for creating a Campaign campaign from a Distributed Marketing object instance.
Options	A single checkbox, **Use Campaign Code Generated by Campaign**. Check this box to force Campaign and Distributed Marketing campaign codes to match.
Partition ID	The Partition ID identifies the partition of the Campaigninstance containing the linked campaign. The default value is `partition1`, which is correct if Campaign is installed to a single partition. If Campaign is installed on multiple partitions, you can specify the partition to use for creating campaigns. If you leave this field blank, Distributed Marketing obtains the partition ID from the `defaultCampaignPartition` parameter in `collaborate_config.xml`.
Folder ID	The folder ID where data where Campaign stores campaigns created from within Distributed Marketing. This ID comes from the Campaign `UA_Folder` system table. You must set up this system table in Campaign before you define it here.

Template Tabs tab

Use this tab to add forms to the Summary tab and create custom tabs. For example, you could create a custom tab called **Printing**, where you want users to specify information about the outside vendor that they plan to use to get the collateral printed. In this tab, you could add a drop-down list that allows users to select a printing company from a list of several vendors. You could also add a text box that allows users to enter the quoted price of each page of the collateral.

Tab Page Style

Select **summary** to add additional forms to the bottom of the Summary tab. Typically, you select this option for forms containing a relatively small amount of data that you want users to see on the Summary tab when they first open the object.

Click **tab** to specify that the tab's contents should appear on a separate tab. Use this option for forms, or groups of forms, that require their own page, as in the **Printing** tab example.

Tab Visibility

Click **Show in Wizard** to make the tab visible in the new object wizard in IBM Unica Distributed Marketing. If you leave this unchecked, the tab does not display when you create a new object using the wizard, but appears once you save the object.

To add a tab to a template

1. Navigate to the template's Tabs page.

2. Click the Add a Tab icon ( ).

3. Enter a descriptive name for the tab in the **Name** text box.

    The name you choose becomes the name of the tab in objects created from this template.

4. Choose whether to show the form on the **Summary** tab or its own custom tab.

5. Select a form from the **Form** pull-down list.

    This list contains all the forms available in IBM Unica Distributed Marketing.

    ☼ For List templates, forms of type Campaign are not listed.

6. Select the visibility options for the tab.

7. Click **Save Changes** to save the tab, or the Add a Tab icon ( ) to add another tab.

To move a tab or form on a template

1. Navigate to the template's Tabs tab.

2. Click one of the following buttons after **Move**:

    *   **Down** to move a tab down. Moving a summary tab down places it lower on the object's **Summary** page. Moving a separate tab down places it further to the right in the tab list. For example, if the tab was fourth in the list, moving it down once makes it fifth.

    *   **Up** to move a tab up. Moves it up or forward one position.

    ☼ Summary tabs must come before non-summary tabs.

To delete a form or custom tab from a template

❗ Deleting a form or custom tab from a template deletes it from all existing objects created from the template. Do not delete a form or custom tab from a template that has already been used to create items. If you do, data will be lost.

1. Navigate to the template's Tabs page.

2. Scroll to the section that defines the form or custom tab you want to remove and click **Delete** (located on the right side of the page).

    The form or custom tab is removed from the object template.

3. Click **Save Changes**.

Related Topics

  • About invalid forms

Template Attachments tab

You can store attachments with a template, so that whenever an object is created from the template, certain images or documents are attached to the object by default.

Use this tab to perform the following actions.

• Add one or more attachment folders to organize attachments; use the **Add a Folder** link.

• Attach one or more files to the template.

• Move folders up or down in the list; use the **Up** and **Down** links to reorder attachment folders.

• Delete default attachments; click the **Delete** link next to the file you want to remove.

• Delete folders; click the **Delete** link next to the folder you want to remove. Note that all attachments under the folder are also deleted.

1. Navigate to a template's **Attachments** page.

2. Click the **Add an Attachment** link next to the folder to contain the asset.

    The **Upload Attachment** dialog appears.

3. Enter the filename and path or use the **Browse** button to locate the attachment.

4. Click **Save Changes** to attach the file.

    The attachment file appears in the list under its folder.

5. On the Attachments tab, click **Save Changes** to save the new default attachment.

    Repeat the steps to add as many attachments as needed.

Template Custom Links tab

Use this tab to create custom links that appear on one or more tabs for the object created from this template. For example, you may want to link to an application that your organization uses to generate ID codes for collateral pieces or direct marketing offers.

When adding parameters, the screen contains a series of pull-down menus. The choices you make in one list determine the choices available from the subsequent list. This screen contains the following properties.

Property	Description
Name	Enter a name for the link. This value becomes the name of the link.
ID	Enter the unique internal ID of the custom link.
Description	Enter some descriptive text for the link This text is shown on the mousover for the link.
URL	Enter the URL to open when users click the link.
Add a Custom Link icon ( )	Click to add a new link; a new group of fields appears. To add the link, fill in the fields and click **Save Changes**.
Add Parameter	Click to add a parameter to the custom link. Name and Value fields appear. Depending on your selections, new name/value field pairs appear. IBM Unica Distributed Marketing looks for a question mark(?) at the end of the URL and places the parameters after the question mark. If it does not find a question mark, it appends one to the end of the URL and then adds the parameters.
Delete (link)	Click to delete a custom link. This link appears next to the **Add Parameter** link for the link that you are deleting.
Delete (parameter)	Click to delete a parameter for a custom link. This link appears next parameter you are deleting.
Up Down	If you have more than one custom link, use the **Up** and **Down** links to reorder the custom links.

Workflow templates page

Use the **Workflow templates** page to import, export, delete, enable, or disable workflow templates.

To edit workflow templates, use the **Workflow** tab of a project template. That is, import the workflow template into a project template, edit the workflow, and then re-save the workflow template.

Workflow templates fields and functions

The **Workflow templates** page lists all the workflow templates and presents the following information and functions.

Item	Description
Name	The name of the workflow template.
Stages/Tasks	The number of stages and tasks in the workflow, separated by a '/' character. For example, this column's value for a workflow that has 5 stages and 30 tasks is **5 / 30**.
Created Date	The date the template was created.
Last Modified Date	The date of the most recent change made to the template.
Status	Whether the template is enabled or disabled. When a workflow template is created, its status is set to Enabled by default.
Export	A link that enables you to export an individual workflow XML file. You can then import it into another IBM Unica Distributed Marketing system.
Import icon ( )	A link that enables you to import an individual workflow XML file, typically one that was exported from another IBM Unica Distributed Marketing system.
Delete icon ( )	A link that allows you to delete selected workflow templates.
Enable/Disable button	Marks the selected templates as enabled or disabled. A disabled workflow template cannot be selected from a List, On-demand Campaign, or Corporate Campaign template.

To export a workflow template

You can export individual workflow templates. You may want to edit the exported XML file, then re-import the workflow template back into IBM Unica Distributed Marketing.

1. Select **Settings > Distributed Marketing Settings**.

2. Click **Template Configuration**.

3. Click **Workflow**.

4. Click the **Export** link for the workflow you want to export.

5. Choose a location to save the XML file, and save it.

6. Open the file with a text or XML editor, make your changes, then save the file.

7. Navigate back to the templates library (**Settings > Distributed Marketing Settings**).

8. Click the Import Workflow Template icon (   ) and browse to your edited XML file.

9. Name the file to differentiate it from the previous version.

   For example, if you export `Marketing Collateral`, you could name your edited file `Marketing Collateral 2`. (Note that you can always rename the file later.)

10. Create a new template and use the new workflow; or open an existing template and replace the old workflow template with the new one.

Data Mapping Definitions page

The **Data Mapping Definitions** page allows you to map data between objects in Distributed Marketing and campaigns in Campaign. Use the **Data Mapping** link from the **Template Configuration** page to configure data mapping.

The Data Mapping Definitions page contains the following columns:

Column	Description
Name	The name of the data mapping file.
Type	**Campaign Data**: maps Distributed Marketing attributes to Campaign attributes. If you have map files from previous versions, you may see other values in the Type column.
Used By	A list of templates that use this data map.

☼ You cannot create a map file within Distributed Marketing; use a text or XML editor to create and edit the necessary map files.

The **Campaign Service URL** field on the Campaign tab in a Corporate Campaign template behaves as follows:

• If it is blank, data mapping does not occur.

• If it contains information, the value in the field is used to map data between Distributed Marketing and Campaign.

To add a data mapping

Use a text or XML editor to create or edit a data mapping file. After you have a data mapping file, you add it to Distributed Marketing using the following procedure.

1. Select **Settings** > **Distributed Marketing Settings**.

2. Click **Template Configuration** > **Data Mapping**.

3. Click the Add a data mapping icon (   ).

   The Upload Data Mapping dialog box appears.

4. Enter a name.

   This is the display name for the data mapping file.

5. Browse to the XML file that defines the data mapping.

6. Click **Continue**.

To edit a data mapping

If you want to update a data mapping file, you must first edit the XML file, and then re-load it back into Distributed Marketing.

1. Open the data mapping XML file in a text editor and make your changes.

2. Select **Settings > Distributed Marketing Settings**.

3. Click **Template Configuration > Data Mapping**.

4. Click the file name you are updating.

   The Update Data Mapping dialog box appears.

5. Select **File**, and browse to the XML file.

6. Click **Continue**.

   You will be prompted to overwrite the existing file.

7. Click:

   • **Save** to overwrite the existing file with the newer version, or

   • **Cancel** to leave the previous version of the file.

Icons page

The **Icons** page allows you to view and add icon files. These icons are displayed in various sections of Distributed Marketing, and for object templates you choose.

Use the **Icons** link from the **Template Configuration** page to manage icons used in object templates.

The **Icons** page contains the following columns:

Column	Description
Image files	A large and small image for each icon. Click the images to change the icon name or the image files.

Column	Description
Name	The name of icon.
Used By	A list of object templates that use this icon.
Delete	A link to delete the form. This link is only available for icons that are not used in any templates.

When you specify icons, specify two image files for each icon:

- **Main icon**: the large image is displayed when a file of this type is presented in the system. For example, the main icon is shown in the List, On-demand Campaign, or Corporate Campaign selector (the dialog box that appears when you create a List, On-demand Campaign, or Corporate Campaign; you select from a list of templates).

- **List** icon: the small image appears on the object list page. For example, the List, On-demand Campaign, or Corporate Campaign list page contains the list icons for all List, On-demand Campaign, or Corporate Campaign on the page.

To add or edit an icon

1. From the **Settings** menu, select **Distributed Marketing settings**.

2. Click **Template Configuration**.

3. Click **Icons**.

   The **Icons** list page appears.

4. Click:

   - The Add an Icon icon (at the top right section of the page, to add an icon, or

   - An icon image (large or small) to edit an icon.

   The **Update Icon** dialog appears.

5. Type or edit the name of the icon.

   ☼ If you are updating an existing icon's name only, do not check the box next to the **File** or **List Icon Image File** labels and skip step 6. If you want to update either image, check the box corresponding box and continue to step 6.

6. Enter file names for the icon images:

   - Navigate to a main image file using the **Browse** button of the **File** field to add or change the main image.

   - Navigate to a list image file using the **Browse** button of the **List Icon Image File** field to add or change the list image.

☼ Distributed Marketing is installed with a set of default icons; you can choose
from these icons, or add icons customized for your organization. File images
have a maximum size of 46 x 54 pixels. List icon images a maximum size of 20
x 24 pixels.

7. Click **Continue** to load the files into Distributed Marketing, or **Cancel** to abort the
upload:

8. Click **Save Changes** to confirm the upload, or **Cancel** to abort the upload.

The new or edited icon appears in the list.

About importing and exporting templates

The template import/export functionality allows you to:

• Export templates into a self-contained archive, and

• Import templates that have previously been exported or saved to a self-contained
archive.

Specifically, the export command downloads a ZIP archive to the your computer; import
uploads a ZIP archive to the Distributed Marketing server.

You can use the import and export commands to create a portable archive. For
example, you can export all of your templates from a test server after you have verified
they work correctly, then import them to a production server.

To import templates

You can use the import button to import workflow templates that were created in the
same version of Distributed Marketing that you are using. To import templates from an
earlier version of Distributed Marketing, you must upgrade.

1. From the **Settings** menu, select **Distributed Marketing Settings**.

2. Click **Template Configuration**.

3. Click the Import icon ( ).

The **Import Templates** dialog appears.

4. Enter the path name of the template archive you are importing, or navigate to it
using the **Browse** button.

5. In the **Update Database** section, choose which database scripts to run:

• Drop Lookup Tables

• Create/Update Lookup Tables

Checking all the boxes will fully import the template. However, you will lose
whatever data you had if you are re-importing some templates.

☼ If you are concerned about overwriting data, you can examine the SQL script files in the template archive to see the details, and create the necessary tables and columns manually.

6. Click **Continue** to import the selected template(s).

   A summary page appears, detailing templates being imported, and any warnings about current template files that will be overwritten.

7. Click:

   • **Save Changes** to import the templates, or

   • **Cancel** to abort the import, and avoid overwriting any existing templates.

   The system reads the template files and analyzes them, and reports any errors. Imported templates are saved to the template database, then all available templates are reloaded from the database.

☼ The archives containing the example templates are located in the `\tools\admin\` folder under your Distributed Marketing installation. Use the archive for your database type. (For example, use `sample_templatesDB2` if you are using a DB2 database.)

About exporting templates

If you have created or edited a group of templates on a development or test Distributed Marketing server, you could export them, and then import them to a production server.

The template export feature in Distributed Marketing allows you to export a group of templates or a single template. In either case, the system creates a self-contained ZIP archive; you can use this archive to import the templates to another Distributed Marketing server.

Export creates separate SQL scripts. This gives you more control over updating your database to work with the new templates when you import them. For example, if you need to add a column here or there, you can run only the create/alter scripts, so as not to needlessly delete tables and existing data.

The system generates the following script files (to use when you import the template archive)

File	Description
createlkup.sql	Adds columns to existing lookup tables, and creates new lookup tables needed for the templates.
droplkup.sql	Deletes existing lookup tables used by the templates. If you do not mind possibly deleting data, you run this script before createlkup.sql to ensure the database is set up correctly.

File	Description
insertlkup.sql	Inserts data into the lookup tables. This makes it possible to save complete lookup tables (schema plus data) with the template archive.

To export a group of templates

1. From the **Settings** menu, select **Distributed Marketing Settings**.

2. Click **Template Configuration**.

3. Click the Export icon ( ).

   The **Export Templates** dialog appears.

4. Select the **Database Type** from the pull-down list.

   This determines the format of the SQL script files generated with the exported templates.

5. Click:

   • **Continue** to export the templates, or

   • **Cancel** to abort the export; skip the remainder of the instructions.

6. Click **Open** or **Save** from the File Download dialog that appears.

   The system creates a ZIP archive containing the template and SQL script files.

To export a single template

1. From the **Settings** menu, select **Distributed Marketing Settings**.

2. Click **Template Configuration**.

3. Click **Templates**.

4. Click the name of the template to export.

   The template's **Properties** page appears.

5. Click the Export icon ( ).

6. From the Export Template dialog, select the **Database Type** from the pull-down list.

   This determines the format of the SQL script files generated with the exported template.

7. Click:

   • **Continue** to export the template, or

   • **Cancel** to abort the export; skip the remainder of the instructions.

8. Click **Open** or **Save** from the File Download dialog that appears.

The system creates a ZIP archive containing the template and SQL script files. Open or extract the ZIP file to view the SQL scripts.file.

About template validation

You can perform two types of template validation:

- Database validation

- Attributes validation

You can perform validation at any time by clicking the **Validate Templates** link on the Templates Configuration page. Additionally, the system performs certain validation automatically as described in the following sections.

About database validation

Database validation checks:

- The validity of the database schema, and

- Whether form attributes match their data type in the database.

Notes about database validation:

- The system performs this type of validation on import, upgrade, and export of templates. For export, only forms not linked to any template are validated.

- On import and upgrade, you can save templates even if invalid. You will receive warnings, but can still save.

- When adding a form, you cannot save the form if validation finds any errors.

About attribute validation

Templates attributes type validation checks whether two form columns from two templates point to same table column but with different type (for example, one has a type of select and the other is multi-select).

If two or more form attributes with different types point to the same table column, the system generates an error describing the inconsistency.

7 Form Editor

About the Form Editor

You use the Form Editor to create and edit template components. Forms capture information about the List, On-demand Campaign, or Corporate Campaign. Forms are also the way a field marketer provides input to Campaign flowcharts.

Forms and attributes

Forms are collections of attributes. Attributes are used to collect data about Lists, On-demand Campaigns, or Corporate Campaigns.

Forms define how the attributes are displayed for input by field marketers or corporate marketers, and how the supplied values are stored in a database.

Forms and Campaign flowcharts

When a flowchart is published in Campaign, an associated form is automatically created in Distributed Marketing.

How forms and Campaign flowcharts relate

When a flowchart is published in Campaign, an associated form is automatically created in Distributed Marketing. You use this form to capture and send information from Distributed Marketing to Campaign.

By using the form in this way, you give field marketers control over certain aspects of On-demand Campaigns and Lists.

The administrator does this by exposing parameters in Campaign, publishing the flowchart, and then working with the automatically created form in Distributed Marketing.

Campaign tasks

In Campaign, you must create flowcharts, expose parameters, and publish the flowcharts. The typical workflow is as follows:

1. Create an input flowchart. The function of this flowchart is to create a list as an input to Distributed Marketing.

2. For the input flowchart, expose the parameters that the field marketer should be able to control, for example, `gender` and `income range`.

3. Create an output flowchart. The function of this flowchart is to hold the final list of prospects for the On-demand Campaign.

4. For the output flowchart, expose the parameters that the field marketer should be able to control.

   For example, you may want to field marketer to be able to customize the greeting and the branch name.

5. Publish both the input and output flowcharts.

Distributed Marketing tasks

In Distributed Marketing, you must create a template for an On-demand Campaign or List. The typical workflow is as follows:

1. Run the SQL commands produced as part of the flowchart publishing process.

2. Edit the forms that were created when the flowcharts were published in Campaign.

3. On the Form Definitions screen, click **Publish** next to the form to make the form available for use in templates.

4. Create a template for an On-demand Campaign or List.

5. Add two tabs to the template, one for the input form and one for the output form.

6. Create a new On-demand Campaign or List, using the new template.

7. Generate the list.

8. Run the On-demand Campaign or List.

Adding a form generated from Campaign

When you publish a flowchart in Campaign, an associated form is automatically created in Distributed Marketing. However, the underlying schema for the form does not yet exist in the Distributed Marketing database.

When you open such a form, you are presented with a screen where you can select the database type and the action to take. You select one of the following:

- **Preview SQL**

    Select this option to preview the SQL script that will be used to create the database table for the form.

- **Run SQL Script**

    Select this option to run the SQL script to create the database table for the form.

You cannot work with the form unless the underlying schema exists. That is, before you can edit or publish the form, someone must run the generated SQL commands to create the table(s) to store the contents of the form.

About invalid forms

If a flowchart in Campaign that is associated with a form in Distributed Marketing is modified, then the form becomes invalid. Templates that use the form also become invalid.

Furthermore, all flowchart run tasks that use the form are cancelled.

In order to make the form and templates that use it valid, and to be able to run flowchart run tasks that use the form, you must run the SQL generated by the republished flowchart.

☼ Invalid forms are marked with a a red exclamation point. If a form is deleted (for example, when flowchart is removed in Campaign), then the template is marked with a red cross.

Related Topics

   • Adding a form generated from Campaign

Form Definitions page

Use the links and commands on the Forms Definition page to work with forms. You access this page by selecting **Settings > Distributed Marketing Settings**, then clicking **Template Configuration**, then **Forms**.

The following table describes the links contained in the Form Definitions page:

Link	Description
Name	The name of the form. Click the name to open the form.
	The Pencil icon after a form Name indicates the form has been updated but the changes are not yet published.
	The red exclamation mark indicates that a form is temporarily invalid because the associated flowchart was republished from Campaign.

Link	Description
	The yellow triangle icon indicates a form has been republished and there are changes that must be validated; you must run a SQL script to validate the form.
Disable/Enable	Link to toggle the form between Enabled and Disabled states. • **Disable**: indicates the form is currently Enabled. Click to disable the form. Disabling the form prevents it from being selected in a template. ☼ Disabling a form does not affect templates currently using the form. • **Enable**: indicates the form is currently Disabled. Click to enable. Enabling a form allows it to be selected in a template.
Used By	The list of templates that currently use the form. Click a template name to open that template.
Publish	Click to publish the form.
Revert	Click to discard all the changes made to the form and revert it to the previous published version.
Delete	Click to delete the form.

Related Topics

• Form status

To edit a form

You cannot edit a form in the Published state. You must first disable a published form in order to edit it.

The system continues to use the published version of the form while you are editing it.

1. From the **Settings** menu, select **Distributed Marketing settings**.

   The Administrative Settings screen opens.

2. Click **Template Configuration**.

   The Template Configuration screen opens.

3. Click **Forms**.

   The Form Definitions screen opens.

4. Make changes to the form as necessary.

   If you are making multiple changes, you should periodically click **Save Changes** to save the form and continue working.

5. When you are finished editing the form, click **Save and Exit**.

   The Form Editor closes and you return to the Form Definitions screen.

You must now either republish or revert the form.

To revert a form

You can revert a form to its last published state when you do not want to use recent changes.

1. From the **Settings** menu, select **Distributed Marketing settings**.

   The Administrative Settings screen opens.

2. Click **Template Configuration**.

   The Template Configuration screen opens.

3. Click **Forms**.

   The Form Definitions screen opens.

   Forms that have changed are indicated by a pencil icon ( ).

4. In the row for the modified form, click **Revert**.

The form reverts to its last published state.

To delete a form

You cannot delete a form that is referenced by a template.

1. From the **Settings** menu, select **Distributed Marketing settings**.

   The Administrative Settings screen opens.

2. Click **Template Configuration**.

   The Template Configuration screen opens.

3. Click **Forms**.

   The Form Definitions screen opens.

4. In the row for the form, click **Delete**.

   You are prompted to confirm the deletion.

5. Click **OK** to delete the form.

The form is removed from the system.

About Run History series

Distributed Marketing produces a series of run histories, each series conceptually tied to a version of the form used to generate the results. You view the run history series in a drop-down menu that shows all the series available, with the most recent one selected by default.

The series view contains the following additions to the standard run history:

• Show Series drop-down menu to select the series to show

• Legend that identifies the form version in use, containing the date and time of publishing

About merging forms

When a flowchart is republished in Campaign, a new form is generated that must be merged with the old one. For example, the flowchart may expose a new parameter; you must merge the form to have that parameter appear.

When merging forms, note the following:

• For trivial flowchart changes (for example, when a lookup value for an existing user variable is added), you do not need to take any action, other than republishing the flowchart in Campaign. Distributed Marketing recognizes these changes automatically.

  ☀ However, in this example, you do have the option of not merging the change, if Distributed Marketing uses different lookup values.

• If user variables are added to or deleted from the flowchart, the system alerts marketers to the fact they need to re-validate their Lists and On-demand Campaigns.

• Some small changes made to a flowchart are ignored by Distributed Marketing. For example, changes to localized text such as labels, prompts, and option prompts are ignored, because Distributed Marketing users typically modify this data. Therefore the system does not overwrite these changes.

• If you expose new user variables in a flowchart, and there are already objects in Distributed Marketing that use this flowchart, the system does not update the existing objects with a default value for any new attributes.

To republish a form

You must republish a form when its associated flowchart in Campaign changes.

1. From the **Settings** menu, select **Distributed Marketing settings**.

   The Administrative Settings screen opens.

2. Click **Template Configuration**.

   The Template Configuration screen opens.

3. Click **Forms**.

   The Form Definitions screen opens.

   Forms for which the associated flowchart have changed are indicated by a pencil icon ( ).

4. In the row for the modified form, click **Publish**.

5. Edit the form as necessary.

   If you are making multiple changes, you should periodically click **Save Changes** to save the form and continue working.

Field marketers should re-validate List and On-demand Campaign instances that use the updated form.

To change values displayed in forms

You can modify the display values contained in lookup tables that are used to present choices in drop-down lists and selection tables contained in forms. This allows you to display choices to corporate and field marketers in your organization in their native language. You do this in the Form Editor by modifying individual elements of the form.

1. Edit the form for which you want to modify how values are displayed.

2. Select an element.

3. Click **Update Lookup Table**.

   The Update Lookup Table window opens.

4. Modify or translate the values in the table.

   For example, translate the values for Acquisition, Cross-selling, and Loyalty into a language other than English.

   Your changes replace the text displayed in the drop-down list or display table that is populated by the lookup table.

   ☼ This step fails if the lookup table is a view rather than a table.

5. Save and republish the form when you are finished.

Form status

The follow table lists the possible form status values:

Status Value	Description
Published	The form has been published to make it available for use in templates. You cannot edit a form in this state; you must first disable it. A Published form is also Enabled.
Disabled	A previously Published form was disabled so that it could be edited.
Enabled	A previously Disabled form was enabled so that it could be used by templates.

Form Editor page

The Forms Editor is a visual tool to help you lay out how you want pages to appear to corporate and field marketers.

The form layout is displayed in the main area of the page. In this area, you can:

• Change the format and labels of the parameters.

• Rearrange the layout by selecting and moving elements around the page.

• Add help text, default values, and mark parameters as required

Form Editor tabs

The Form Editor contains three tabs:

• Add an Element tab

• Element Properties tab

• Form Properties tab

Form Editor Commands

The Form Editor contains the following commands:

Command	Description
Save Changes	Saves the changes made to this form and continue editing.
Save and Exit	Saves the changes made to this form and returns the user to the Form Definitions page.
Preview	Opens a pop-up window that shows how the form looks to corporate and field marketers.

Command	Description
Cancel	Discards the non-saved changes and returns to the Form Definitions page.

Add an Element tab

The Add an Element tab of the Form Editor allows you to select elements and drag them to the desired location on the form. In this tab, you work with two kinds of elements:

- General Elements, which include the Attribute Group Header
- Custom Elements

Attribute Group Header

You can add group headers to group the fields on the form. When you add a new group header, you specify its properties, then drag it onto the form. The following table describes the properties for a group header:

Property	Description
Group Internal Name	Internal name of the group.
Group Display Name	The label that is displayed to users on the form.
Description	Descriptive text for the group; this is useful for determining the purpose. This text is not displayed to users.
Show Group Heading	Determines if the Group Display Name is shown on the form.
Group Layout	Determines whether the group is displayed in one or two columns. The value of this property sets the form layout until the next group header on the form appears.

Custom Attributes

You can add custom attributes to the form.

You must first create custom attributes; the custom attributes you create are only available on the current form.

The following custom attribute types are supported:

Type	Description
Text - Single-Line	Text field allowing users to enter a single line of text.
Text - Multi-Line	Text field allowing users to enter multiple lines of text.

Type	Description
Single-Select	Enumerated field, allowing a user to select one value from a list. The choices are driven by a hard-coded list of options you specify when creating the attribute.
Single-Select Database	Same as the Single-Select attribute, except that the list of choices is loaded from a database table containing valid items.
Multiple-Select Database	Same as the Single-Select Database attribute, except that you can choose more than one item from the list.
Yes/No	Boolean field, allowing a user to select one of two values. Can appear in any of the following ways: • Checkbox • Drop-down list • Radio button group
Date Select	Date selector, where the user can enter a date or select a small calendar from which to choose a date.
Integer	Numeric field, allowing users to enter whole numbers.
Float	Numeric field. You can specify the number of decimal places.
Money	Numeric field, allowing users to enter currency values. The system uses the localized currency symbol. You can specify the precision (number of decimal places) for the field.
User-Select	Creates a user selector, which is populated (from Marketing Platform) with all system users. You can use this attribute where the value should come from a list of users.
List of Lists	Special type of multi-select attribute that displays all of the lists of a field marketer in a multi-select format.
Hidden	Used to pass the `ListID` and `Username` properties from a Campaign flowchart that is brought into Distributed Marketing as a form. You can also use this type to create a field to which you assign a default value that you do not need users to see, for example, a field used only for reporting.

☼ Note the following:

- Each attribute type can be displayed with different controls as indicated by the icon in the list.

- To create a new attribute, click **Create a New Custom Attribute** at the bottom of the custom attribute list.

To create an attribute

Before you can create any custom attributes for the form, the database schema for the lookup tables must be created. You must do this outside of Distributed Marketing, with your database management software.

You can create custom attributes from the Add an Element tab of the Form Editor.

☼ Custom attributes you create are only available in the form you are editing.

1. Open the Form Editor for the form to which you want to add a custom attribute.

2. With the Add an Element tab open, click **Create a New Custom Attribute**.

    The Create a New Custom Attribute dialog box opens.

3. Enter information in the Basic Options section as needed.

    Fields marked with two red asterisks (**) are required.

    Additional Basic Options fields may be added, and the Display Options may change, based on the Attribute Type you select.

4. Set the Display Options as needed.

5. Click **Save and Exit** to save the attribute and return to the form editor.

    You can also click **Save and Create Another** to save this attribute, and then create another attribute in the same dialog box.

The custom attribute is now available for use in this form.

Related Topics

   • Add an Element tab

To create a dependent attribute

Dependent attributes are attributes whose values are constrained by another attribute value. For example, if you want to have a field that displays all the cities for a selected state, you could make the City attribute dependent upon the State attribute.

You can make only the following attribute types dependent on other attributes:

•   Single-Select - Database

•   Multiple-Select - Database

1. Create the parent attribute.

    To continue with the example above, you would create the State attribute.

2. Place the parent attribute onto the form.

    The Create a New Custom Attribute dialog box opens.

3. Create the child attribute.

    For example, you would create the City attribute.

4. In the child attribute, check the field **This field is dependent on the following column**.

5. Select the database table column on which this attribute is dependent.

   For example, you would select the State column.

6. Click **Save and Exit** to save the attribute and return to the form editor.

   You can also click **Save and Create Another** to save this attribute, and then create another attribute in the same dialog box.

The dependent custom attribute is now available for use in this form.

Related Topics
   • Add an Element tab

To delete a custom attribute

☼ You cannot delete custom attributes from forms that were created automatically from a published Campaign flowchart.

1. In the Form Editor, select the custom attribute to delete from the Custom Attributes list.

   The custom attribute to delete must be in this list, and not in the form itself.

2. Click **Delete the selected attribute**.

   You are prompted to confirm the deletion.

3. Click **OK**.

   The custom attribute is deleted.

4. Click **Save Changes** or **Save and Exit** to save the form with the deletion.

   To cancel the deletion, click **Cancel**.

Element Properties tab

The Element Properties tab displays the properties of the currently selected element in the Form Editor. This tab is displayed when you select a single element in the form.

The values displayed in this tab are read-only. To edit the values, click **Edit Custom Attribute** or **Edit Attribute Group**.

Form Properties tab

The Form Properties tab displays the properties related to the form. Use this tab to view or edit the form properties. The tab contains the following information:

Property	Description
Form name	The name of the form.
	If the form was created automatically when a Campaign flowchart was published, the Flowchart name, ID, type are displayed in read-only mode.
Form Description	Description for the form.
Form Layout	Radio button group indicating whether the form has a one- or two-column layout.

Properties for forms associated with Campaign flowcharts

If the form was created through the publishing of a Campaign flowchart, it has several additional properties:

Property	Description
Flowchart Type	The flowchart type is either List or Campaign. On-demand Campaigns and Lists typically have two tabs, one for input and one for output. The input form should be designated as List, and the output form should be designated as Campaign.
Flowchart Name	The read-only name of the corresponding flowchart in Campaign.
Flowchart Version	The read-only version of the corresponding flowchart in Campaign.

To remove a custom attribute from a form

☼ You cannot remove custom attributes from forms that were created automatically from a published Campaign flowchart.

1. In the Form Editor, select the element to delete.

2. Click the Delete icon ( ).

    The element is deleted from the form.

3. Click **Save Changes** or **Save and Exit** to save the form with the deletion.

    To cancel the deletion, click **Cancel**.

A Workflows

About workflows

You can manage tasks associated with an Advanced List, On-Demand Campaign, or Corporate Campaign. The Workflow tab provides a spreadsheet on which you can list all tasks. You can assign dates to the task, and team members to perform them.

When you create a new Advanced List, On-demand Campaign, or Corporate Campaign, you use the **Workflow** tab to customize the workflow provided by the template. When you participate in a Advanced List, On-demand Campaign, or Corporate Campaign, you use the **Workflow** tab to keep track of your work. If you have the appropriate permissions, you can save a workflow as a workflow template.

Any member of the Advanced List, On-demand Campaign, or Corporate Campaign can edit any column of the **Workflow** tab as long as he or she has the appropriate access permission.

The workflow tab has an edit mode and three view modes.

- To edit the workflow displayed on the tab, click the Edit icon ( ).

- You can view the workflow as a spreadsheet, a timeline, or a process flowchart.

Related Topics

- About the workflow spreadsheet view

- About the workflow timeline view

- About the workflow process flowchart view

Workflow concepts

Tasks

Tasks are steps in the workflow where a user or the system must take an action. The task is not complete until the action is complete.

Tasks have several types of data associated with them, described below.

Stages

You can group workflow tasks under headings called stages. Stages can help you with task organization. For example, you can create a stage that has all tasks performed by your field marketers. Stages are the headings in bold that group the tasks together.

Dates

Workflows contain the following types of dates.

- **Actual** dates specify when tasks start and finish.

- **Target dates** are dates used to plan the schedule. Typically, they are set at the beginning of the project.

- **Anchored dates** are fixed dates that cannot change, even if the dates of the tasks upon which they are dependent change.

- **Non-work time** are dates when people do not work so the system skips those dates when calculating durations for tasks. Distributed Marketing currently supports system-wide non-work time that applies to all tasks. It is up to the List, On-demand Campaign or Corporate Campaign manager to determine whether overriding any of these dates is necessary. System administrators enter and maintain these dates.

- **Weekend dates** are dates you use to specify work that occurs on a weekend on a per-task basis. You can schedule work on a weekend date using the Schedule Through option for each task.

Duration

Duration is the actual number of days assigned to a task. If you assign actual start and end dates, the duration is automatically calculated as the difference between the actual start date, and the actual end date for a task. You can assign duration using any non-negative number. For example, you can use 0.25 to assign a quarter of a day for the task duration.

Effort

The work effort in days (as opposed to duration) that it takes a user to complete a task. For example, the task may have taken three calendar days to complete, but the task owner only spent half a day on the task for each of the three days, so the effort is one and a half days.

Locked tasks

When you edit a task, the task is locked so no other user can edit it at the same time.

If anyone attempts to edit a locked task, they receive a warning message, indicating that it is currently in use.

People and roles

You can assign tasks to individual team members or you can assign tasks to all team members in a given role. When you assign a task to one or more team members, they are considered to be the task owner. You assign roles to team members from the People tab of the List, On-demand Campaign, or Corporate Campaign.

Workflows use the following concepts to identify the people who perform work.

• **Task owners** are the people responsible for executing or managing tasks.

• **Roles** are used as a bridge between tasks and people. When a role is assigned to a task in a List, On-demand Campaign or Corporate Campaign, all users associated with that role are owners of the task. Templates can contain roles for certain tasks. Then when you create a List, On-demand Campaign or Corporate Campaign, some (or all) of the tasks have a default role already associated with them.

Related Topics

- About System tasks
- About User tasks

About System tasks

System tasks are workflow tasks that start automatically, based on a combination of start date and completion of tasks on which they are dependent.

☼ When you pause a workflow, system tasks scheduled during the time the workflow is paused do not execute until the workflow resumes.

You can create these types of system tasks:

• Subscription

• Flowchart Run

• Notify Field Marketers

• List Review

Related Topics

- Flowchart Run system task
- Notify Field Marketers system task
- List Review system task
- Subscription system task

Subscription system task

A Subscription system task allows you to have field marketers subscribe to, and participate in, a Corporate Campaign.

The Subscription system task is only used in Corporate Campaigns.

A Subscription system task starts and finished automatically, according to the target start and end date. You can also mark it complete manually.

Flowchart Run system task

A Flowchart Run system task allows you to specify a flowchart that should run at a particular place in the workflow. When you create a Flowchart Run system task, you specify one of the following:

- For corporate marketers working with Corporate Campaigns, the name of the flowchart in the linked campaign (in Campaign) in the workflow.

- For field marketers working with On-demand Campaigns and Lists, the name of the tab that is associated with the flowchart in the On Demand Campaign or List that you want to use to gather data.

When Distributed Marketing executes a Flowchart Run system task, flowchart run is started in Campaign.

Flowchart Run system tasks start and finish automatically when there is a matching flowchart in Campaign, when the target start date is reached and when all tasks it depends on are finished; you do not need to manually start or stop a Flowchart run system tasks. The **% Complete** field fills in automatically as the task proceeds.

Flowchart run tasks with no assigned flowchart

The icon for the Flowchart Run system task appears red when no known flowchart is assigned to the task. After you have assigned a flowchart, the icon's color changes to black.

Flowchart Run tasks and Corporate Campaigns

For Corporate Campaigns, for the Flowchart Run system task to run correctly, you must save and publish the flowchart of the linked campaign in Campaign.

Notify Field Marketers system task

A Notify Field Marketers system task allows you to include, within the workflow, automatic notification to Field Marketers. This type of system task is used only with Corporate Campaigns.

☀ A Notify Field Marketers system task must be dependent on a Run Flowchart system task.

When a Notify Field Marketers system task starts, Distributed Marketing sends notification to Field Marketers, informing them that contact lists are ready for their review. Distributed Marketing also adds all selected Field Marketers to the People tab of the Corporate Campaign.

The Notify Field Marketers system task starts and finishes automatically; you do not need to manually start or stop a Notify Field Marketers system task. The **% Complete** field fills in automatically as the task proceeds.

List Review system task

A List Review system task allows you to identify time within the workflow during which Field Marketers will be reviewing contact lists that result from a flowchart run.

☀ A List Review system task must be dependent on a Run Flowchart system task.

List Review system tasks start and finish automatically. You can also manually finish a List Review system task when you are sure all Field Marketers have completed the review. Once you manually finish the List Review task, the next dependent task (if any) in the workflow starts when its target start date has been reached.

When the List Review is completed, manually or automatically, the List is locked to field marketers; field marketers can no longer change their portions of the List.

List Review system tasks and recurring workflows

In recurring On-demand Campaigns or Corporate Campaigns, you can enable permanent updates so that any additions or removals that take place during List Review are applied automatically in all occurrences.

List Review system tasks and multi-offer campaigns

In multi-offer On-demand Campaigns or Corporate Campaigns, you can divide a list generated by a single Run Flowchart system task into several segments. The results of the Run Flowchart system task are presented as several Lists.

To create a flowchart run task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon (   ).

3. Select **Flowchart Run**.

   A new task row is added to the flowchart.

4. In the **Flowchart Name** column, perform one of the following tasks:

   • For Corporate Campaigns, enter the name of the flowchart from your linked campaign.

   • For On Demand Campaigns and Lists, select the name of the tab that runs the Campaign flowchart.

5. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

6. Click **Save and Finish**.

   If the workflow is part of a Corporate Campaign, you must save and publish the associated flowchart in Campaign.

Related Topics

   • Flowchart Run system task

To create a Notify Field Marketers system task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon (   ).

3. Select **Notify Field Marketers**.

   A new task row is added to the flowchart.

4. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

5. Make the new Notify Field Marketers system task dependent on a Run Flowchart system task.

6. Click **Save and Finish**.

Related Topics

   • Notify Field Marketers system task

   • Managing task dependencies

To create a List Review system task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon ( ).

3. Select **List Review**.

   A new task row is added to the flowchart.

4. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

5. Make the new List Review system task dependent on a Run Flowchart system task.

6. Click **Save and Finish**.

7. if you are working on a multi-offer campaign:

   a. Click the name of the List Review system task.

   The Task properties screen opens.

   b. In the **Segment Code** field, enter the name of the segment as it appears in the flowchart in your linked campaign.

   c. Click **Save and Return**.

   You can now enable permanent updates to a list.

Related Topics

- List Review system task
- To enable permanent updates to a list
- Managing task dependencies

To enable permanent updates to a list

1. In the workflow spreadsheet, in Edit view, double-click the List Review system task you want to change.

   The Post Task dialog box opens.

2. Check the **Allow permanent updates** checkbox.

Related Topics

- List Review system task

To create a Subscription task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon ( ).

3. Select **Subscription**.

   A new task row is added to the flowchart.

4. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

5. Click **Save and Finish**.

You must now configure the Subscription task.

At least one flowchart run task must depend on the subscription task. You must add the flowchart run task with this dependency.

Related Topics

- To configure the Subscription task
- Subscription system task

To configure the Subscription task

Before completing these instructions, you must create the Subscription task.

When you configure the Subscription task, in addition to setting the target task dates, you set the subscription Selection Level, the List of Territories, and the Subscription Level. These settings determine which field marketers receive invitations to subscribe to the Corporate Campaign.

1. View the workflow spreadsheet, not in Edit mode.

2. Double-click the Subscription task.

   The Post Task dialog box opens.

3. Enter the **Target Start** and **Target End** dates as needed.

4. Select a **Selection Level**.

5. Select one or more territories in the **List of Territories** field.

6. Select a **Subscription Level**.

7. Click **Save and Finish**.

Example of a Corporate Campaign workflow with system tasks

A typical workflow for a Corporate Campaign might include two flowcharts: one that initially selects a list of contacts, and another that fulfills the campaign after Field Marketers have reviewed and approved the initial list.

Task 1: Subscription

Task 1 is a Subscription system task. You configure a subscription task to invite relevant field marketers to participate in the Corporate Campaign.

Task 2: Flowchart Run

Task 2 is a Flowchart Run system task. The Flowchart Name column identifies the name of the flowchart in the linked campaign (in Campaign) that should be run to complete this task. When task 2 runs, the flowchart Corporate Campaign Selection runs in the linked campaign in Campaign to create a list that Field Marketers should review. Task 2 starts and finishes automatically.

In the image above, the flowchart icon appears in red. This indicates that the associated flowchart in Campaign has not been saved and published.

Task 3: Notify Field Marketers

Task 3 is a Notify Field Marketers system task. This task notifies Field Marketers that the flowchart run has completed and a list is ready for their review. This task starts automatically when Task 2 completes. Task 3 also finishes automatically.

Task 4: List Review

Task 4 is a List Review system task. This task identifies time within the workflow during which Field Marketers should be reviewing the list generated in Task 2. Task 4 starts automatically when Task 3 finishes and finishes automatically when its target end date is reached; however, you can still manually finish the task when all Field Marketers complete their reviews.

Task 5: Flowchart Run

Task 5 is a Flowchart Run system task. The Flowchart Name column identifies the name of the flowchart in the linked campaign (in Campaign) that should be run to complete this task. When task 5 runs, the flowchart Corporate Campaign Fulfillment runs in the linked campaign in Campaign This fulfillment flowchart creates the final list of contacts using the results of the Field Marketer review that occurred in Task 4. Task 5 starts and finishes automatically.

About User tasks

User tasks are workflow tasks that you define and that must be started manually. For example, you can add a user task to the workflow to accommodate the time necessary to develop creative material for the campaign, followed by a user task to approve the creatives.

Users must manually update the status and progress for user tasks.

To edit the the default workflow

Before you can edit a workflow, the Advanced List, On-demand Campaign, or Corporate Campaign must not be in the **In Progress** state. If it is, you must pause it.

When you create a new Advanced List, Corporate Campaign, or On-demand Campaign, the system guides you through a wizard based on the template you selected. When you finish with the wizard forms, you might need to customize the default workflow provided by the project's template. The ability to customize default workflows is controlled by your user permissions.

When you open the Workflow tab in edit mode, if any of the toolbar buttons are disabled or the values in the columns are read-only, it means that you do not have the appropriate security permissions to edit the workflow.

1. Open the Advanced List, Corporate Campaign, or On-demand Campaign that has a workflow to set up and open the Workflow tab.

   This tab displays the workflow as designed in the template.

2. Click the Edit icon ( ).

3. Edit the names listed in the first column to change the default task and stage names to specific tasks and stages.

   Stages are the headings in bold that group the tasks together.

4. Add any stages or tasks, as necessary.

   • Click the Add a Stage Row icon ( ) to add a stage.

   • To add a user task, click the Add a Task Row icon (and select **User Task**.

5. Enter target dates.

   • You can enter start dates, end dates, and duration for a task. Enter any two, the third value is calculated automatically. For example, if you enter a target start and a target end date, the system calculates the duration.

   • You are not prevented from picking any dates that are not in agreement with the per-task options for non-work-time. For example, even if a task is not scheduled to include weekends, you can still pick a Sunday as an end-date for the task.

6. To specify that a task is a milestone of some sort, for example, a drop date, select the **Milestone Type** column and select a milestone that appears in the drop-down list.

   Your administrator can set the milestones that appear in the list.

7. Select members or roles to assign the task to in the **Members** column.

8. Enter any notes about the task in the **Notes** section.

9. Perform one of the following actions.

- Click **Save** to save your changes and remain in edit mode. If you are making extensive edits, it is a best practice to click **Save** occasionally to prevent any loss of work.

- Click **Save and Finish** to save your changes and return to view mode.

- Click **Cancel** to undo any changes and return to view mode.

Related Topics
- To add a stage or task
- About schedules

To add roles to tasks

Normally, when you create a Advanced List, On-demand Campaign, or Corporate Campaign, the workflow automatically contains member and reviewer roles for all tasks if the template selected contains this information.

However, you may occasionally need to assign roles to workflow tasks that differ from the template settings.

1. Navigate to the Workflow tab of your project.

2. Click Edit ( ).

3. Select the **Member Role** cell for the task you wish to assign.

4. Click the turndown icon (▼) to expand the list of available roles, and select the one to assign to this task. Repeat this step until you have assigned all the tasks.

5. Save your work.

To fill data into a range of cells

You can copy a value in one or more cells to a group of continuous cells above or below the selected cells. This can greatly reduce the data entry time for adding duplicate information. For example, assume you have a workflow that contains ten consecutive tasks all having the same target start. target emd. target duration, and target effort.

You can fill in this data for the first task, then copy the values to all the other tasks, by selecting these four columns for all ten tasks and using **Fill Down**.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the task values to duplicate, and click the **Workflow** tab.

2. Click the Edit icon ( ).

3. Select the first cell.

4. Mouse over the final cell, then Shift-click over this cell.

   A range of cells you selected is highlighted.

☀ You must select a continuous range of cells, rather than selecting multiple, disconnected cells.

5. Click the Tools icon (   ), and select **Fill Down** or **Fill Up**.

    •   **Fill Down** copies the values in the top-most cell (or cells) to all the other selected cells, including the bottom-most.

    •   **Fill Up** copies the values in the bottom-most cell (or cells) to all the other selected cells, including the top-most.

All the selected cells now contain the same value.

Remember to save the workflow to keep your changes.

To print the Workflow tab

You can print all information found on your Advanced List, On-demand Campaign, or Corporate Campaign **Workflow** tab, or select certain columns of information to print.

1. From the Workflow tab, click the Print icon (   ).

    A window appears with a list of columns from which you can choose to print. By default, all columns are selected.

2. Clear any columns you do not want to print.

    By default, the **Shrink to Fit Landscape Page Width** box is checked.

3. Optionally, clear the **Shrink to Fit Landscape Page Width** checkbox to print the columns at a size of 100%.

    If you keep this option checked, all selected columns print on a single page. If you use this feature, change your printing preference (for this print job) to landscape.

4. Click **Print Selected Columns**.

5. Click **Print**.

6. Select your printer and printer options, then click **Print** to print the selected workflow columns.

    Choose landscape mode for best results.

7. In the preview window, click **Close** to close the print preview.

To add an attachment to a task

To add attachments for a task, a project owner must enable adding attachments for the task. The following users can add or remove task attachments.

•   Task owners only can add attachments to their tasks.

- Task owners and users with the **Delete Attachment** security permission for projects can delete task attachments.

Note the following.

- There is no versioning for task attachments: uploading a new version overwrites the existing version of the attachment.

- It is possible to have multiple task attachments with the same name for the same task. This can occur if multiple owners of the task each upload a file with the same name. You can differentiate the files by the the user who created the attachment.

- You can add and remove attachments no matter the state of the task. That is, even if a task is marked complete or skipped, you can still add and remove attachments.

- The Attachments tab for projects is divided into two sections: one for files attached to the project's tasks, and one for files attached directly to the project.

- If a task owner adds task attachments, and later the project owner sets the **Enable Task Attachment** flag to false, nobody would be able to add or remove attachments from the Post Task Update dialog. However, task attachments for the project could still be removed from the project attachment tab.

1. Navigate to the task to which you would like to add an attachment.

   Click the task from a project workflow or from the Tasks list page.

   The Post Task Update dialog box opens.

2. Click the **Attachments** tab.

   The tab displays any attachments that already exist for the task.

3. In the **File to Attach** field, select From **My Computer** , **From the Asset Library**, or **URL**.

4. Do one of the following:

   - Click **Browse** to attach on your computer. When the dialog box appears, navigate to the file you want to attach, and click **Open**.

   - Enter the URL in the field provided.

5. Add any comments about the attachment.

6. Click **Add More** to display an additional set of fields for each additional attachment you want to add.

7. After you have added all your attachments, click **Save and Return** to close the dialog box.

Any new attachments are added to the **Attachments** tab for the task.

About milestones

A milestone is a point in time within workflow at which all tasks until that time must be complete in order for work to continue.

If tasks before the milestone are not complete, the milestone is not met, and the next task cannot begin.

Why use milestones

By using milestones within a workflow, you can better enforce process for your lists and campaigns, so that tasks take place in the intended order. In addition, the specific milestones you select in a workflow aid in reporting.

Setting milestones in a workflow

You can set milestones for tasks within a workflow for an Advanced List, On-demand Campaign, and Corporate Campaign.

When you set a milestone, the next task in the workflow cannot begin until the milestone is reached.

Example

For example, the workflow for an On-demand Campaign may consist of the following tasks:

1. Run the flowchart to generate the list of targets.

2. A user task to produce creatives for the campaign.

3. A user task to approve creatives for the campaign.

   At this task, a milestone called `Creatives Approved` is set.

4. Run the flowchart to fulfill the campaign.

By using a milestone at task 3, you can ensure that all creatives for the On-demand Campaign are approved by the necessary people before campaign fulfillment begins.

How available milestones are defined

The specific milestones available for selection in a workflow are defined in a database table by your administrator. See the Distributed Marketing installation and administration documentation for more information.

Related Topics

• To define a milestone for a task

To define a milestone for a task

Before you can define a milestone for a task:

• Your administrator must have defined milestones in the Distributed Marketing database.

- The **Milestone Type** column must be present in the workflow layout. You can ensure it is present by basing the Advanced List, On-demand Campaign, or Corporate Campaign on a template that uses milestones, or by editing the workflow layout.

You can set a milestone for a task in order to ensure that task is complete before the workflow proceeds.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign, and open the **Workflow tab.**

2. If necessary, change the layout of the spreadsheet view to show the **Milestone Type** column.

3. Click **Edit** to make the workflow spreadsheet editable.

4. In the **Milestone Type** column, in the task row for which you want to set a milestone, select a milestone from the drop-down list.

5. Click **Save** or **Save and Finish** to save the milestone you set.

The milestone is now in effect for the Advanced List, On-demand Campaign, or Corporate Campaign.

Related Topics

- About milestones

About date rippling

When you enter or change the date for a task, Distributed Marketing can calculate other dates based on your entry. It uses an internal algorithm to bi-directionally calculate the dates of dependencies, starting with the cell where you entered the date.

When you recalculate dates on a workflow, note the following.

- In addition to factoring in non-work days and hours, date calculations use two additional system-wide properties: start time of day and, number of hours per day. Your system administrator configures these parameters.

- If a task row is anchored, date rippling does not update its dates (even if the date columns are empty).

- Date rippling does not affect active and finished tasks; only tasks with a status of Pending.

- Date rippling observes the per-task options for non-work time. That is, the date rippling algorithm takes into account whether or not a task is scheduled to progress during non-work time and/or weekends.

- Do not log target times outside of business hours if you intend to do date rippling or other automatic calculations afterwards, because that information will be overwritten.

To automatically calculate workflow dates

When you enter or change the date of a task, Distributed Marketing can calculate other dates based on your entry.

1. Enter or change the date for a task in any of the date fields.

2. Select the date and click anywhere on the screen except for another date field.

   The Ripple icon ( ) appears next to the end date.

3. Click the Ripple icon.

   Alternatively, you can select one of the toolbar icons for recalculating dependency dates.

The other dates in the workflow change, based on the new entry.

Related Topics

- Workflow toolbar
- To ripple dates above a locked task

To ripple dates above a locked task

If a workflow has a locked task, and you change the date of a task that is located above the locked task, you receive a warning when you attempt to ripple dates.

To clarify this task, the steps below assume the following:

- Task 1.8 is locked.

- You need to change the duration of task 1.5 from 5 days to 10 days.

- All tasks are dependent on the previous task.

1. Open the workflow for editing, and change the duration on task 1.5 from 5 days to 10 days.

2. Click the ripple icon next to the end date of task 1.5.

   The system displays a warning message, saying you cannot ripple through the locked row.

3. Click the start date of task 1.8

4. Click the ripple icon ( ).

The system calculates the dates below the locked task.

About schedules

There are two options for scheduling in workflows.

- Baseline
- Up-to-date

Baseline scheduling

You use baseline scheduling when you want to compare an actual schedule to a fixed target schedule. With baseline scheduling, you never change the target schedule, allowing it to serve as a baseline. Users who are assigned tasks receive reminders on the actual dates.

While working with a baseline schedule, the owner of the Advanced List, On-demand Campaign, or Corporate Campaign sets the initial Target Start and End dates for each task. These dates stay fixed throughout the entire workflow. As the List, On-demand Campaign, or Corporate Campaign progresses, the owner can update the actual dates with real data based on status information received from team members.

Up-to-date scheduling

You use up-to-date scheduling when you want to establish the schedule as the official schedule that is updated regularly. This mode enables project managers to capture the most up-to-date, official schedule; however, it does not provide easily for viewing a baseline version of the schedule.

To use a baseline schedule

Before creating your Lists, On-demand Campaigns, or Corporate Campaigns, have the system administrator set up permissions and reminders as follows.

- Set permissions so that only List, On-demand Campaign, or Corporate Campaign owners can update **Target** dates.
- Set reminders (Alerts) based on the **Actual** dates.

While working with a baseline schedule, team members perform the following high-level steps.

1. The owner sets the initial **Target Start** and **End** dates for each task.

   These dates stay fixed throughout the entire List, On-demand Campaign, or Corporate Campaign.

2. As the List, On-demand Campaign, or Corporate Campaign progresses, team members update the **Actual** dates with real data.

To keep an up-to-date schedule

Before creating your Lists, On-demand Campaigns, or Corporate Campaigns, have your system administrator set up permissions and reminders as follows.

- Set permissions so that only List, On-demand Campaign, or Corporate Campaign owners can update Target dates.

- Set reminders (Alerts) based on the Target dates.

- Set reminders to be sent only to the owner or owners.

- Optionally, set reminders on the Actual dates to be sent to team members.

While working with an up-to-date schedule, team members perform the following high-level steps.

1. The owner sets the initial Target Start and End dates for each task.

2. As the List or On-demand Campaign progresses, team members update the Actual dates with real data.

3. Once a task is delayed (the owner receives reminders based on Target dates), the owner assesses the situation and adjusts the Target dates and durations as necessary.

About designing for multiple drops, lots, waves, and offers

With Distributed Marketing, you can design Corporate Campaigns, On-Demand Campaigns, and Lists that fulfill a number of business needs.

Related Topics

- About multi-drop design
- About multi-lot design
- About multi-wave design
- About multi-offer design

About multi-drop design

Multi-drop Corporate Campaigns, On-Demand Campaigns or Lists are recurring campaigns or Lists that run at specified intervals (each month, for example) over a defined period of time.

Multi-drop campaigns and Lists use a workflow or a workflow stage that is configured to repeat at specified intervals. Each drop, or stage, in the workflow is made up of the tasks necessary to fulfill one complete drop, or stage, of the campaign.

When to use a multi-drop design

Organizations use multi-drop campaigns or Lists to manage campaigns that span time and require multiple contact points, usually at regular intervals. Examples of multi-drop campaigns are:

- Newsletter campaign—You might create a multi-drop Corporate or On-Demand Campaign to manage distribution of newsletters at regular intervals on an ongoing basis.

- Birthday campaign—You might create a multi-drop Corporate or On-Demand Campaign to manage a campaign where some kind of offer and greeting is sent to contacts during the months of their birthdays.

Setting up multi-drop Corporate Campaigns, On-Demand Campaigns, and Lists

Multi-drop Corporate Campaigns, On-Demand Campaigns, and Lists use recurring templates. In the multi-drop template, you must:

- Define the stage of your workflow that contains the tasks you want to recur (only one stage can be recurring)

- Define properties for recurrence using the Recurrence tab

Multi-drop design is applied when you create a Corporate Campaign, On-Demand Campaign, or List using the recurring templates you've established.

About multi-lot design

Multi-lot Corporate Campaign and On-Demand Campaigns are campaigns that distribute the effort of customer contact over time when dealing with a very large list of targeted customers.

When to use a multi-lot design

Organizations use multi-lot features to manage customer lists that are too large to handle at once. A multi-lot design allows Field Marketers to accept a subset of a list for contact in one "lot." Field Marketers can then accept more contacts for contact at subsequent lots, thereby distributing the effort over time.

Setting up multi-lot Corporate Campaigns and On-Demand Campaigns

To achieve a multi-lot design, your Corporate Campaigns or On-Demand Campaigns must use flowcharts in Campaign that are designed specifically for each lot. You can use a single flowchart for all lots, or a separate flowchart for each lot. In either case:

- The list generation task for the initial lot selects from your Campaign database to create the first list for Field Marketer review.

- The list generation task for the second lot targets those contacts that were left in the Waiting state after the first list review, as well as any new contacts included from the latest list generation.

About multi-wave design

A multi-wave design for Corporate Campaigns and On-demand Campaigns allows you to distribute offers through several waves of contact. Multi-wave Corporate Campaigns and On-demand Campaigns are typically nonrecurring campaigns, with workflows made up of different stages, or waves. Multi-wave campaigns take advantage of Campaign response tracking. You can design a "second wave" of offers to be sent to contacts who did not respond to the initial offer.

When to use a multi-wave design

Use a multi-wave design when you want to manage campaigns that present a series of offers to customers. For example, an organization may want to create a multi-wave Corporate Campaign to:

1. Send an offer to a list of contacts.

2. Send a second offer to contacts who did not respond to the initial offer.

    For example, Field Marketers may use the same flowchart each month to identify prospects who have birthdays in the current month. In this case, the first wave of the campaign must complete, so that you can identify the non responders. Once this wave is complete, the second wave of the campaign can be used to distribute the second offers to the non responders.

Understanding multi-wave Corporate Campaigns and On-Demand Campaigns

To achieve a multi-wave design, your Corporate Campaigns and On-Demand Campaigns must use flowcharts in Campaign that are designed to accommodate each wave of contact. Note that you can use a single flowchart for all waves, or create a separate flowchart for each individual wave. In either case:

•   The list generation task for the initial wave selects from your Campaign database and creates the first list for Field Marketer review.

•   The list generation task for all subsequent waves should select from only those contacts generated by the previous wave as input. For example, if you want to send an offer to contacts who did not respond to the first wave, the flowchart used for the second wave should filter out the responders and select the non responders from the first wave.

About multi-offer design

A multi-offer design for Corporate Campaigns, On-Demand Campaigns, and Lists allows you to create a campaign or List that sends different offers to different customers.

Multi-offer Corporate Campaigns, On-Demand Campaigns, or Lists can be nonrecurring or recurring. These campaigns take advantage of the segmenting capabilities in Campaign to target different contact segments with different offers.

When to use a multi-offer Corporate Campaign, On-demand Campaign, or List

Organizations use multi-offer design to manage campaigns and Lists that target different segments of the customer population. Examples of multi-offer design include:

*   Offers for responders and non responders—You might create a multi-offer campaign to provide one offer to those who respond to a campaign, and another separate offer to those who do not respond.

*   Offers for different audiences—You might create a multi-offer campaign to manage different offers for different audiences. For instance, a financial institution might send one offer to college students and another offer to individuals who are head-of-household.

Flowchart design in Campaign for multi-offer campaigns and Lists

To achieve multi-offer design, your Corporate Campaigns, On-demand Campaigns, and Lists must use Campaign flowcharts that divide contacts into Segments. Each segment represents a different customer list; each customer list is paired with a different offer in Campaign.

You can use Distributed Marketing to ensure that each customer list is reviewed by the right Field Marketers.

☼ The flowchart must be configured to write the Segment Code for a segment into the List Manager table

The List Review task matches the segment code in the task with the code written into the List Manager table; it can then filter the list by segment code.

List Review task/segment association for multi-offer campaigns and Lists

For multi-offer campaign and Lists, you create a workflow that consists of user and system tasks, just as you would for any other Corporate Campaign, On-demand Campaign, or List.

With multi-offer campaigns and Lists, however, you must ensure that all customer lists created by the flowchart are reviewed. You do so by associating each List Review task in your workflow with each segment created by the flowchart in the campaign in Campaign

In the workflow spreadsheet, if you click the link to any List Review system task, the following screen appears:

Post Task...

for ✉ Mark Test (C000000006) - 1.3. Review List

Help

Status ✎0

Owner(s) :
None

Actual Dates:
From - to - for 0.00 day

Status **
[Pending ▼]

% Complete: **
[0] %

Actual Effort:
[   ] day(s)

Target Start: **
[08/05/2009 ▦▼ ◀▶] at [09:00 AM ▼]

Target End: **
[08/07/2009 ▦▼ ◀▶] at [09:00 AM ▼]

Actual Start:
[▦▼ ◀▶] at [09:00 AM]

Actual End:
[▦▼ ◀▶] at [09:00 AM ▼]

Comments:
[   ]

Segment Code:
[   ]

Allow permanent updates:
☐

[Save and Finish] [Cancel]

The Segment Code field that appears in this screen allows you to identify the appropriate segment for the review.

☼ The Segment Code you enter here must match the segment name as it appears in Campaign.

To create a multi-offer Corporate Campaign

1. Create a Corporate Campaign.

2. Modify the workflow.

   Enter the flowchart names that will be used for each Flowchart Run task. For each List Review system task:

   a. Click the task name.

The task properties window appears.

b. Complete the task properties window as desired.

In the Segment Code field, enter the appropriate segment name as it appears in the flowchart in your linked campaign (in Campaign).

3. Create the linked campaign in Campaign.

4. Create the flowcharts corresponding to one or more Flowchart Run tasks in the workflow.

Ensure the following:

- The flowcharts create different segments.

- The Segment Codes are written to the List Manager table.

5. Save and publish each flowchart.

6. Start the Corporate Campaign in Distributed Marketing.

To create a multi-offer On-demand Campaign or List

In most cases, field marketers create multi-offer On-demand Campaigns and Lists by selecting a template in which a corporate marketer or administrator has already set up the necessary segments, flowcharts, and workflows.

The instructions below describe the steps to take before the field marketer actually creates the On-demand Campaign or List, to be performed by others working with Campaign and Distributed Marketing templates.

1. Create flowcharts and forms for your On-Demand campaign or List.

Ensure the following:

- The flowcharts create different segments.

- The Segment Codes are written to the List Manager table.

2. Create an On-Demand campaign or List template and add forms as a custom tab.

3. Modify the workflow.

For each List Review system task:

a. Click the task name.

The task properties window appears.

b. Complete the task properties window as desired.

In the **Segment Code** field, enter the appropriate segment name as it appears in the flowchart used to create your forms/tabs.

4. Create an On-Demand campaign or List using the template.

5. Start the On-Demand campaign or List.

Updating and finishing tasks

When you create a task, or open a new workflow with existing tasks, the status of the task or tasks is **Pending**. As project members work on tasks, they update the status to indicate the current progress.

To place a task into any status, ensure the workflow is in edit mode, and click the **Status** column of the task, then choose the appropriate status from the drop-down list

Status	Description
Pending	Indicates a task has not yet started. When you create a task, it defaults to the pending state. The pending state is symbolized by a blank status field.
Active	Indicates a task is in progress. Symbolized by the ↻ icon. You can also type A to place a task in the active state
Skipped	Indicates a task has been skipped. Symbolized by the ✕ icon. Skipped tasks are tasks for which members no longer do work. Any dependencies of this task are also disregarded. You can also type S to place a task in the skipped state.
Finished	Indicates a task has been completed. Symbolized by the ☑ icon. You can also type F to place a task in the finished state.

Note the following behavior.

- If you enter 100 in the **% Complete** column for a task, the status is updated to **Finished**.

- If you enter 0 in the **% Complete** column for a task (if it was previously finished), the status is updated to **Pending**.

- If you enter any number from 1 to 99 in the **% Complete** column for a task (if it was previously finished), the status is updated to **Active**.

- If you mark the status for a task as **Skipped**, all of the dates for the task are cleared. Until you hit **Save** (or **Save and Finish**), you can retrieve the dates by canceling out of the editing session. However, once you save the spreadsheet with the dates cleared, you cannot retrieve them.

To complete multiple tasks

You have been assigned tasks for one or more Advanced Lists, On-demand Campaigns, or Corporate Campaigns.

1. Open the Tasks list page to view all of your assigned tasks.

2. Select the checkbox for each task you wish to complete.

3. Click **Complete Selected**.

4. In the Complete Selected Tasks dialog box, select one of the radio buttons:

- **Leave all dates as they are**. The tasks are marked as complete, but no end dates are modified.

- **Set all actual end dates to now**. Each selected task is marked complete, and its actual end date field is set to the current date and time.

5. Click **Continue** to complete the selected task or tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected are removed from the Tasks list page, and their status is changed to Complete. Additionally, their end dates are set, if you selected that option.

To skip multiple tasks

You can perform this task when you have been assigned tasks for one or more Advanced Lists, Corporate Campaigns, or On-demand Campaigns.

1. Open the Tasks list page to view all of your assigned tasks.

2. Select the checkbox for each task to skip.

3. Click **Skip Selected**.

4. In the confirmation dialog box, click **OK** to skip the selected tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected and skipped are removed from the Tasks list page, and their status is changed to Skipped.

About copying and pasting tasks

When copying and pasting tasks, note the following.

- For copying, you must select a continuous range of tasks, rather than selecting multiple, disconnected tasks (by using Ctrl+click).

- If you do not insert enough blank tasks to correspond to the ones you are copying, existing tasks are overwritten.

- To paste rows at the insertion point, you can click **Paste** from the **Tools** menu or press Ctrl+V. To paste rows after the selected row, you must click **Paste Rows After** from the **Tools** menu.

To copy tasks in Internet Explorer

You can copy a continuous group of tasks to another place in the same workflow or into the workflow for another Advanced List, On-demand Campaign, or Corporate Campaign.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the tasks to copy and click the **Workflow** tab.

2. Click **Edit**.

3. Select the first source task. If this is the only task you are copying, skip to step 5.

4. Mouse over the final source task, then Shift-click over this task. A range of tasks you selected is highlighted.

5. From the workflow toolbar, select **Copy** from the **Tools** menu item to copy the selected task or tasks.

    If you are pasting the tasks into the same workflow, skip to step 7.

6. If you are copying the tasks to another project workflow, navigate to the destination workflow tab, and open it for editing (click its **Edit** link).

7. Optionally, insert enough blank rows below the destination to act as placeholders for the tasks you are copying.

    For example, if you are copying 6 tasks, make sure there are 6 blank rows available. If you do not create the necessary rows, existing tasks below the insertion point are overwritten.

8. Click the destination task.

9. From the workflow toolbar, select **Paste** from the **Tools** menu item to paste the task.

    The source tasks are placed in the workflow, starting from the selected destination task.

Related Topics

- To add a stage or task

Post task update dialog box

This dialog appears when you click a workflow task in view mode. Use this dialog as a quick alternative to editing the entire workflow, when you only need to update a single task. From this dialog, you can update certain items, add task attachments, as well as adding comments to the revision history of the Advanced List, On-demand Campaign, or Corporate Campaign.

The Post Task Update dialog box contains two tabs, **Status** and **Attachments**.

Status

The **Status** tab contains the following fields.

Field	Description
Owner(s)	The task owner or owners. At the task level, Advanced List, On-demand Campaign, or Corporate Campaign members are referred to as task owners.
	That is, in the workflow spreadsheet, you use the **Members** column to add people to a task; this column refers to Advanced List, On-demand Campaign, or Corporate Campaign members. When you open the task in the **Post Task Update** screen, these members are listed as Owners (which refers to task owners).

Field	Description
Target Dates	The target start and end dates, as well as the duration for the task. You can edit either or both of the date and time selectors to update the information.
Status	The status of the task. Edit this field by selecting a value from the field's pull down menu.
% Complete	The current progress for the task. Enter a number between 0 and 100 to change the value.
Actual Effort	The effort for the task, measured in days. Enter a value to update the field. This field can contain partial days, for example, `3D-2H-0M`
Actual date and time fields	The Actual begin and end dates and times for the task. You can edit either or both of the date and time selectors to update the information.
	☼ Begin and end dates are mandatory; you receive a warning if you attempt to save without entering values for both fields. Additionally, the system checks to ensure the end date is not earlier than the begin date.
Comments	Displays comments for the task. You can enter text to update the field.
	These notes go in to the revision history of the project and any notifications that may be sent about the task.
Enable Task Attachments	A flag to determine whether or not the task can contain attachments. This field is visible to Advanced List, On-demand Campaign, or Corporate Campaign owners only. Check the box to allow the task to contain attachments.

☼ Make sure you close the dialog box by clicking either **Save and Return** or **Cancel**; if you do not use one of the buttons to close the dialog box, the task may remain locked, and no one else can edit it.

☼ To change the state of a finished task back to active, you must set both the **Status** to **Pending**, and the **% Complete** field to an integer less than 100. If you do not change both fields, after you close the dialog box, the task is still marked as completed.

Attachments

The **Attachments** tab contains the following fields.

Item	Description
Current attach-ments section	The top portion of the page describes the current attachments of the task. It contains three columns of information for each attachment: • **File**: Contains a link to the attachment file and describes the file type and size. • **Description**: Contains revision history and description for the attachment. ☼ The name of the user who added the attachment is listed. This is important, as the creator differentiates attachments with the same name for the same task. • **Actions**: Contains links for deleting the attachment or for sending the attachment via email.
File to Attach	Contains a drop-down menu that allows you to specify the source of the file to attach.
Browse	Use this button to browse your computer or the asset libraries for the file to attach.
Comments	Use this text box to add any comments for the attachment.
Attach Selected File	Use this button to attach the selected file or URL.

Related Topics

• Workflow tab fields

Managing task dependencies

IBM Unica Distributed Marketing has several options for managing dependencies on tasks as new rows are added to the spreadsheet and existing rows are removed.

• **Normal**: no dependencies are automatically created. If you need dependencies for the new tasks and stages, create them manually.

• **Sequential**: insert the new task in an existing chain of tasks.

• **Parallel**: insert a new task branch parallel to an existing chain of tasks.

Inserting tasks in sequence

Insertion **in sequence** makes the new task dependent on the task before it, and then makes all items that were dependent on that task dependent on the new task.

You insert a task in sequence when it can only start after the previous task has completed. For example, in the figure below, if task X cannot be worked on until task B has been completed, you insert task X in sequence.
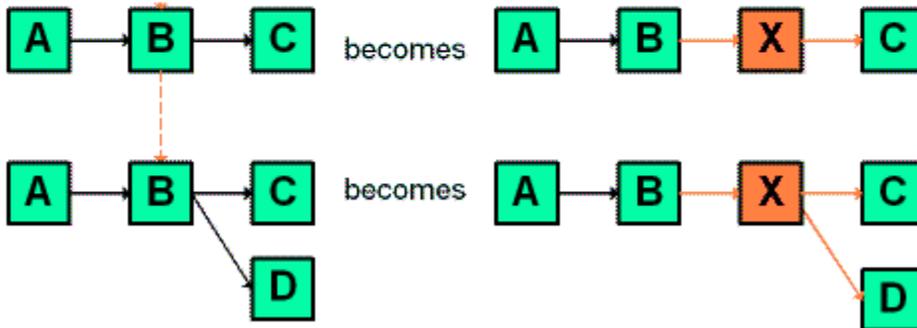
Inserting tasks in parallel

Insertion **in parallel** makes the task dependent on the items (tasks or stages) that the task before it was dependent on, and makes the items dependent on the previous task dependent on the new task as well.

You insert a task in parallel when it can be worked on at the same time as another task. For example, in the figure below, if task X can be worked on simultaneously with task B, you insert task X in parallel.
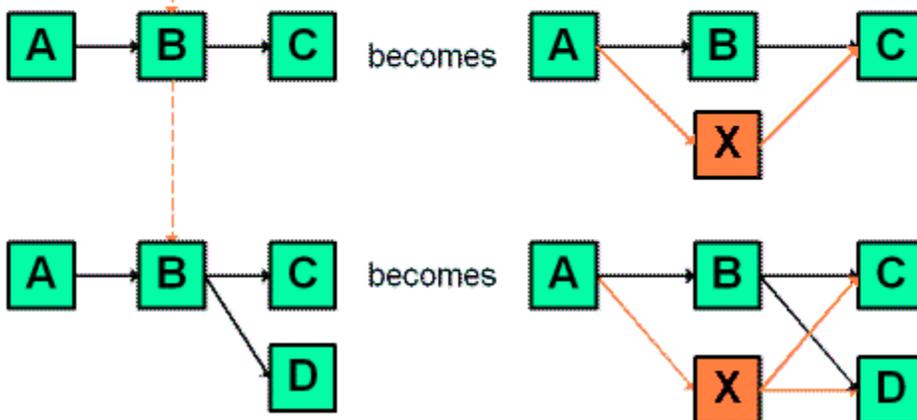
Deleting tasks

Deleting a task removes the selected task from the chain, but re-links the two remaining segments of the chain together so that it is one continuous chain again.
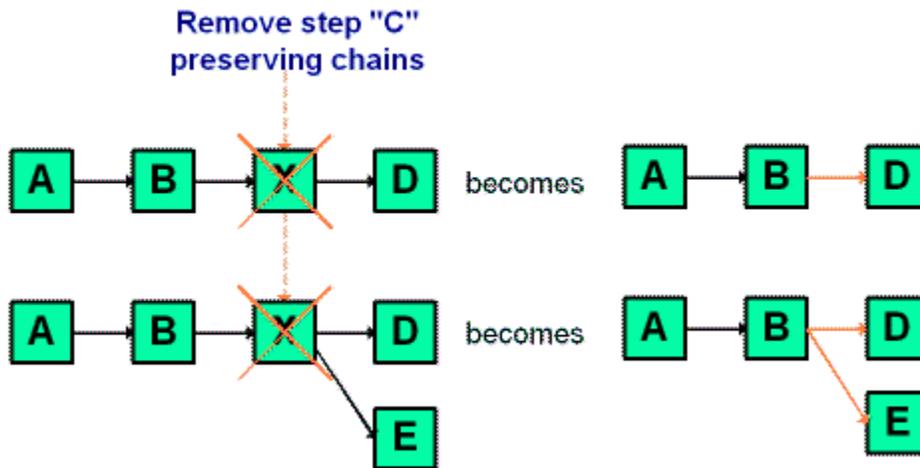
When a task is deleted its dependents are made dependent on its dependencies before the deletion takes place. This preserves all sequential chains of dependencies.

Default and "last used" modes

To make adding a task as simple and consistent as possible, IBM Unica Distributed Marketing provides the following behavior.

• The default mode is "in series;" when you begin an editing session, this is the insertion mode.

• There is a "last used mode," remembered for each editing session. Once you select a mode from the menu, this mode is used each time you add a task during the remainder of your session.

For example, to add several tasks in parallel, you only need to select the **in parallel** mode once; then every time you insert another task, the system inserts it in parallel, unless you explicitly select another mode.

About adding a stage or task

To add a task or stage to a workflow, your security role must grant you the permission named **Add/Edit/Delete Steps, Dependencies and Targets** for the template you select. If the **Add** button is missing from the toolbar, contact your administrator about obtaining the appropriate access rights.

Note the following about stage and task rows.

• When adding a stage or task, if you place the number of the task in front of the task name, the task is inserted in the place that the number indicates.

 For example, if you enter `2.3 Have team meeting` anywhere in the task list, the task is placed under the task labeled 2.2 and the numbers of subsequent tasks shifts, so that the step previously labeled 2.3 is now 2.4.

• You can add a stage or task anywhere in the list and then use the up and down icons on toolbar to move the stage or task to the appropriate place in the list.

- There are several options for managing dependencies on tasks as new rows are added and existing rows are removed.

Related Topics

• Managing task dependencies

About editing a stage or task

If you change the number for a task or stage, the task is inserted before the row matching the new number.

For example, assume the stage order as shown here.

1. Planning

2. Collateral Design

3. Lead Generation

4. Show Setup-to-Breakdown

5. Marketing Review

If you edit task 5, Marketing Review, changing its number to 3, the new order is as follows.

1. Planning

2. Collateral Design

3. Marketing Review

4. Lead Generation

5. Show Setup-to-Breakdown

Now suppose you edit task 2, Collateral Design, changing its number to 4. The new order is the following.

1. Planning

2. Marketing Review

3. Collateral Design

4. Lead Generation

5. Show Setup-to-Breakdown

To move a task or stage to the end, give it any number higher than the final task or stage. For example, to move stage 2, Marketing Review to the end, change its number to 6 or higher.

To add a stage or task

Before adding a stage or task, open a workflow in edit mode.

1. In the workflow, select the stage or task above the place to insert the new stage or task.

2. Add a stage, or standard task.

   - Click the Add Stage Row icon ( ) to add a stage.

   - Click the Add Task Row icon ( ) to add a standard task.

3. Optionally, to make a task dependent on another task, enter the number of the task it is dependent on after the task in parentheses ( ).

   For example, suppose task is named `Generate List`. To make this task dependent upon task 1.3, name the task `2.5 Generate List (1.3)`.

4. When you have finished editing the workflow, save your changes.

The stage or task is added to the workflow, after the insertion point.

If the date of one task changes, it changes the dates of all the dependent tasks.

If a task has more than one dependency, separate the task numbers with commas. For example, use `2.2 Setup Milestone Schedule (1.1, 2.1)`.

To add a stage or task below a locked task

Before adding a stage or task, open a workflow in edit mode.

If you select a locked task, the insert task/stage links do not work. To add a task directly below a locked task, you must perform the following steps.

1. Navigate to the workflow page to change and click **Edit**.

2. Select any task row that is not locked.

3. Add a stage, standard task, or approval task.

   - To add a stage, click the Add Stage Row icon .

   - To add a standard task, click the Add Task Row icon .

4. Change the number of the task or stage so that it directly follows the locked task it should follow.

   For example, suppose the locked task is `2.5 Review copy – informal (2.3)`. You would set the number of the new task to `2.6`. Once you finish naming the task, the system moves it so it is after task 2.5.

About the workflow spreadsheet view

When you display the workflow as a spreadsheet (the default), the workflow displays the information about the stages and tasks in your workflow as a list in a spreadsheet. You use this view to update task status, add reviewers, and changes dates, among other tasks.

Related Topics
- Workflow tab fields
- Workflow toolbar

About the workflow process flowchart view

The process flowchart view shows displays the tasks in a network diagram style, as follows.

- Each task is displayed as a box with a task number and ID.

- Tasks that have dependencies are connected to any tasks they depend on.

- Sequential tasks are displayed on the same line.

- Parallel task are displayed on different lines.

- Independent/orphan tasks are displayed on their own line, with no connections.

About the workflow timeline view

The timeline view of the workflow tab presents a view of the List, On-demand Campaign, or Corporate Campaign over a period of weeks or months. To view the project schedule in a timeline view, click the `View as Timeline` icon.

You can customize the timeline view by using the `Layout` link from the workflow tab. Use this dialog box for the following purposes.

- Select the captions, if any, to appear next to each bar in timeline.

- Choose a weekly or monthly view of the timeline.

- Select the types of dates to view.

☼ If you click the **Edit** link from the timeline view, the spreadsheet opens for editing.

Workflow tab layout page

Use this page to set the appearance for both the spreadsheet and timeline views of a workflow tab.

☼ To hide the Spreadsheet Layout or Timeline Layout section, click the icon next to the title. To view a hidden section, click the icon.

Spreadsheet layout section

Field	Description
Columns	Check a column to display, or uncheck to hide.
Preset Column groups	Click a link to select one of a preset group of columns to display. • **All**: default setting; all boxes checked (all columns displayed) • **Targets**: hides Status, % complete, and Actual date columns. • **Actuals**: hides Target Dates/Effort and Member/Reviewer roles columns. • **All dates**: displays all columns related to target and actual dates. • **Responsibility**: displays columns related to who is assigned to complete the tasks.
First Column Width	Select one of the radio buttons. • **Remember Last Setting**: When viewing the workflow spreadsheet, you may adjust the first column width to see more or less of the task names. • **Exactly**: Select this button and enter a number to set the column to an exact width in pixels.

Timeline layout section

Field	Description
Time Scale	The increment of time used for measurement. Select either **Weeks** or **Months**. The default setting is Weeks.
Bars Represent	The bars in the timeline view indicate durations. You can choose to display either Forecast/Actual dates, Target dates, or both. The default is to display both.
Bar Captions	By default, the bars do not have captions. Select one of the choices from the drop down menu to display certain information as bar captions. For example, you can have the task name or milestone type display as a caption.
First Column Width	See the First Column Width description for in the Spreadsheet Layout section above.

Buttons

Button	Description
Make these the default	Check this box to keep your settings as the default for the workflow. This ensures that whenever you navigate away from and back to this tab, your display setting will not change (until the next time you make changes and check this box).
	☼ These are the defaults for **all** users, for this workflow, until someone changes the defaults.
Apply and Close	Click to apply your changes and close the dialog.
Apply	Click to apply your changes. Your changes display on the workflow, and the dialog remains open for further editing.
Restore Defaults	Restores all settings to their default values, undoing any customizations you have made.
Cancel	Click to close the dialog without changing any settings.

Related Topics

• To set first column width on workflow spreadsheet

Workflow tab fields

When the workflow appears in spreadsheet view (the default view), it includes the following fields and columns.

Field	Description
Tasks and stages	Lists the task stages and tasks that comprise the Advanced List, On-demand Campaign, or Corporate Campaign. When in edit mode, click a stage or task to revise or change. When in view mode: • Clicking a workflow task opens the **Post Task Update** screen in a new window.
Status	The status of the task.
% Complete	The percentage value that represents how complete a task is. When in edit mode, click the measuring bar for a task and enter a number. The measuring bar expands to a comparable level.

Field	Description
Actual Start	After you change a task from Pending to Active, this field represents the Actual Start date. Actual Start dates are in regular font. In edit mode, use the pop-up calendar to select a date and time.
End	After you change a task from Active to Finished, this field represents the Actual End date. Actual End dates are in regular font. In edit mode, use the pop-up calendar to select a date and time.
Dur.	The duration of the task, in days, hours, and minutes. If you enter both start and end dates, the system automatically calculates a value for this field (the End date minus the Actual Start date).
Actual Effort	The actual effort it took to complete the task, as opposed to calendar duration. Effort is measured in days, hours, and minutes.
Anchored Dates	Indicates whether the task is anchored. If a lock appears in this field, the task's dates are anchored. To specify a fixed date for a task, click the column, then select **Anchored** from the pull down menu. The task date cannot move even if the dates of the tasks it is dependent on change. If a dependency is not met, the dates in conflict appear with a different icon and in a different font. For example, suppose task 2.2 is dependent on task 2.1. If the target end date of task 2.1 is after the target start date of task 2.2, both the target end date of 2.1 and the target start date of 2.2 appear in red, if you anchored the date for task 2.2 by selecting the lock icon in the **Anchored Dates** column.
Schedule Through	Indicators for which dates to use when determining task dates. The following options are available. • **Business**: indicates this task includes only standard, non-holiday, non-weekend dates. This is the default for all tasks. • **Weekends**: indicates this task includes weekends. The system includes weekends when it calculates dates for this task. • **Off.**: indicates this task includes system-wide non-work time that has been defined. The system takes into account these times when it calculates dates for this task. • **All**: indicates this task includes all dates. No dates are ignored when dates are calculated for this task.
Target Start	The targeted start date of the task. In edit mode, use the pop-up calendar to select a date.
Target End	The targeted end date of the task. In edit mode, use the pop-up calendar to select a date.

Field	Description
Target Dur.	The actual duration of the task, in days, hours, and minutes. The Target End minus the Target Start dates.
Target Effort	The targeted effort estimated to complete the task, as opposed to calendar duration.
Milestone Type	A task milestone that you choose from a drop-down list. Example options might be Meeting, Event, and Job Start. Plan administrators set the milestone types that appear on the list. For more information on setting up milestones, see the *Distributed Marketing Administrator's Guide*.
Member Role(s)	A role or roles associated with the task. These can be loaded automatically from the project template used to create the project, or the project owner can set them up manually. When an approval task has a status of In Progress, On hold, or Completed, this field is read-only.
Members	The people associated with the task. If a workflow task has a role in its **Member Role(s)** column, when you assign people to roles, the workflow automatically adds a person in the corresponding **Members** column. You can also add people to the Members column manually, while editing the workflow. When you edit the workflow for an approval task, teams are not listed in this field because a team cannot be the owner of the approval task. Typically, standard tasks have members.

Related Topics

• Updating and finishing tasks

Workflow toolbar

When the Workflow tab is in edit view, a toolbar appears. You use the buttons on the toolbar to make changes to the workflow. For example, you can insert and delete tasks, add a stage, clear all entries, and so on.

The following table explains each button.

Icon	Description
	Add Task Row. Adds a new people task in the spreadsheet.

Icon	Description
	Click a dependency option • No dependencies • In series • In parallel This option determines how IBM Unica Distributed Marketing behaves when adding new tasks.
	Add Stage Row. Adds a new stage in the spreadsheet. Tasks are grouped in stages.
	The Tools menu contains the following choices. • **Copy:** copies the contents of the selected cells to the clipboard. • **Paste:** pastes the contents of the clipboard, beginning at the selected cell. • **Paste Rows After:** pastes the contents of the clipboard below the selected row. • **Mark as...:** marks the selected task appropriately. For example, selecting **Mark as Finished** changes the status of the selected task to Finished. You can mark the task Skipped, Finished, Active, or Pending. • **Fill Down/Up:** copies a cell's values to a range of cells. • **Clear:** erases all entries in the selected cell or group of cells. • **Clear Column:** erases all entries in the selected column. ☼ The date columns have dependents as follows: if you select Clear Column to erase the Target Start, the Target End column is also erased and vice versa. If you select Clear Column to erase the Forecast/Actual Start, the Forecast/Actual End column is also erased and vice versa. • **Clear All:** erases all entries in the workflow.
	Click to recalculate dependent dates while preserving slack time. Recalculates all date dependencies based on your changes; leaves any existing slack time between dependent tasks.
	Click to recalculate dependent dates while removing slack time. Recalculates all date dependencies based on your changes; removes any slack time between dependent tasks.
	Click to undo your last change.
	Click to reapply a change you undid with the Undo action.
	Move row up. Click to move the selected task or stage upward. If you move a stage, the associated tasks move with it.

Icon	Description
	Move row down. Click to move the selected task or stage downward. If you move a stage, the associated tasks move with it.
	Delete row. Click to delete the selected task or stage. Note the following. • If you delete a stage, all of its associated tasks move up one stage. • If you delete the first stage, the first task associated with it becomes the stage for the rest of the tasks.

Related Topics

• Managing task dependencies

• To copy tasks in Internet Explorer

• To fill data into a range of cells

Workflow links

The **Workflow** tab displays the following links.

Link	Description
Breadcrumbs	Click any active link in the breadcrumbs trail to go to that page. Breadcrumbs (a list of pages you visited prior to arriving at the current page) are located above the List, On-demand Campaign, or Corporate Campaign name.
Edit	Click the icon to add, remove, or make changes to workflow stages and tasks.
View as spreadsheet	Click the icon to view the workflow as a spreadsheet. This view provides access to granular information about a task, presented in table format. For example, you can easily look up a task's status, duration, forecasted end date, and team members using the column headers. This is the default view.
View as timeline	Click the icon to view the workflow as a timeline. This view provides a graphic view of information such as task duration and status. From the Project Timeline drop-down menu, select various options such as Dates/Progress to show this information on the timeline.
Layout	Click the icon to open a dialog for adding and removing columns from the spreadsheet view.

Link	Description
Save as template	Click to save the workflow definition directly into the template library (if you have the permission to do so). A dialog is presented to allow you to name the template. For more details, see the *Distributed Marketing Administrator's Guide*.
Tasks and stages	In the spreadsheet view, tasks are links that behave as follows: • Clicking an approval tasks pops up the summary page for the approval in a new window. • Clicking a workflow task pops up the Post Task Update dialog in a new window.

Related Topics

• To edit the the default workflow

• About the workflow spreadsheet view

• About the workflow timeline view

• Workflow tab layout page

• Post task update dialog box

To change the layout of the workflow

You can change the layout of the spreadsheet and timeline views of the workflow to display the information that you need.

1. In the **Workflow tab**, click **Layout**.

    The Instance Workflow Tab Layout dialog box opens.

2. In the **Spreadsheet Layout** section, select the checkboxes of all columns you want to show in the workflow.

    You can also use the links after **Columns to display:** to select subsets of available columns.

3. Set the first column width for the spreadsheet view.

4. In the **Timeline Layout** section, select values from the **Time Scale**, **Bars Represent**, and **Bar Captions** drop-down lists.

5. Set the first column width for the timeline view.

6. To have these settings apply only to the currently opened workflow, as opposed to all workflows you view, check **Use these settings for current workflow only**.

7. Click **Apply** or **Apply and Close** to save your selections.

The view of the workflow is updated to reflect your selections.

Related Topics

• To set first column width on workflow spreadsheet

To set first column width on workflow spreadsheet

You can change the width of the first column in the workflow spreadsheet view, and keep this setting for your entire session. That is, your changes remain after you navigate to other pages and subsequently return to this tab.

1. Navigate to the **Workflow** tab of the Advanced List, On-demand Campaign, or Corporate Campaign.

2. Use the column width control to resize the first column to your preferred width.

3. Click the **Layout** link in the top right section of the screen.

4. In the **Instance Workflow Tab Layout** dialog, do the following:

    a. In the **First Column Width** section, select the **Remember Last Setting** radio button.

    b. At the bottom of the dialog, check the **Make these the default settings for this project's workflow tab** box.

5. Click **Apply and Close** to save your changes and close the dialog.

The first column width is now set for this Advanced List, On-demand Campaign, or Corporate Campaign, for the remainder of your session; no matter which pages you navigate to, when you navigate back to this workflow tab, the first column width remains as you set it.

B IBM Unica Distributed Marketing Configuration

Distributed Marketing configuration

This section describes Distributed Marketing configuration tasks you perform.

You perform these tasks on the server where Distributed Marketing is installed.

About configuring the list display

To enable corporate marketers to share lists with field marketers, you must configure these lists to link to your customer data. As you configure your Distributed Marketing database settings, you first need to create the list tables. Later, you configure the display format, search criteria, and table relationships.

About setting up data filters for the list display

Data filters are available across the Marketing Platform, enabling you to limit what data IBM Unica Marketing users can see.

For example, you can create a data filter based on region so your regional field marketers can see only the customers in their region. The data filters apply to all data viewed in Distributed Marketing, including when you create lists, when field marketers review lists and search for other contacts, and when working with forms.

Components affected by data level filtering for the list display

Configuring these data filters requires coordination between three components of the Marketing Platform:

- The data filters in the Marketing Platform as a whole

- Lists and forms in Distributed Marketing

- Table mapping and flowcharts in Campaign

Example workflow for configuring data filters

The following example shows the steps involved were you to set up data level filtering for the list display bases on your customers' regions:

1. Create a **region_id** column in the list tables in Distributed Marketing.

2. Create data filters in the Marketing Platform for each region, based on the **region_id** column of the list manager tables in your customer database.

3. Map the **region_id** column in the list tables to the **region_id** column in your customer database using Campaign.

4. Create flowcharts in Campaign that populate the **region_id** column.

5. Configure the list display and the form templates in Distributed Marketing to filter on the **region_id** column.

☼ As shown in the above example, data filtering requires planning and is an iterative process. You must coordinate your configuration across the Marketing Platform, Campaign, and Distributed Marketing. You must ensure you use the same naming conventions across these components.

About creating list tables in your customer database

To enable lists, you must create six tables in your customer database:

- `uacc_lists` - a list of contacts generated as a List.

- `uacc_ondemand_lists` - a list of contacts generated by On-Demand Campaigns.

- `uacc_corporate_lists` - a list of contacts generated by a flowchart in a Corporate Campaign.

- `uacc_permanent` - a list of contacts to be permanently added to or deleted from Lists.

- `uacc_ondemand_permanent` - a list of contacts to be permanently added to or deleted from On-Demand Campaigns.

- `uacc_corporate_permanent` - a list of contacts to be permanently added to or deleted from Corporate Campaigns.

> These tables store the selected contacts ID of the list and must be created in the same database as the customer tables.

To create the list tables

1. Add any additional columns for your audience level(s) in the `listmanager.sql` table creation script.

   The `listmanager.sql` file is in the `tools\admin\db\`*`db_type`* directory under your Distributed Marketing installation, where *`db_type`* is the database you are using, `sqlserver`, `oracle`, or `db2`.

2. Execute the `listmanager.sql` script to create the required tables.

   Note the following.

   • The script creates the tables in the customer database.

   • You can also add columns to the tables based on your particular requirements for data filtering. For example, you can add a column to filter by region.

Step: Configure the View List and Search List pages

To enable field marketers to review the lists, you must format and configure the View List and Search List pages. The following guidelines describe the general changes you must make to the View List and Search List configuration files.

> If no search screen is configured for an audience level, users cannot add records when reviewing a list for this audience level; the **Add Records** link is disabled.

Configuring the database connection

Edit the `listmanager_tables.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

• Define the data source containing your customer tables.

• Define the tables you want to access.

• Define the columns in the tables that you want to display on the View List page.

> There is only one copy of `listmanager_tables.xml`, and it defines the columns that are used in view list and search list screens. Configure the `listmanager_tables.xml` appropriately for both the `listmanager_list.xml` and `listmanager_searchScreens.xml` files.

Configuring the View List page

Edit the `listmanager_list.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

- Define the type of data views with the List element.

- Define the data that appears in each view.

- Define the sort order of each view.

- Define an application to display customer details.

Configuring the List Search page

Edit the `listmanager_searchScreens.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

- Define the available search criteria.

- Define the way Distributed Marketing displays the results.

About disabling the List Manager List tables

If you do not want to use the List Manger, you need to edit the `collaborate_config.xml` file and set the `listManagerEnabled` parameter to `false`.

List display configuration files

Distributed Marketing controls the display of lists through three XML files:

- listmanager_tables.xml

- listmanager_list.xml

- listmanager_searchScreens.xml

These files are located in `conf` directory under your Distributed Marketing installation.

At installation, these XML files are populated with examples that work with the sample data provided.

Note the following:

- To add special characters to the listmanager XML files, use Unicode encoding. For example, é should be encoded as Ã©.

- To use certain characters in the configuration files, you must use XML entities. For example, using < as a value will break the configuration file, as it is part of the XML syntax. You must use the entity for <, which is `<`.

- If you update the listmanager XML files (for example if you add new columns or a new list display), you must also update the corresponding properties files (`list_language.properties` and/or `searchscreen_language.properties`).

listmanager_tables.xml

You can use the `listmanager_tables.xml` file to declare the following:

- The audience level of the data model of your organization on which the list content is based

- The data source

- The tables used in the search and list screens

AudienceLevel

`AudienceLevel` defines the audience levels of your data model. It contains the following attributes:

- `Label` - A short description of the audience level.

- `Name` - The code for identifying the audience level. This must match the `AudienceLevel` attribute of the list element of the `listmanager_list.xml` file.

- `Table` - The name of the table which contains the audience level.

- `Datasource` - The name of the datasource used to access the table from the customer database.

For example:

```
<AudienceLevel Label="Indiv" Name="Individual" Table="v_indiv_contact"
Datasource="JNDI_Name_for_customer_DB">
```

Each `AudienceLevel` element contains a child element, `Column`:

```
<AudienceLevel ...>
  <Column... />
</AudienceLevel>
```

Column

The `Column` parameter specifies the ID column in the audience level table. `Column` contains a single attribute, `Name`, for the name of the ID column(s) in the Audience table. For example:

```
<Column Name="Indiv_ID"/>
```

DataSource

The `Datasource` element defines the data source declared to access the tables. It contains the following attributes:

- `Name` - The JNDI name of the data source in the web application server.

- `Type` - The database type. The valid values are `SQLSERVER`, `DB2`, `ORACLE`, `NETEZZA`, or `TERADATA`.

- DecimalSeparator - The character which denotes the decimal place. The valid values are period (.) or comma (,).

For example:

```
<Datasource Name="ACC_DEMO" Type="SQLSERVER" DecimalSeparator="."/>
```

Table

Table defines the tables on which the search screens and list screens are based. This element contains the following attributes:

- Name - The name of the table.

- DataSource - The data source used to access the table.

- Owner - The owner or schema of the database (used to prefix the table name).

For example:

```
<Table Name="v_indiv_contact" Datasource="ACC_DEMO" Owner="dbo">
```

Each Table element contains a child element, Column, which can optionally include a LinkedTo parameter:

```
<Table ...>
 <Column...>
  <LinkedTo ... />
 </Column>
</Table>
```

Column

The Column parameter describes each column in the table defined by the parent Table element. It contains the following attributes:

- Name - The name of the column.

- Type - The type of data stored in the column. Valid values are A (alphanumerical), N (numerical), D (date stored as VARCHAR yyyymmdd), F (date stored as DATE/DATETIME).

- Length - The length of the column.

- DecimalLength - The length of the decimal part for a numeric column.

For example:

```
<Column Name="Indiv_ID" Type="N" Length="10" />
```

The LinkedTo parameter specifies the relationship between a column and a table that defines references. For example, a table contains userID and householdID columns. These columns need to reference another table that relates userID to the Customer audience and householdID to the Household audience.

This element contains the following attributes:

- `Table` - The table where the reference is defined.

- `Column` - The key column of the table on which the reverence is defined.

For example:

```
<LinkedTo Table="v_indiv_contact" Column="Indiv_ID"/>
```

listmanager_list.xml

You can use the `listmanager_list.xml` file to configure the view list screens.

List

The `List` element describes the list display format. You can define several display formats as long as the code is unique. You can choose the format to apply when opening the list screen. For example, you can create a contact format that displays only the name, address, and phone number of the contact and create a demographic format to display the income, age, and gender of the contact.

This element contains the following attributes:

- `Name` - The name of the list display format.

- `Code` - The code of the list display format. It must be unique.

- `AudienceLevel` - The audience level the list display format is based on. This audience level is defined in the `listmanager_tables.xml` file.

- `Multiple` - If set to `true`, you can select more than one member of the list. If set to `false`, you can only select one member of the list.

- `Datasource` - The name of the datasource used to access the table from the customer database.

For example:

```
<List Name="Contact" Code="CONTACT" AudienceLevel="Individual"
Datasource="JNDI_Name_for_customer_DB">
```

Each `List` element can contain `Select`, `Order`, and `Link` child elements:

```
<List ... >
 <Select ... />
 <Order ... />
 <Link . . . />
</List>
```

Select

The `Select` element describes the table and columns to display in the list content. Distributed Marketingdisplays the columns in the same order as they appear in this file.

This element contains the following attributes:

- `Table` - The name of the table to display. It must also be defined in the `listmanager_tables.xml` file.

- `Column` - The name of the column to display from the related table. It must also be defined in the `listmanager_tables.xml` file.

- `Label` - The label of the column header. It is a tag that will be replaced by localized descriptor contained in each list_*language*.properties resource bundle file.

For example:

```
<Select Table="v_indiv_contact" Column="indiv_id" Label="indiv_id"/>
```

Order

The `Order` element describes the default sorting column(s). It contains the following attributes:

- `Table` - The name of the table that contains the sorting column(s). It must also be defined in the `listmanager_tables.xml` file.

- `Column` - The column on which the sorting is based. It must also be defined in the `listmanager_tables.xml` file.

- `Label` - The order type. The valid values are `ASC` for ascendant sorting or `DESC` for descendant sorting.

For example:

```
<Order Table="v_indiv_contact" Column="last_name" Type="ASC"/>
```

Link

The `Link` element describes the URL for the external application that contains customer details. The `Link` element is optional. It contains the following attributes:

- `URL` - The base URL of the application, without any parameters.

- `Label` - The link label or icon tool tip.

- `Logo` - The name of a file as use as the icon. (optional)

- `LogoHeight` - The height of the icon. (Use only with the `Logo` attribute.)

- `LogoWidth` - The width of the icon. (Use only with the `Logo` attribute.)

- `NavName` - The browser name.

Each `Link` element can contain multiple `Param` child elements.

For example:

```
<Link Url="http://localhost:7073/LeadsContact/callLeads.jsp"
Label="last_name" Logo="contact.gif">
 <Param Name="affiniumUserName" Type="user" Value="userlogin"/>
```

```
 <ParamName="LeadsRmcTbid" Type="column"
Value="v_customer_contact.customer_id"/>
</Link>
```

Param

The `Param` element describes a parameter to add to the base URL. It contains the following attributes:

- `Name` - The http parameter name.

- `Type` - The type of information to send. The valid values are user to send the current logged user information and column to send the value of a specified column.

- `Value` - The specific information to send. If the `Type` attribute value is `user`, the valid values of the `Value` attribute are `userlogin` and `userid`. If the `Type` attribute value is `column`, the valid value of the `Value` attribute is the column whose value should be appended to the base URL, specified as `Table.column`.

- `DateFormat` - The format for sent dates. Used only for a date column (type D or F).

For example:

```
<Param Name="affiniumUserName" Type="user" Value="userlogin"/>
<ParamName="LeadsRmcTbid" Type="column"
Value="v_customer_contact.customer_id"/>
```

listmanager_searchScreens.xml

You can use the `listmanager_searchScreens.xml` file to customize list search screens based on audience level and other criteria.

This file defines:

- The criteria fields

- The displayed result fields

You can define several search screens based on different audiences, different criteria and/or searching results to be used in Distributed Marketing When the field marketers use search, the screen appearance is based on the audience levels configured the `listmanager_tables.xml` file. If the various screens are based on the same audience level, the field marketer can choose from the various pre-defined searches. For example, you can create a basic search that only contains name and address, then an advanced search which contains name, address, income, and account activity.

You can choose not to define a search screen for a given audience level in order to prevent adding people to the List Manager for a given campaign or List. The field marketers would not be able to add a contact based on that audience level because no search screen had been defined.

Following are descriptions of each element and sub-element as well as their related attributes.

Listmanager_searchScreen.xml contains several SearchScreen elements. Each of these sets up a multi-criteria search screen criteria and result set. This element contains the following attributes:

- Name -The name of the screen.

- AudienceLevel - The audience level the search screens will be based on. The AudienceLevel is defined in the listmanager_tables.xml file.

- Label - The label of the column header.

- MultiSelect - If set to true, you can select more than one element in the final list. If set to false, you can only select one element in the final list.

- Datasource - The name of the datasource used to access the table from the customer database.

For example:

```
<SearchScreen Name="default_indiv_search" AudienceLevel="Individual"
    Label="default_indiv_search" MultiSelect="true"
Datasource="JNDI_Name_for_customer_DB">
```

Each SearchScreen tag has the following structure:

```
<SearchScreen ... >
 <Criteria ... >
  <Field ... >
   <Lookup ... />
  <Field ... />
 </Criteria>
 <Result ... >
  <Field ... />
  <Order ... />
 </Result>
</SearchScreen>
```

Criteria

The Criteria element specifies the search criteria. It contains the Field element, which describes the search criteria fields.

Field

The Field element contains the following attributes:

- Table - The table on which the search is based.

- Column - The column on which the search is based.

- Label - The descriptor that appears on the screen for the criteria. It is a tag that will be replaced by localized descriptor contained in each searchScreen_*language*.properties resource bundle file.

- Operator - The type of operation. The valid values are =, like, <, >, <=, >=, <>.

- `Default` - The optional default value. It can be set to `@userlogin` and will be replaced by the user login at execution.

- `Order` - The display order of the criteria on the screen.

- `Long` - (Optional) The length of the criteria value. If this is not specified, the criteria takes the value defined in the attribute length of the table's column in the `listmanager_tables.xml` file.

- `Minimallength` - (Optional) The minimal number of characters of the criteria value.

- `Case` - (Optional) The case of the criteria value. The valid values are Lower or Upper.

- `Displayed` - (Optional) Whether the criteria is displayed or hidden. The valid values are true or false.

For example:

```
<Field Table="v_indiv_contact" Column="username" Label="username"
Operator="=" Displayed="false" Default="@userlogin" Order="5"/>
```

A `Field` element can contain a `Lookup` element. The `Lookup` element specifies how to populate a list box criteria. The `Lookup` element contains the following attributes:

- `Table` - The table containing the data of the list.

- `Id` - The ID column containing the data of the list.

- `Desc` - A description of the list.

- `Where` - (Optional) Enables you to filter the values according to a Where clause.

- `Display` - (Optional) Specifies what is displayed in the list box: the code and/or the description. The values can be: id, desc, id – desc, or desc – id.

For example:

```
<Lookup Table="lkp_region" Id="Region_id" Desc="Region"
Where="" Display="desc"/>
```

Result

The `Result` element specifies the searching results set. It contains `Field` and `Order` elements.

Field

The `Field` element specifies the displayed result fields. `Field` contains the following attributes:

- `Table` - The table containing the searching results.

- `Column` - The column containing the searching results.

- `Label` - The descriptor that appears on the header of the result list.

- • `Format` - The format (such as code and/or description) to display in the list box criteria in the case of a column that has a relationship with a lookup table. The value can be `code`, `label`, `code - label`, or `label - code`.

For example:

```
<Field Table="v_indiv_contact" Column="Indiv_ID" Label="indiv_id"/>
```

Order

The `Order` element specifies the displayed sorting column for the result records. `Order` contains the following attributes:

- • `Table` - The table of the column on which the records are sorted.
- • `Column` - The columns on which the records are sorted.
- • `Type` - The sorting order. The valid values are `ASC` or `DESC`.

For example:

```
<Order Table="v_indiv_contact" Column="Last_Name" Type="ASC"/<
```

About Distributed Marketing configuration parameters

This section provides information on configuration parameters for Distributed Marketing.

You set all configuration parameters in the `collaborate_config.xml` file, which you can find in the `IBM-home\DistributedMarketing\conf` directory.

Required parameters

Following are the parameters you must configure in the `collaborate_confix.xml` file.

Parameter	Description
systemUserLoginName	Login name of a Marketing Platform user to be used for system tasks (for example, the system task monitor or the scheduler). IBM strongly recommends that the system user not be a normal Distributed Marketing user.
notifyCollaborateBaseURL	The URL for Distributed Marketing. Edit this URL by entering the computer name where you installed Distributed Marketing and the port number to the port you want to use.

Parameter	Description
flowchartServiceCampaignServices20URL	The URL to the CampaignServices2.0 web service that should be used to run flowcharts, get flowchart data, and so on. The default is `http://`*`Server-`*`*Name:Port*/Campaign/services/CampaignServices/2.0`. where *Server-Name* and *Port* are defined by the `notifyCollaborateBaseURL` parameter. ☼ Do not change the default value for this parameter unless Campaign is installed on a different machine or port than Distributed Marketing.
flowchartServiceCampaignServices20AuthorizationLoginName	A Campaign user with administrative permissions, including access to all data sources, for example, asm_admin.
uploadDir	The full path to the Distributed Marketing upload directories. Edit this path to include the full path to the Distributed Marketing upload directories. For example, `c:\Unica\DistributedMarketing\projectattachments`. If you are using UNIX, confirm that Distributed Marketing users have permission to read, write, and execute files in this directory.
taskUploadDir	The full path to the Distributed Marketing task upload directories. Edit this path to include the full path to the Distributed Marketing task upload directories. For example, `c:\Unica\DistributedMarketing\taskattachments`. If you are using UNIX, confirm that Distributed Marketing users have permission to read, write, and execute files in this directory.
templatesDir	The directory that contains all your templates. IBM recommends you set this to the full path to *`IBM-Home`*`\DistributedMarketing\templates`.
collaborateAttachmentsDIRECTORY_directory	Specifies the directory for attachments generated by flowcharts in Campaign. This path must match the default Campaign partition directory.
serverType	The type of web application server you are using. The valid values are `WEBLOGIC` or `WEBSPHERE`.

Parameter	Description
defaultCampaignPartition	The default Campaign partition. Distributed Marketing uses this parameter if you do not define the <campaign-partition-id> tag in a project template file. Set value to `partition1`.
defaultCampaignFolderId	The default Campaign folder ID. Distributed Marketing uses this parameter if you do not define the <campaign-folder-id> tag in a project template file. Set value to `2`.
notifyEMailMonitorJavaMailHost	The machine name or IP address of your organization's SMTP server.
notifyDefaultSenderEmail	A valid email address for Distributed Marketing to use to send emails when there is otherwise no valid email address available to send notification emails.

Data source parameters

You specify the JNDI name of the data source for the Distributed Marketing system database as follows:

```
<UAPDataSources jndiname="data-source-JNDI-name" />
```

Miscellaneous initialization parameters

All initialization parameters have the following format:

```
<UAPInitParam parameter-name="value">
```

Parameter	Description
collaborateAttachmentsDIRECTORY_deletefile	Specifies whether the original attachment generated by a flowchart should be deleted after being copied. Default value is `false`.
flowchartServiceCampaignServices20Timeout	The number of milliseconds Distributed Marketing waits for communications with the Campaign services before issuing a timeout error. The default is `600000`.
flowchartServiceSchedulerServices10Timeout	The number of milliseconds Distributed Marketing waits for communications with the Marketing Platform scheduler before issuing a timeout error. The default is `600000`.
flowchartServiceSchedulerServices10MaxRetries	The number of times Distributed Marketing attempts to connect with the Marketing Platform scheduler before issuing an error.

Parameter	Description
flowchartServiceSchedulerServices10RetryPollPeriod	The number of seconds Distributed Marketing waits before attempting to communicate with the Marketing Platform scheduler again.
flowchartServiceSchedulerServices10ThrottleType	The type of throttling for scheduled flowchart runs. The valid values are: • `0`: no throttling (throttle value is ignored) • `1`: throttle per flowchart instance • `2`: throttle all flowcharts (default)
flowchartServiceSchedulerServices10ThrottleValue	The maximum number of scheduled flowcharts or flowchart instances that can be run at one time. The default value is `10`.
flowchartServiceSchedulerMonitorPollPeriod	Optional. Defines the approximate time, in seconds, for the scheduler monitor to sleep between polls. The default value is `10`.
flowchartServiceSchedulerMonitorRemoveSize	Optional. Sets the number of jobs to try to remove from the queue in one shot. The scheduler monitor continues removing events from the event queue in increments specified by this value until none are left. The default value is `10`.
flowchartServiceIsAliveMonitorTimeout	The duration, in seconds, to wait between the start of the flowchart execution and the periodic queries to Campaign of the isAlive monitor. The default value is `900` seconds (15 minutes).
flowchartServiceIsAliveMonitorMaxRetries	The maximum number of queries which are sent to Campaign by the isAlive monitor before throwing a flowchart execution error. The default value is `10`.
flowchartServiceIsAliveMonitorPollPeriod	The time, in seconds, to wait between queries made by the isAlive monitor to Campaign. The default value is `600` seconds (10 minutes).
locales	Supported locales: The valid values are: • English: (en_US) • French: (fr_FR) • German: (de_DE) • Korean: (ko_KO) • Italian: (it_IT) • Portuguese: (pt_PT) • Spanish (es_ES) The default is `en_US`.
defaultlocale	Locale default. The default is `en_US`.

Parameter	Description
usermanagerSyncTime	Time in Milliseconds to sync with the Marketing Platform. The default is `10800000`, equivalent to 3 hours.
enableRevisionHistoryPrompt	Ensures users are prompted to add change comments when saving a project/request or approval. The valid values are true and false. The default is `false`.
listItemsPerPage	Specifies how many items (rows) to be displayed in one list page. This value should be greater than `0`. The default is `10`.
listPageGroupSize	Specifies the size of visible page numbers in the list navigator in the list page. For example. pages 1-5 is a page group. This value should be greater than `0`. The default is `5`.
firstMonthInFiscalYear	The first month in the fiscal year. The default is `0` for January.
daysInPastRecentTask	How many days in the past Distributed Marketing looks for recent tasks. The default is `14`.
daysInFutureUpcomingTasks	How many days in the future Distributed Marketing looks for upcoming tasks. The default is `14`.
validateAllwizardwizardSteps	Determines whether or not Distributed Marketing checks required fields on nonvisited wizard steps. The default is `true`. Use this parameter to change behavior that occurs after you click Finish in the project wizard: • `true`: Distributed Marketing checks all required fields on all non-visited wizard steps (except workflow, tracking, attachments) when creating a project using the wizard. If there are any required fields that are blank, the wizard jumps to that page and displays an error message. • `false`: Distributed Marketing does not check required fields on non-visited wizard steps. ☼ Distributed Marketing automatically checks the current page for blank required fields. This parameter controls whether Distributed Marketing checks all pages for blank required fields once you have clicked Finish.
beginningOfDay	Indicates the beginning hour of the working day (valid values are 0-12, representing midnight to noon). The default is `9` (for 9:00 AM). This setting is used to calculate the date-times in workflows when using fractional durations.

Parameter	Description
numberOfHoursPerDay	Indicates the number of hours per day (valid values are 1-24). The default is `8`, indicating a standard, 8-hour work day. This setting is used to calculate the date-times in workflows when using fractional durations.
timeout_redirection	The url to display if your session has expired. If left blank, redirects to the Marketing Platform logout page.
reportsAnalysisSectionHome	Indicates the home directory for the Analysis Section reports.
reportsAnalysisTabHome	Indicates the home directory for the object (Corporate Campaign, List, or On-demand Campaign) Analysis Tab reports.
reportsAnalysisCorporateSectionHome	Indicates the home directory for the corporate marketer Analysis Section reports.
reportsAnalysisCorporateTabHome	Indicates the home directory for the corporate marketer object (Corporate Campaign, List, or On-Demand Campaign) Analysis tab reports.
reportsAnalysisFieldMarketerSectionHome	Indicates the home directory for the field marketers Analysis Section reports.
reportsAnalysisFieldTabHome	Indicates the home directory for the field marketer object (Corporate Campaign, List, or On-Demand Campaign) Analysis tab reports.
alertCountRefreshPeriodInSeconds	Indicates, in seconds, the system-wide alert count refresh period for the alerts count (this count appears near the top of the navigation bar after a user logs in). The default is `180` seconds.
projectWorkflowRefreshPeriodInSeconds	System-wide workflow refresh period. The default is `180` minutes (3 minutes).
searchModifiedTasksForSummaryFrequencyInSeconds	How often, in seconds, to search for changes in task executions in order to refresh the Summary tab. The default is `10` seconds.

Notification parameters

All notification parameters have the following format:

```
<UAPInitParam parameter-name="value">
```

Parameter	Description
notifySenderAddressOverride	Optional. Email address to use for the REPLY-TO and FROM email addresses for notifications. By default the event number owner's email address is used. If this parameter is not declared or an empty email address is provided, the default addresses are used.
notifyDelegateClassName	Optional. Specifies the fully-qualified Java class name of the delegate implementation to be instantiated by the service.
notifyIsDelegateComplete	Indicates the delegate implementation is complete. The default value is true.
notifyEventMonitorStartTime	Optional. Time to start the event monitor, formatted according to the java.text.DateFormat class for the current locale, SHORT version. For example, in US English, the valid string is HH:MM A/PM. The default is set to start immediately after monitor is created.
notifyEventMonitorPollPeriod	Optional. Defines the approximate time, in seconds, for the event monitor to sleep between polls. The default value is 33.
notifyEventMonitorRemoveSize	Optional. Defines the number of events to try to remove from queue in one shot. The default value is 10.
notifyEmailMonitorStartTime	Optional. Time to start the email monitor, formatted according to the java.text.DateFormat class for the current locale, SHORT version. For example, in US English, the valid string is HH:MM A/PM. The default is set to start immediately after monitor is created.
notifyEmailMonitorPollPeriod	Optional. Defines the approximate time, in seconds, for the email monitor to sleep between polls. The default value is 60.
notifyEMailMonitorJavaMailSession	Optional. Specifies the JNDI name of an existing initialized JavaMail Session to use for email notifications.
notifyEmailMonitorJavaMailProtocol	Optional. Mail server transport protocol to use for email notifications. The default is value is smtp.
notifyEmailMonitorRemoveSize	Optional. Defines the number of emails to try to remove from queue in one shot. The default is value is 10.
notifyEmailMonitorMaximumResends	Optional. Maximum number of times to try to resend an email after send problems are detected. The default is value is 60.

Parameter	Description
notifyProjectAlarmMonitorStartTime	Optional. Time to start the project alarm monitor. If not set will start immediately after monitor is created. The default is value is `10` PM.
notifyProjectAlarmMonitorPollPeriod	Optional. Defines approximate time, in seconds, for the project alarm monitor to sleep between polls. The default is value is `60`.
notifyProjectAlarmMonitorScheduledStartCondition	Optional. The number of days before a project's start date when Distributed Marketing should start sending start notifications to users. If a project is pending and it's start date is within the condition number of days in the future, a PROJECT_SCHEDULED_START notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorScheduledEndCondition	Optional. The number of days before a project's end date when Distributed Marketing should start sending end notifications to users. If a project is active and it's end date is within the condition number of days in the future, a PROJECT_SCHEDULED_END notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorScheduleCutOffCondition	Optional. The number of days to start notifying users that a project is scheduled to be enclosed. If a project is active and it's cutoff date is within the condition number of days in the future, a CORPORATE_CAMPAIGN_TO_REVIEW notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorTaskScheduledStartCondition	Optional. The number of days before a task's start date when Distributed Marketing should start sending end notifications to users. If a task is pending and it's start date is within the condition number of days in the future, a TASK_SCHEDULED_START notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorTaskScheduledEndCondition	Optional. The number of days after a task's start date when Distributed Marketing should begin notifying users that a task did not start. If a task is active and it's end date is within the condition number of days in the future, a TASK_SCHEDULED_END notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.

Parameter	Description
notifyProjectAlarmMonitorTaskLateCond ition	Optional. The number of days after a task's start date when Distributed Marketing should begin notifying users that a task did not start. If a task is pending and it's scheduled start date is within the condition number of days in the past, a TASK_LATE notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorTaskOverdue Condition	Optional. The number of days after a task's end date when Distributed Marketing should begin notifying users that a task did not finish. If a task is active and it's scheduled end date is within the condition number of days in the past, a TASK_OVERDUE notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
notifyProjectAlarmMonitorTaskSchedule dMilestoneCondition	Optional. The number of days before a task milestone's start date when Distributed Marketing should start sending notifications to users. If a milestone task is active and it's scheduled end date is within the condition number of days in the future, a TASK_SCHEDULED_MILESTONE notification will be sent out to the appropriate users. If the value is `-1`, then this condition isn't checked for. The defaule value is `5` days.
systemTaskMonitorStartTime	Optional. The time to start the system task monitor. • If this parameter contains a value (for example, `11:00 pm`), this is the start time for the task monitor to start. • If this parameter is undefined, the monitor starts immediately after it is created.
systemTaskMonitorPollPeriod	Optional. The duration, in seconds, for the system task monitor to sleep between polls. The default value is `3600` seconds (one hour).

Initialization parameters

All initialization parameters have the following format:

```
<UAPInitParam parameter-name="value">
```

Parameters	Description
flowchartServiceNotificationServiceURL	The URL to Distributed Marketing's notification service that receives notifications from Campaign. The default is: ``` http://server- name:port /collaborate/flowchartRunNotifyServlet ``` where *port* and *port* are defined by the **notifyCollaborateBaseURL** configuration parameter. This parameter is optional. ☼ If you use a non-standard context root, you must specify this parameter.
enableFlowchartPublishEvent	Specifies if Distributed Marketing receives events sent by Campaign when a flowchart is published. Default value is `true`.
flowchartRepublishOverwritesUserVarPrompt	Specifies if the User Variable prompt is overwritten when a flowchart is republished. Default value is `false`.
flowchartRepublishOverwritesProcParamPrompt	Specifies whether the Process Parameter prompt is overwritten when a flowchart is republished. Default value is `false`.
emailMaximumSize	Maximum size, in bytes, of an email. The default is `2,000,000` bytes.
collaborateFlowchartStatusPeriod	The period in milliseconds between two flowchart status checks. The default is `2000` milliseconds.
collaborateFlowchartStatusPeriodRunning	The period in milliseconds between two flowchart status checks when the flowchart is running. The default is `1,800,000` milliseconds, or 3 minutes.
collaborateModeForAttachments	Distributed Marketing can get the attachments generated by flowchart execution from the Campaign server through the following modes: • Directory (the default) • HTTP • FTP • TFTP
collaborateAttachmentsDIRECTORY_directory	Indicates the address in the Campaign server where Distributed Marketing takes the attachments if the mode is set to `Directory`, the default.
collaborateAttachmentsDIRECTORY_deletefile	The value `true` indicates the original files will be deleted after copy. The default is `false` if the mode is set to `Directory`.

Parameters	Description
collaborateAttachmentsFTP_server	Indicates the server where Distributed Marketing takes the attachments if the mode is set to FTP.
collaborateAttachmentsFTP_port	Optional. Indicates the port where Distributed Marketing takes the attachments if the mode is set to FTP.
collaborateAttachmentsFTP_username	Optional. Indicates the username to login on FTP server where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is FTP.
collaborateAttachmentsFTP_password	Optional. Indicates the password to login on FTP server where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is FTP.
collaborateAttachmentsFTP_account	Optional. Indicates the account to login on FTP server where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is FTP.
collaborateAttachmentsFTP_directory	Optional. Indicates the directory on FTP server from where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is FTP.
collaborateAttachmentsFTP_transfertype	Optional. Indicates the file transfer type on FTP server used by Distributed Marketing to get the attachments if the parameter **collaborateModeForAttachments** is FTP. The value can be ASCII or BINARY. The default is ASCII.
collaborateAttachmentsFTP_deletefile	Optional. The value true indicates the original files will be deleted after copy. The default is false if the parameter **collaborateModeForAttachments** is FTP.
collaborateAttachmentsHTTP_url	Indicates the HTTP URL where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is HTTP.
collaborateAttachmentsHTTP_deletefile	Optional. The value true indicates the original files will be deleted after copy. The default is false if the parameter **collaborateModeForAttachments** is HTTP.
collaborateAttachmentsTFTP_server	Indicates the server where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is TFTP.
collaborateAttachmentsTFTP_port	Optional. Indicates the port where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is TFTP.

Parameters	Description
collaborateAttachmentsTFTP_directory	Optional. Indicates the directory from where Distributed Marketing takes the attachments if the parameter **collaborateModeForAttachments** is `TFTP`.
collaborateAttachmentsTFTP_transfertype	Optional. Indicates the file transfer type on server used by Distributed Marketing to get the attachments if the parameter **collaborateModeForAttachments** is `TFTP`. The valid values are `ASCII` or `BINARY`. The default is `ASCII`.
listManagerEnabled	Optional. Determines if marketers can view the List Manager section on the Summary tab: • true: the List Manager section displays (default) • false: hides the List Manager section If you disable the List Manager, you do not need to configure the List Manager configuration files. ☼ The data source to the ListManager table must be active to update list size after generation.
listManagerSearch screenMaxrow	Indicates the maximum number of rows that will be returned on search screen. The default is `1000`.
mergeEnabled	Determine whether or not the merge of documents will be enabled: • true: the merge is enabled (default). • false: the merge is disabled
mergeFullWritePath	When the merge feature is enabled, this parameter specifies the full path to merged data file on the local machine. The default is `c:\temp`.
mergeDataLimitSize	Indicates the upper limit for the size of the date to merge in Microsoft Word. The size is specified in rows (for example, a value of `100` indicates a the merged file cannot contain more than 100 rows). That is, if the number of rows in the file is greater than the value of this parameter, merge is not enabled for this file. The default is `1000`.
maximumItemsToBeDisplayedInCalendar	The maximum number of objects the system displays on calendars. Use this parameter to restrict users' view of calendars to a specific number of objects. A setting of `0`, the default, indicates there is no restriction.

Parameters	Description
enableEditProjectCode	If set to `true`, you can edit the List Code when on the Summary page of the New List wizard. If set to `false`, you cannot edit the List Code.
listManagerListPageSize	The number of rows displayed on a page in List Manager. The default is `20`.
listManagerListMaxrow	The maximum number of rows displayed in a list. The default is `1000`.
flowchartServiceSchedulerServices10ThrottleType	Optional. Defines the type of control put on the number of flowcharts that can run simultaneously. Select one of the following values: • 0: no throttling (throttle value is ignored) • 1: throttle per flowchart instance • 2: throttle all flowcharts (default)
flowchartServiceSchedulerServices10ThrottleValue	Optional. Defines the maximum number of flowcharts that can be run simultaneously on the system. Enter a positive number: • Minimum value: 1 • Maximum value: 150 • Default value: 10
multipleLocaleInstance	Optional. When this parameter is enabled, Distributed Marketing prepends List and On-demand Campaign IDs with the locale identifier for the instance. Since each Distributed Marketing instance can have only one locale identifier, this ensures that the List and On-demand Campaign IDs are unique across a multiple Distributed Marketing environment. • true: adds locale identifier to list and On-demand campaign IDs • false: does not add locale identifier (default)
minimumDelayForExecutionMonitoring	Optional. Defines the minimum delay, in seconds, for an execution before it appears on the Flowcharts Run Monitoring page. The default is `10,800` seconds (3 hours).
runHistoryKeep_LIST	Number of run history records to keep for a LIST project. If the value is <=0, Distributed Marketing keeps all run history records. The default value is `-1`.
runHistoryKeep_LOCAL	Number of run history records (for a List or Campaign flowchart or) to keep for a local project. If the value is <=0, Distributed Marketing keeps all run history records. The default value is `-1`.

Parameters	Description
runHistoryKeep_CORPOR ATE	Number of run history records (for each run flowchart task) to keep for a corporate project. If the value is <=0, Distributed Marketing keeps all run history records. The default value is `-1`.

Performance parameters

Distributed Marketing supports two parameters you can use to configure performance:

- **commonDataAccessLayerFetchSize**

   This parameter is a performance optimization that sets the batch size of some performance-sensitive queries. The fetch size is used to determine how many records in the result set are returned to the application at one time. The default setting is `500`:

   `<UAPInitParam commonDataAccessLayerFetchSize="500"/>`

- **commonDataAccessLayerMaxResultSetSize**

   This parameter crops all list page result sets that are longer than the specified value. For example, the following line limits all lists to 10,000 items, the default value:

   `<UAPInitParam commonDataAccessLayerMaxResultSetSize="10000"/>`

List Manager configuration parameters

All List Manager configuration parameters have the following format:

`<UAPInitParam parameter-name="value">`

Parameter	Description
listManagerResetToValidateIsAllowed_li st	By default, when this property is set to `false`, you have the following actions when validating proposed contacts from a List: • To Validate > Approved • To Validate > Removed • Added > Removed • Approved > Removed • Removed > Approved If you set this property to `true`, you can also reset a selection if you made an error with the addition of the following actions: • Removed > To Validate • Approved > To Validate

Parameter	Description
listManagerResetToValidateIsAllowed_local	By default, when this property is set to `false`, you have the following actions when validating proposed contacts from an On-demand Campaign list: • To Validate > Approved • To Validate > Removed • Added > Removed • Approved > Removed • Removed > Approved If you set this property to `true`, you can also reset a selection if you made an error with the addition of the following actions: • Removed > To Validate • Approved > To Validate
listManagerResetToValidateIsAllowed_corporate	By default, when this property is set to `false`, you have the following actions when validating proposed contacts from an Corporate Campaign list: • To Validate > Approved • To Validate > Removed • Added > Removed • Approved > Removed • Removed > Approved If you set this property to `true`, you can also reset a selection if you made an error with the addition of the following actions: • Removed > To Validate • Approved > To Validate

The following table summarizes the behavior when setting these parameters:

Records status/Behavior	ResetToValidateIsAllowed=false	ResetToValidateIsAllowed=true
To Review	Three radio buttons: **To review**, **Accept**, **Delete**.	Three radio buttons: **To review**, **Accept**, **Delete**.
Accepted	Check box, **Delete**.	Two radio buttons: **To review** and **Delete**.
Deleted	Check box, **Accept**.	Three radio buttons: **To review**, **Accept**, **Delete**.
Added	Check box, **Delete**.	Check box, **Delete**.

Alerts refresh parameters

By default, the system updates the alerts count every three minutes (180 seconds). You can change the default to any value you wish, by editing the collaborate_config.xml file.

Your configuration file may or not contain the alerts refresh property.

If your collaborate_config.xml file contains the alerts count refresh parameter (alertCountRefreshPeriodInSeconds), you can change the value as desired, for example to 60 as shown here:

```
<UAPInitParam alertCountRefreshPeriodInSeconds="60"/>
```

If your collaborate_config.xml file does not contain this parameter, add it before the </UAPInitParameters> line.

☼ Changing the refresh period to poll faster may have performance implications in a multi-user environment.

About mapping Distributed Marketing tables in Campaign

You must map the following tables in the Distributed Marketing system database in Campaign:

- uacc_lists

- uacc_ondemand_lists

- uacc_corporate_lists

For information on mapping tables, see the *Campaign Administrator's Guide*.

About configuring territories for subscriptions

In order to use the Subscriptions feature in Distributed Marketing, you must define territories and assign users to territories in an xml file and then load the territory information into your Distributed Marketing database.

☼ You must set up Distributed Marketing users in the Marketing Platform before loading the territory information.

You can view sampe territory data in the file `TerritoriesSampleData.xml`, in the *Marketing Platform-home*\ `DistributedMarketing\tools\admin\sample_templates\xml` directory.

To load territory data into the Distributed Marketing database

All files referenced in this task are located in the *Marketing Platform-home*`\DistributedMarketing\tools\admin\loadTerritories` directory.

1. Create the xml file that contains the territory definitions and user assignments.

2. Specify the database properties in the `loadTerritories.properties` file.

3. Edit the `loadTerritories.bat` (on Windows) or `loadTerritories.sh` (on UNIX) file:

   a. Set the value of the **DB_JAR_CLASSPATH** parameter to the full path to the JDBC driver libraries.

   b. Change the Java classpath value in the `GOOD_TO_TO` section to specify the full path for the JDK installation.

   For example, change:

   ```
   java -cp .;loadTerritories.jar;%DB_JAR_CLASSPATH%;log4j.jar;
   com.unicacorp.uap.subscription.loadTerritories.LoadTerritories %*
   ```

   to

   ```
   c:\bea\java\jdk\java -
   cp .;loadTerritories.jar; %DB_JAR_CLASSPATH%;log4j.jar;
   com.unicacorp.uap.subscription.loadTerritories.LoadTerritories %*
   ```

4. Run the load file for your system using the following syntax:

   ```
   loadTerritories [path]file
   ```

   If the territory definitions file is not located in the *Marketing Platform-home*`\DistributedMarketing\tools\admin\loadTerritories` directory, provide the full path, enclosed in quotation marks.

   For example:

   ```
   loadTerritories":\IBM\xml\salesTerritories.xml"
   ```

   When the script completes, a message indicates if the import ended with or without errors. Errors are recorded in the file `loadterritories.log`. If any errors are reported, correct the errors and run the script again.

About defining milestones

You can define the milestones that appear in the Workflow tab of Advanced Lists, On-demand Campaigns, and Corporate Campaigns. To define the milestones that users can select, open the `uap_wf_milestone` system table.

You customize available milestones by inserting new milestones and deleting the default milestones that you do not intend to use.

Your milestones must have an ID greater than zero. If you have older milestones with IDs of zero (that is, the `milestone_type` column contains entries equal to 0), you can run the following SQL statements to change the IDs:

An example of a SQL command that could be used to define a new milestone appears below. In this example, `20` is a unique Milestone type identifier, and `Signoff` is the name of a type of milestone:

```
INSERT INTO uap_wf_milestone VALUES (20, 'Signoff');
```

About the system log file

The Distributed Marketing system log file is named `system.log`, and is located in the *Marketing Platform-home*`\DistributedMarketing\logs` directory.

Changing the system log file location

To change the name or location of the system log file, you change the value of the **-Dcollaborate.system.logfile** parameter in your Web application server.

For example, the following line specifies that the location of the Distributed Marketing system log is called `Unica_DM_system.log` and located in `C:\logs`:

```
-Dcollaborate.system.logfile=C:\logs\Unica_DM_system.log
```

If you are using WebLogic, you add this option to the `startWeblogic.cmd` file. For details, see your WebLogic documentation.

If you are using WebSphere, you add the option in the Generic JVM Arguments section in the WebSphere Administration Console. For details, see your WebSphere documentation.