

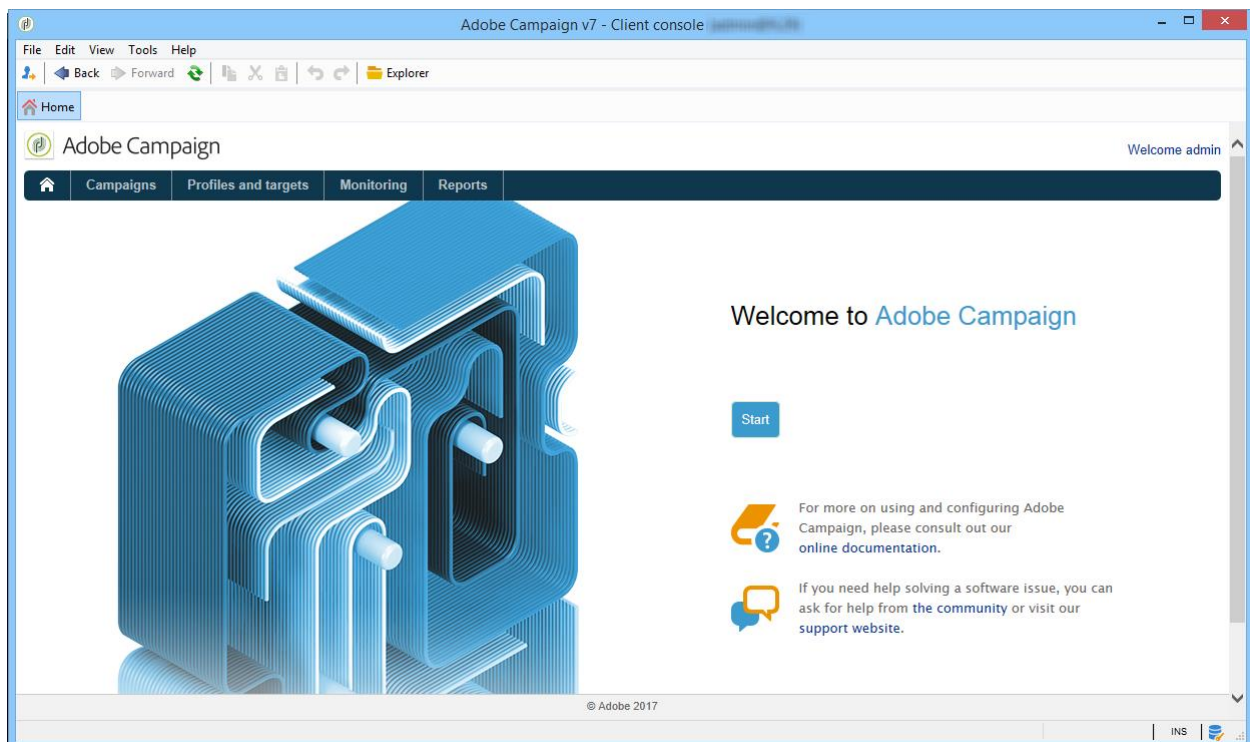
Module 3: Data Operations


3.1 Adobe Campaign workspace

Explore Adobe Campaign interface

Once you are connected to the database, you will access the Adobe Campaign home page, which is a dashboard: it is made up of links and shortcuts which let you access capabilities, depending on your installation as well as general platform configurations.

From the central section of the home page, you can use links to access Campaign online documentation portal, forum and the support website.



 Discover Campaign workspace in [video](#)

NOTE

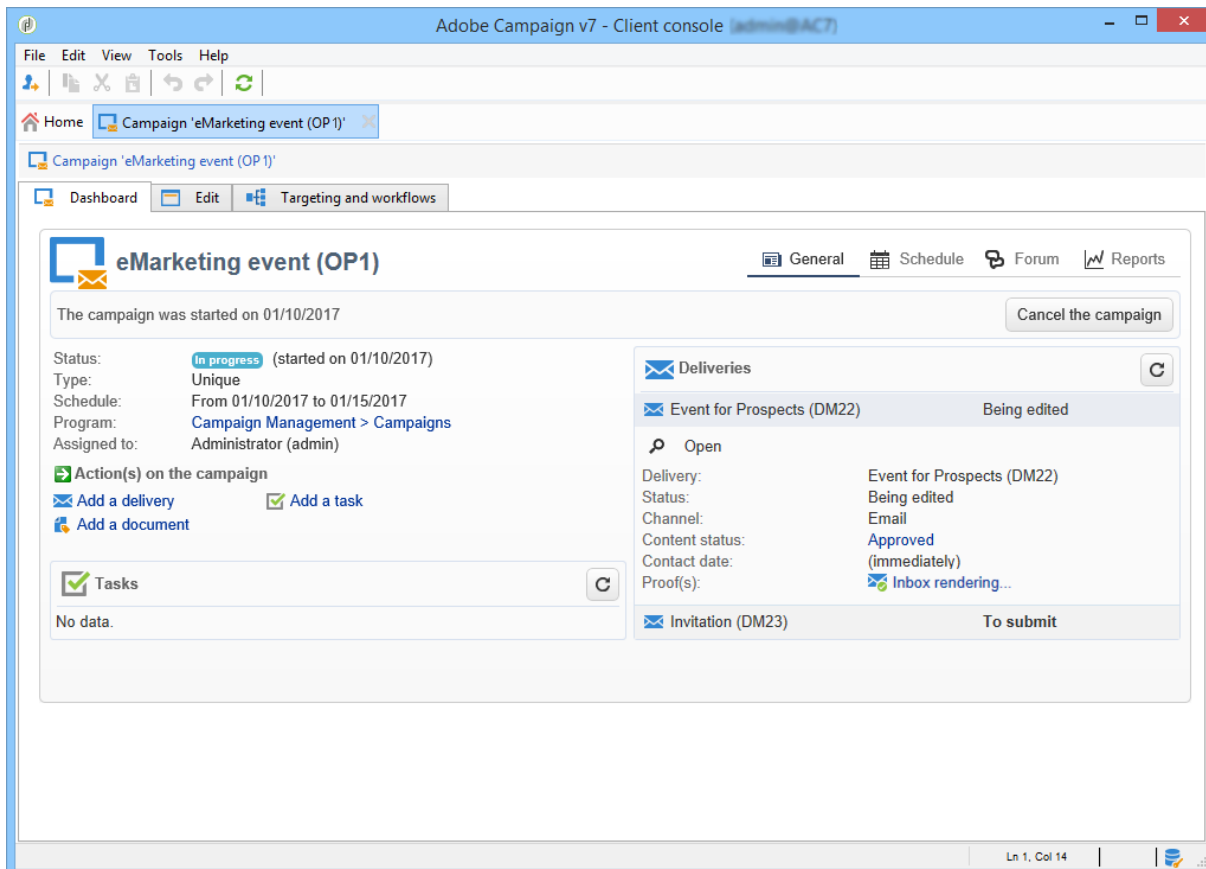
Adobe Campaign capabilities available on your instance depend on modules and add-ons installed. Some of them may also not be available, depending on your permissions and specific configurations.

Before installing any module or add-on, you need to check your license agreement or contact your Adobe account executive.

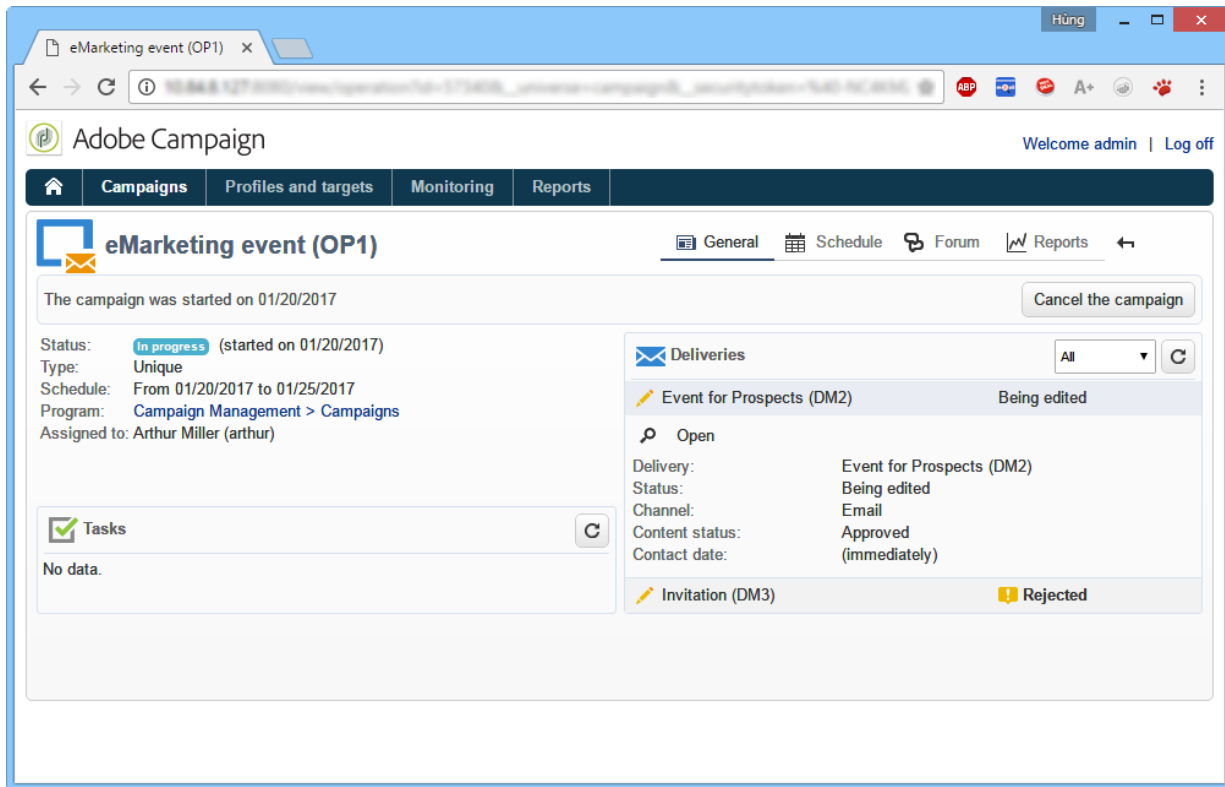
Console and web access

The Adobe Campaign platform is accessible via a console or via an internet browser. See the compatible browsers in the [compatibility matrix](#).

The web access interface is similar to the console interface. From a browser, you can use the same navigation and display features as in the console, but you can perform only a reduced set of actions on campaigns. For example, you can view and cancel campaigns, but you cannot modify campaigns. For a given operator, a campaign will show up with the following options in the console:



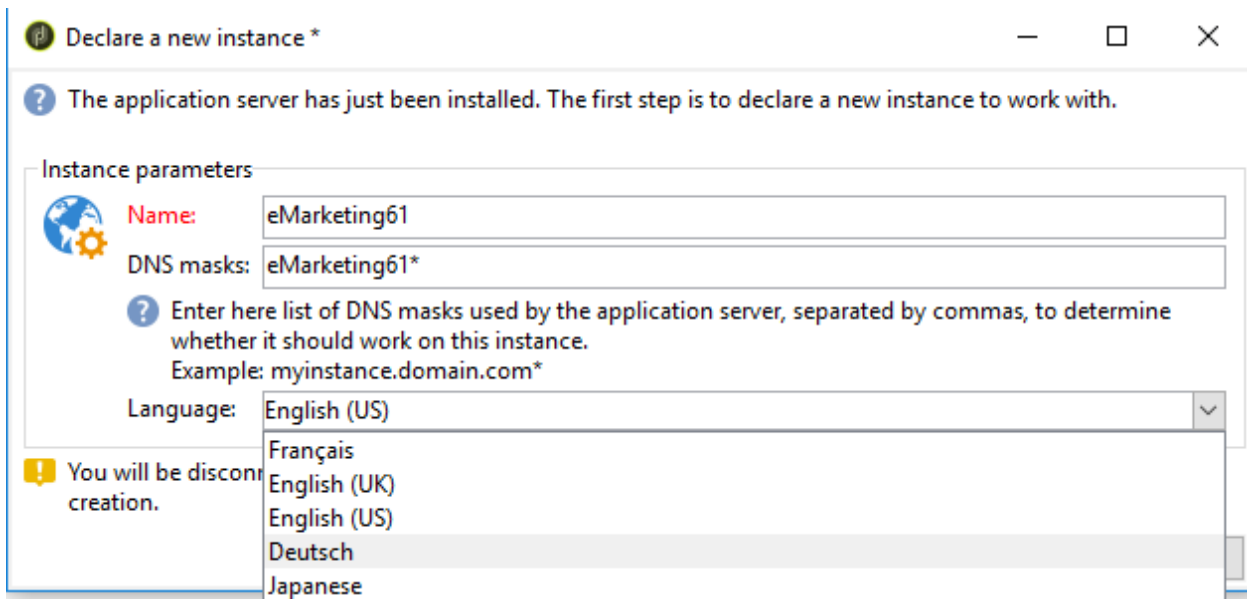
Whereas with web access, the options will mainly enable viewing:



Learn more about [using the web interface](#).

Languages

The language is selected when installing your Adobe Campaign Classic instance.



You can choose between five different languages:

- English (UK)
- English (US)
- French
- German
- Japanese

The language you chose for your Adobe Campaign Classic instance might impact date and time formats. For more on this, refer to this [section](#).

For more information on how to create an instance, refer to this [page](#).

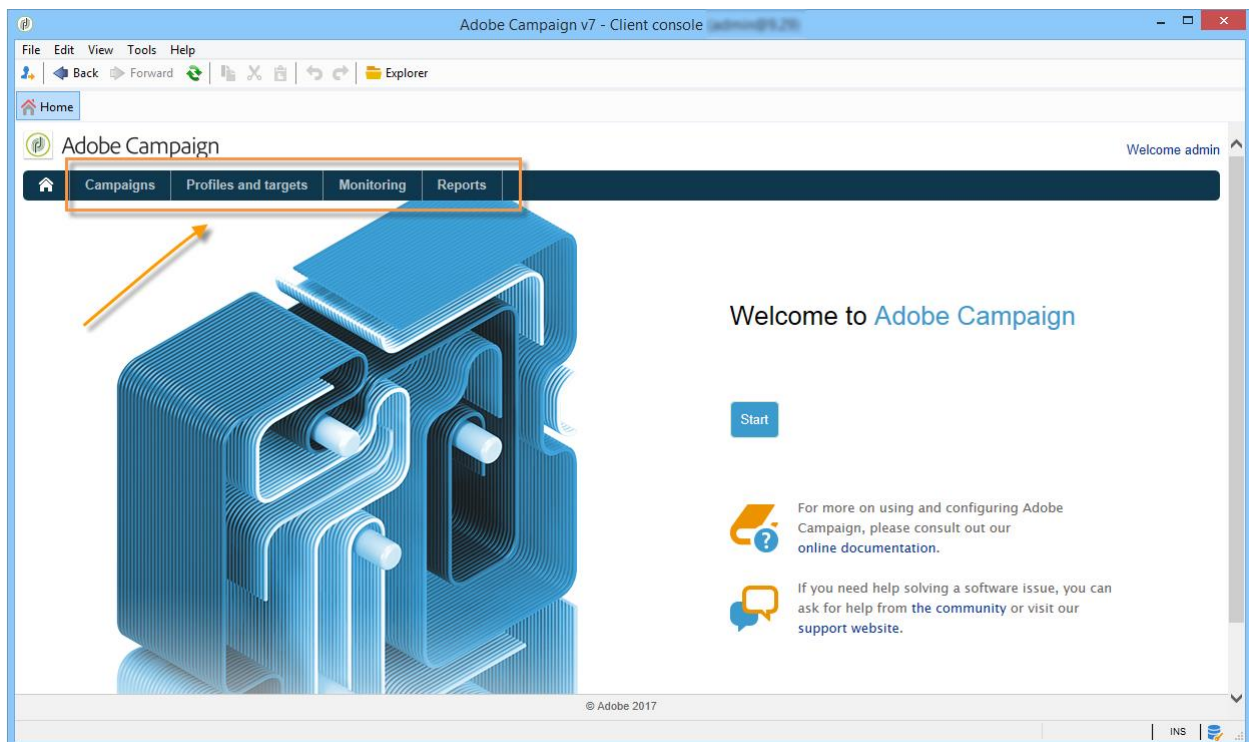
CAUTION

The language cannot be changed after the instance creation.

Navigation basics

Browse pages

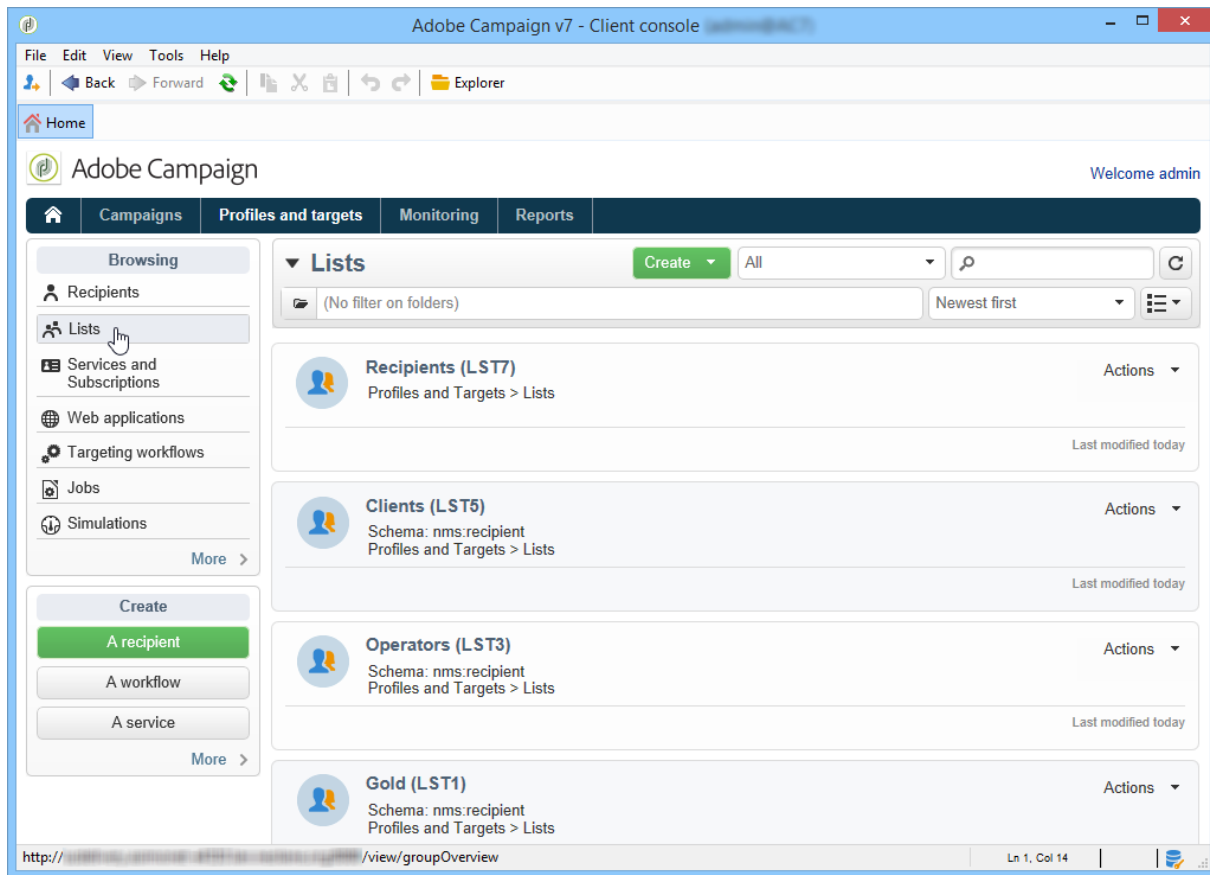
The various functionalities of the platform are broken down into core capabilities: use the links that you see in the top section of the interface to access them.



The list of core capabilities you can access depends on the packages and add-ons you have installed and on your access rights.

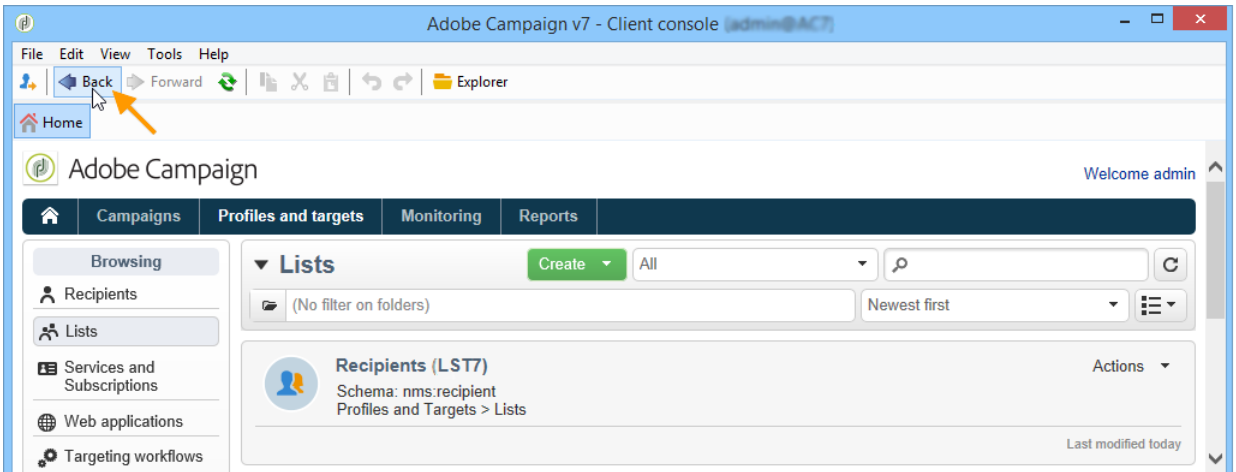
Each capability includes a set of functionalities based on task related needs and use context. For instance, the **Profiles and targets** link gets you to the recipient lists, subscription services, existing targeting workflows and the shortcuts for creating these elements.

The lists are available via the **Lists** link in the left-hand section of the **Profiles and Targets** interface.

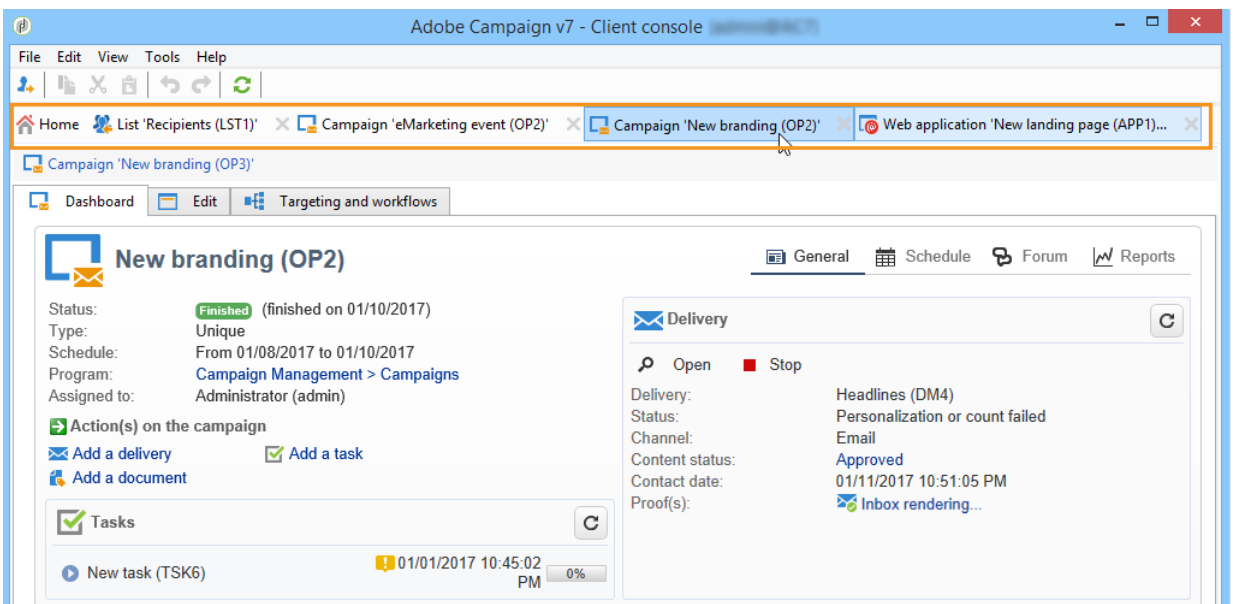


Use tabs

- When you click a core capability or a link, the relevant page replaces the current page. To go back to the previous page, click the **Back** button on the toolbar. To return to the home page, click the **Home** button.



- In the case of a menu or a shortcut to a display screen (such as a web application, program, delivery, report, etc.), the matching page is displayed in another tab. This enables you to browse from one page to the other using the tabs.

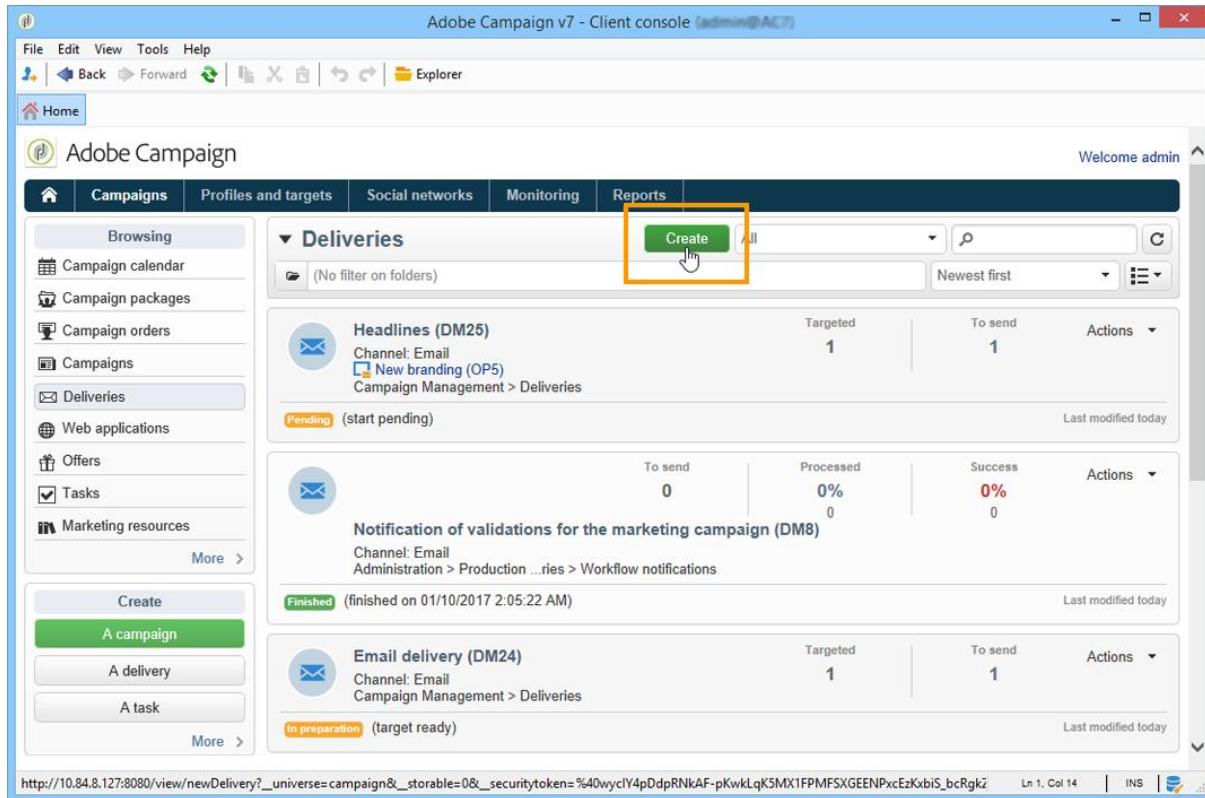


Create an element

Each core capability section lets you browse among the available elements. To do this, use the shortcuts in the **Browsing** section. The **Other choices** link lets you access all other pages, regardless of environment.

You can create a new element (delivery, Web application, workflow, etc.) using the shortcuts in the **Create** section on the left of the screen. Use the **Create** button above the list to add new elements to the list.

For example, on the delivery page, use the **Create** button to create a new delivery.



Formats and units

Date and time

The language of your Adobe Campaign Classic instance impacts date and time formats.

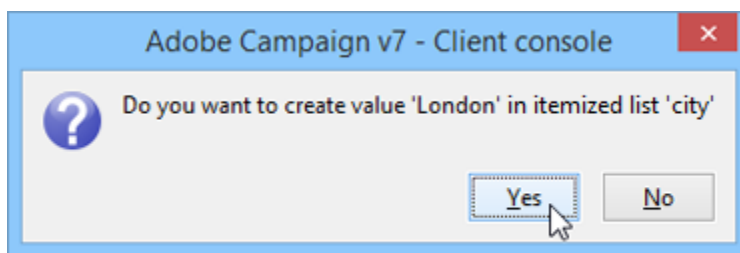
Language is selected when installing Campaign, and cannot be changed afterwards. You can select: English (US), English (EN), French, German or Japanese. For more on this, refer to [this page](#).

Main differences between US English and UK English are:

| Formats | English (US) | English (EN) |
|----------------------|---|--|
| Date | Week starts on Sunday | Week starts on Monday |
| Short date | %2M/%2D/%4Y ex: 09/25/2018 | %2D/%2M/%4Y ex: 25/09/2018 |
| Short date with time | %2M/%2D/%4Y %I:%2N:%2S %P ex: 09/25/2018 10:47:25 PM | %2D/%2M/%4Y %2H:%2N:%2S ex: 25/09/2018 22:47:25 |

Add values in an enumeration

Using the input fields with a drop-down list, you can enter an enumeration value, which can be stored and then offered as an option in the drop-down list. For example, in the **City** field of the **General** tab of a recipient profile, you can enter London. When you press Enter to confirm this value, a message asks if you want to save this value for the enumeration associated with the field.



If you click **Yes**, this value will be available in the combo box of the relevant field (in this case: **London**).

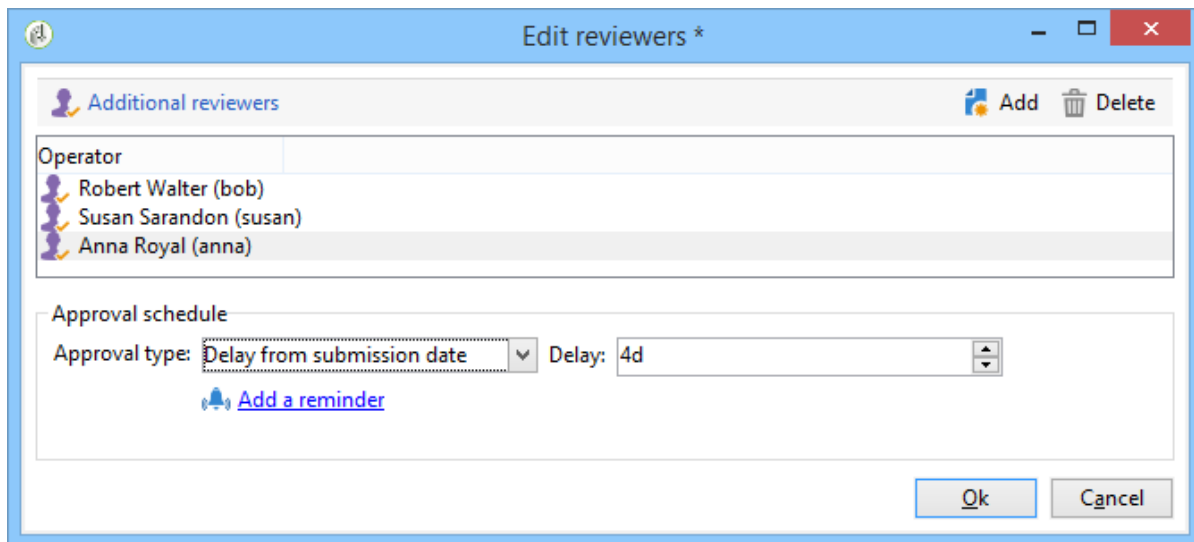
NOTE

Enumerations (also known as ‘itemized lists’) are managed by the administrator via the **Administration > Platform > Enumerations** section. For more on this, refer to [Managing enumerations](#).

Default units

In the fields that express a duration (e.g. validity period of the resources of a delivery, approval deadline for a task, etc.), the value can be expressed in the following **units**:

- **s** for seconds,
- **mn** for minutes,
- **h** for hours,
- **d** for days.



Tutorial video

This video presents Campaign Classic workspace:

<https://experienceleague.adobe.com/docs/campaign-classic/using/getting-started/starting-with-adobe-campaign/campaign-workspace/adobe-campaign-workspace.html?lang=en#video>

Additional Campaign Classic how-to videos are available [here](#).

3.2 Get started with workflows

About workflows

Adobe Campaign includes a workflow module that empowers you to orchestrate the full range of processes and tasks across the different modules of the application server. This comprehensive graphical environment lets you design processes including segmentation,

campaign execution, file processing, human participation, etc. The workflow engine executes and tracks these processes.

You can use a workflow, for example, to download a file from a server, decompress it, and then import records contained within into the Adobe Campaign database.

A workflow can also involve one or more operators to be notified or who can make choices and approve processes. In this way, it is possible to create a delivery action, assign a task to one or more operators to work on content, specify targets, and to approve proofs before starting the delivery.

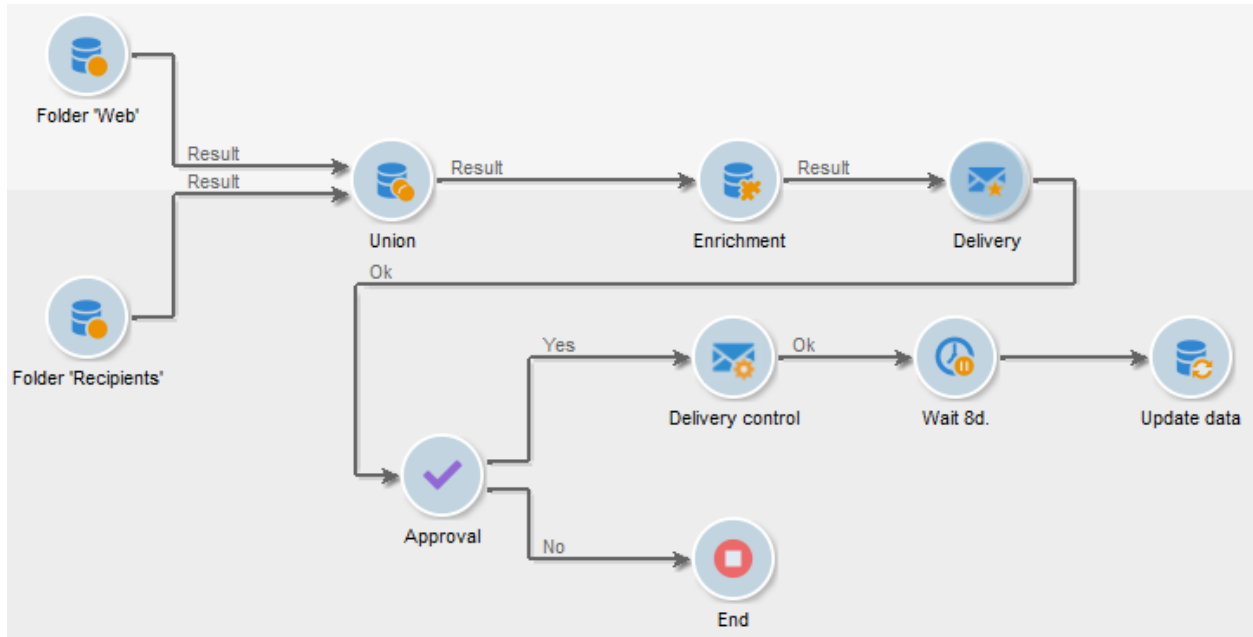
Workflows occur within various contexts and stages of the campaign management process.

Adobe Campaign uses workflows to:

- Carry out targeting campaigns. [Learn more](#)
- Build campaigns: for each campaign, the **Workflow** tab lets you build the target and create the deliveries. [Learn more](#)
- Perform technical processes: cleanup, collecting tracking information or provisional calculations. [Learn more](#)

A workflow can mean both a process definition (the workflow model, which is a representation of what is supposed to happen) and an instance of this process (a workflow instance, which is a representation of what is actually happening).

The workflow template describes the various tasks to be performed and how they are linked together. The task templates are called activities and are represented by icons. They are linked together by transitions.



Each workflow contains:

- **Activities**

An activity describes a task template. The various activities available are represented on the diagram by icons. Each type has common properties and specific properties. For example, while all activities have a name and label, only the **Approval** activity has an assignment.

In a workflow diagram, a given activity can produce multiple tasks, in particular when there is a loop or recurrent (periodic) actions.

All workflow activities are listed in [this section](#), including use cases and samples.

- **Transitions**

Transitions enable you to link activities and to define their sequence. A transition links a source activity to a destination activity. There are several sorts of transitions, which depend on the source activity. Some transitions have additional parameters such as a duration, a condition or a filter.

A transition which is not linked to a destination activity is colored orange and the arrow head is shown as a diamond.

NOTE

A workflow containing unterminated transitions can still be executed: a warning message will be generated and the workflow will pause once it reaches the transition but it will not generate an error. It is thus possible to start a workflow without it being finished and to add to it as you go along.

For more information about how to build a workflow, refer to [this section](#).

- **Worktables**

The worktable contains all the information carried by the transition. Each workflow uses several worktables. The data conveyed in these tables can be accelerated and used throughout the workflow's life cycle, as long as it is not purged. Indeed, unneeded tables are purged each time the workflow is passivated, and possibly during the execution of the largest workflows to avoid overloading the server.

Learn more on workflow data and tables in [this section](#).

Key principles and best practices

Refer to these sections to find guidance and best practices to automate processes with workflows:

- Learn more about workflow activities in [this page](#).
- Learn how to build a workflow in [this section](#).
- Discover how to use workflows to import data in Campaign in [this section](#).
- Workflow best practices are detailed in [this page](#).
- Find guidance about workflow execution in [this section](#).
- Learn how to monitor workflows in [this page](#).
- Learn how to grant access to users to use workflows in [this page](#).

3.3 Targeting activities in workflows

These activities let you build one or more targets by defining sets and splitting or combining these sets using intersection, union, or exclusion operations.

- **Query:** lets you run a query. Refer to [Creating a query](#).
- **Incremental query:** lets you perform a query and plan its execution. Refer to the [Incremental query](#) section.
- **Read list:** lets you use data contained in a list. Refer to the [Using data from a list: Read list](#) section.
- **Union:** lets you group the result of several activities into a single target. Refer to the [Union](#) section.
- **Intersection:** lets you extract only the population with the same inbound activity results. Refer to the [Intersection](#) section.

- **Exclusion:** lets you create a target based on a main target from which one or more other targets are extracted. Refer to the [Exclusion](#) section.
- **Split:** lets you split a target into several subsets. Refer to the [Split](#) section.
- **Cells:** provides a view of the various subsets in the form of data columns, and facilitates the manipulation of these subsets when there are many of them. For more on this, refer to the [Cells](#) section.
- **Offers by cell:** lets you link different offers to each subset of a population. Refer to the [Offers by cell](#) section.
- **Survey answers:** lets you recover information collected during a survey. For more on this, refer to this [section](#).
- **Delivery outline:** lets you add a delivery outline. Refer to the [Delivery outline](#) section.
- **Enrichment:** lets you add columns to a working table or workflow. Refer to the [Enrichment](#) section.
- **Edit schema:** lets you transform, standardize, and if necessary enrich data. For more on this, refer to the [Edit schema](#) section.
- **Offer engine:** lets you call the Interaction offer engine in a workflow. Refer to the [Offer engine](#) section.
- **Deduplication:** lets you remove duplicates from inbound activities. Refer to the [Deduplication](#) section.
- **Change dimension:** lets you change the targeting dimension during the workflow construction cycle. Refer to the [Change dimension](#) section.
- **Subscription services:** lets manage target subscriptions and unsubscriptions to an information service. Refer to the [Subscription Services](#) section.
- **List update:** records the result of inbound activities in a list. Refer to the [List update](#) section.
- **Update data:** lets you massively update the data in the database. Refer to the [Update data](#) section.
- **CRM connector:** lets you configure the synchronization between Adobe Campaign and a CRM. Refer to the [CRM Connector](#) section.
- **Change data source:** lets you change the data source of a workflow **Working table**. This provides more flexibility to manage data across different data sources such as FDA, FFDA and local database. Refer to the [CRM Connector](#) section

3.4 Get started with profiles

Profiles are centralized in the Adobe Campaign database. There are many possible mechanisms for acquiring profiles and building up this database: on-line collection via web forms, manual or automatic import of text files, replication with company databases or other information systems. With Adobe Campaign, you can incorporate marketing history, purchase information, preferences, CRM data, and any relevant PI data in a consolidated view to analyze and take action.

“**Profile**” means a record of information (e.g.: a record in the nmsRecipient table or an external table containing a cookie ID, Customer ID, mobile identifier or other information relevant to a particular channel) representing an end-customer, prospect, or lead.

In Adobe Campaign, recipients are the default profiles targeted for sending deliveries (emails, SMS, etc.). Recipient data stored in the database enable you to filter the target that will receive any given delivery and to add personalization data in your delivery contents. Other types of profiles exist in the database. They are designed for different uses. For example, seed profiles are made to test your deliveries before they are sent to the final target.

 [Understand the concept of profiles in video](#)

Profile types

Adobe Campaign lets you manage profiles throughout their entire lifecycle: creation, import, targeting, action tracking, updates, etc.

Each profile matches a database entry. They contain all the information required for targeting, qualifying and tracking individuals.

Profiles can be identified based on storage space. This means that a profile can match: a recipient, a visitor, an operator, a subscriber, a prospect, etc.

Recipient profiles

Delivery recipients are stored in the database as profiles containing the information linked to them: last name, first name, address, subscriptions, deliveries, etc. When you create campaigns, you can define the target of the deliveries to a selection of the profiles in the base according to simple or advanced criteria.

You can also create campaigns aimed at recipients whose profiles are stored not in the database, but in files. These are known as “external” deliveries. For more information about this type of delivery, refer to [this page](#).

The main methods for creating recipient profiles are as follows:

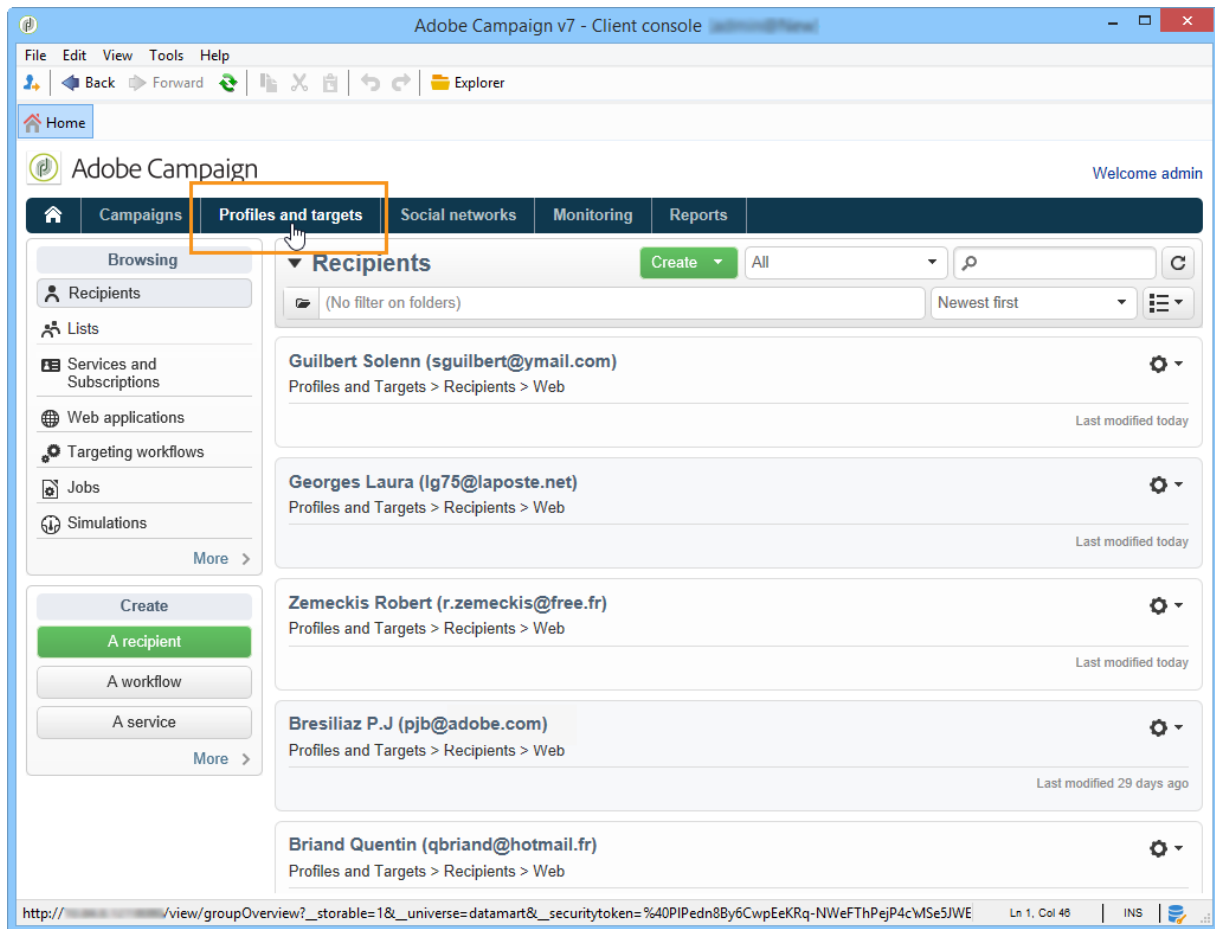
- direct input in the graphical interface screens,
- importing recipient lists,
- on-line collection via web forms.

NOTE

To find out how files and web forms are imported, refer to [Generic imports and exports](#).

Profiles and targets

The **Profiles and targets** link lets you display recipients stored in Adobe Campaign database. You can create new recipient, edit an existing recipient and access its profile. For more on this, refer to [this page](#).



It also gives you access to:

- lists - [Learn more](#)
- subscription services - [Learn more](#)
- web applications - [Learn more](#)
- imports and exports (jobs) - [Learn more](#)
- targeting workflows - [Learn more](#)

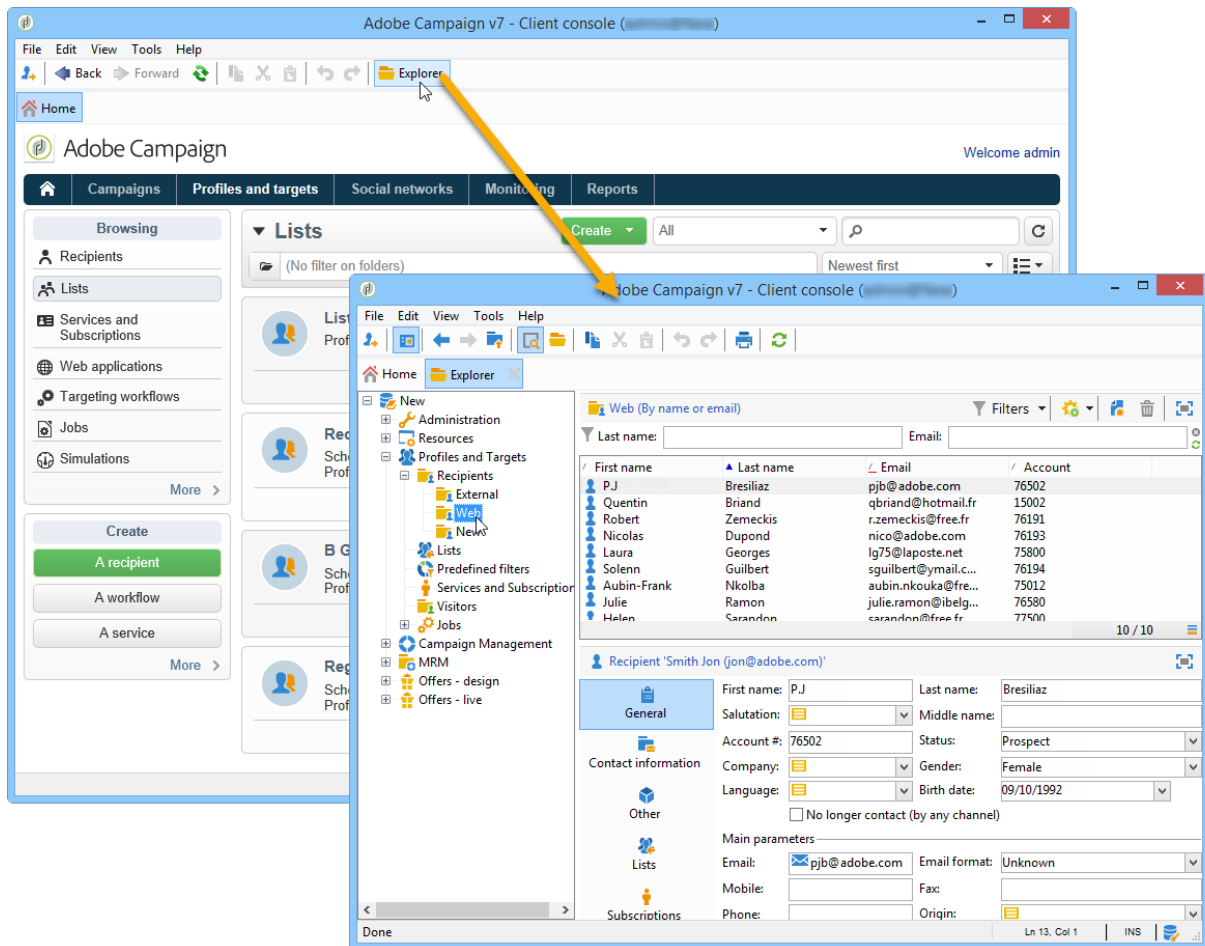
The recipients page lets you perform frequent operations on profiles: edits, updates, adds, deletions, sorts.

For more advanced profile manipulations, you need to edit the Adobe Campaign tree. To do this, click the **Explorer** link on the Adobe Campaign home page.

By default, recipients are stored in the **Profiles and Targets > Recipients** node of the tree. You can create recipients from this view, as well as:

- sort and filter the profiles of the database - [Learn more](#)
- move, copy or delete profiles from the database - [Learn more](#),
- update profiles - [Learn more](#)
- export recipients - [Learn more](#)
- create recipient groups - [Learn more](#)

To access advanced functionalities and configurations, you need to click the **Explorer** icon.



The general layout of the Adobe Campaign explorer is presented in [this page](#).

NOTE

You can also display an advanced view of this list from the Adobe Campaign tree by clicking the **Profiles and targets > Recipients** link. The list display can be configured to suit your needs. You

can add or delete columns, define column order, sort data, etc. List display configuration is described in [this page](#).

You can also define recipient views. For further information about this functionality, refer to [this section](#).

Active profiles

Active profiles are the profiles that are counted for billing purposes.

Billing only concerns profiles that are **active**. A profile is considered active if the profile has been targeted or communicated with in the past 12 months via any channel.

A profile that has been targeted by several deliveries is counted only once.

NOTE

Facebook and Twitter channels are not taken into account.

Active profiles count is available for **Marketing instances** only. It is not available for Execution instances, meaning MID (mid sourcing) and RT (Message Center / Real-time messaging) instances.

NOTE

You can also monitor the number of active profiles on your instance directly from Campaign Control Panel. For more on this, refer to the [Control Panel documentation](#).

Tutorial video

Learn how to access profile data, sort and filter profiles and manually create and manage profiles.

This video also explains the compliance of Adobe Campaign Classic with General Data Protection Regulations.

<https://experienceleague.adobe.com/docs/campaign-classic/using/getting-started/profile-management/about-profiles.html?lang=en#create-profiles-video>

Additional Campaign Classic how-to videos are available [here](#).

See also

- [Privacy management in Campaign](#)

- [Define the target population](#)
- [Create queries and segment data in workflows](#)
- [Select target mapping](#)
- [Define the audience - best practices](#)

3.5 Get started with marketing campaigns

Campaigns include actions (deliveries) and processes (importing or extracting files), as well as resources (marketing documents, delivery outlines). They are used in marketing campaigns. Campaigns are part of a program, and programs are included in a campaign plan.



Discover how to create a marketing plan, programs, and campaigns [in video](#)

To create a marketing campaign:

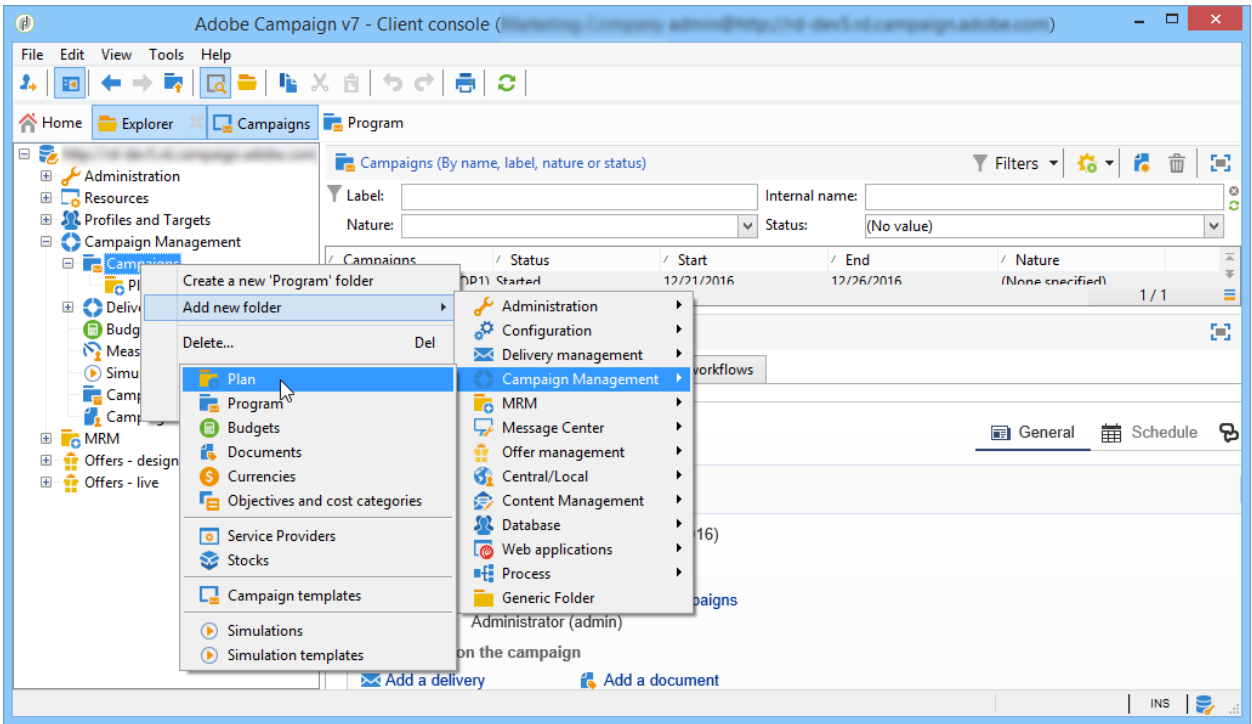
1. Create a campaign: discover campaigns and their characteristics: label, type, start and end dates, budget, associated resources, manager(s) and participants. [Learn more.](#)
2. Define target population(s): create a workflow with targeting queries. [Learn more.](#)
3. Create deliveries: select channel(s) and define the content to be sent. [Learn more.](#)
4. Approve deliveries. [Learn more.](#)
5. Monitor deliveries. [Learn more.](#)
6. Plan campaigns and associated costs. [Learn more.](#)

When these steps have been completed, you can start the deliveries (refer to [this section](#)), check the data, processes and information relating to the deliveries and, if necessary, manage the associated documents (refer to [this section](#)). You can also track the execution of the processing phases of campaigns and deliveries (refer to [this section](#)).

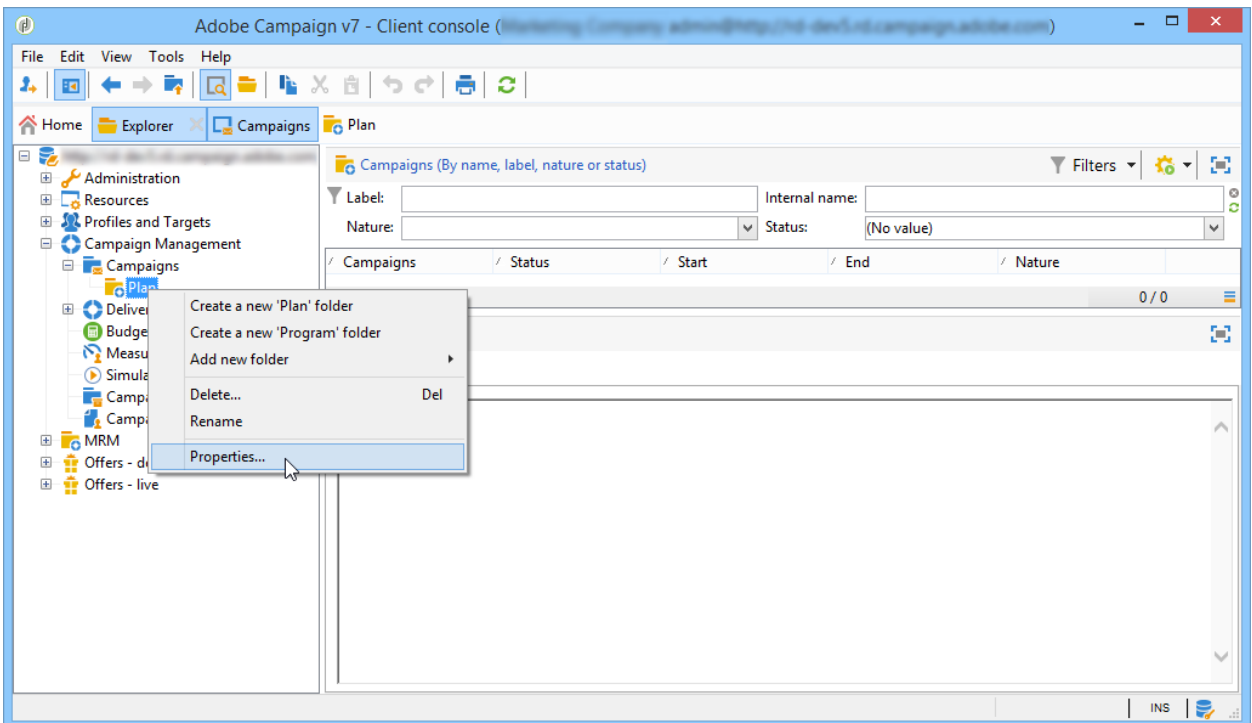
Create plan and program hierarchy

To configure your folder hierarchy for marketing plans and programs:

1. Click the **Explorer** icon on the home page.
2. Right-click the folder in which you want to create your plan.
3. Select **Add new folder > Campaign Management > Plan**.



4. Rename the plan.
5. Right-click the newly created plan and select **Properties...**



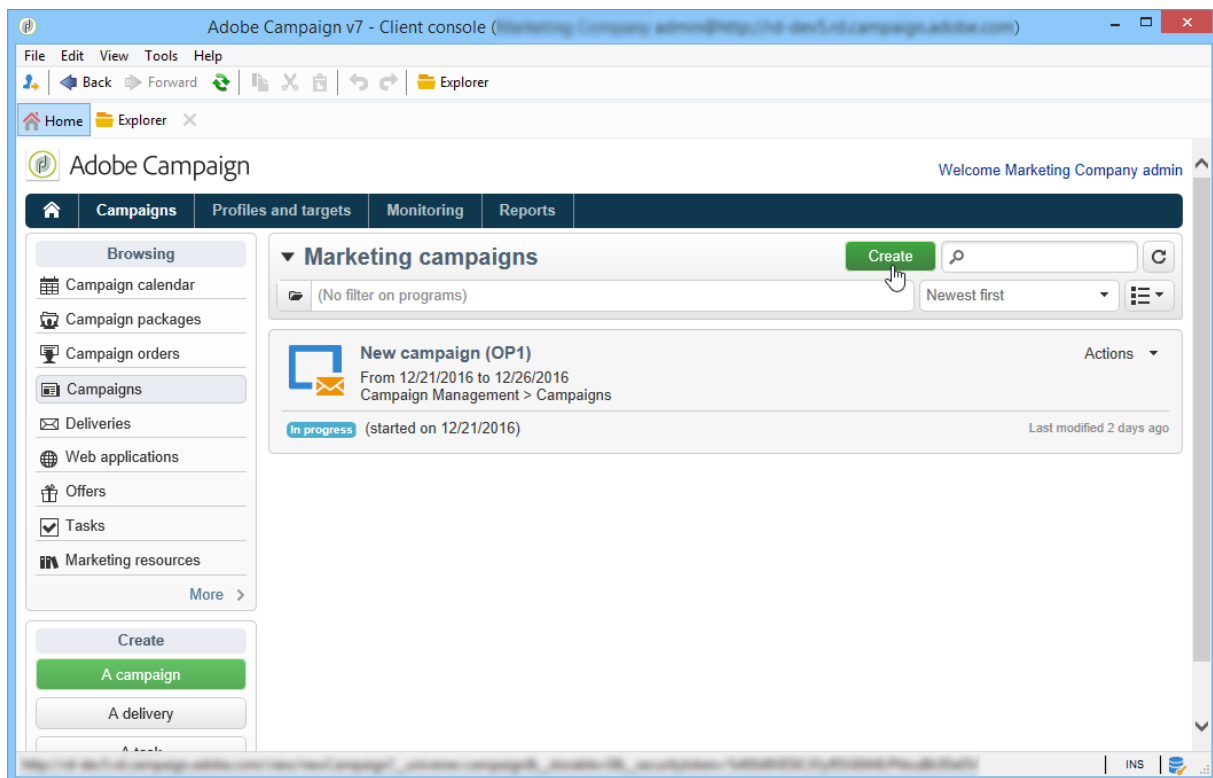
6. In the **General** tab, modify the **Internal name** to avoid duplicates during package exports.

7. Click **Save**.
8. Right-click the newly created plan and select **Create a new 'Program' folder**.
9. Repeat the above steps to rename your new program folder and its internal name.

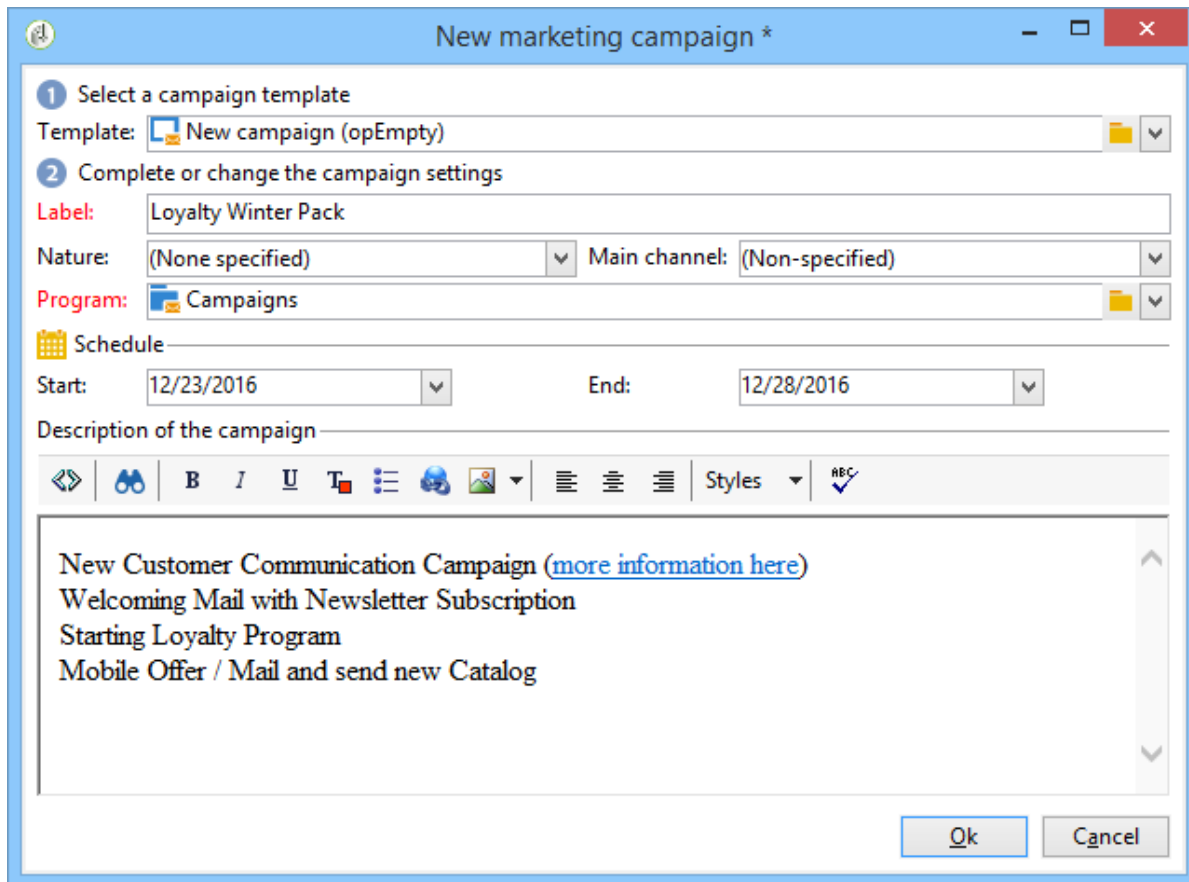
Create a campaign

Add a campaign

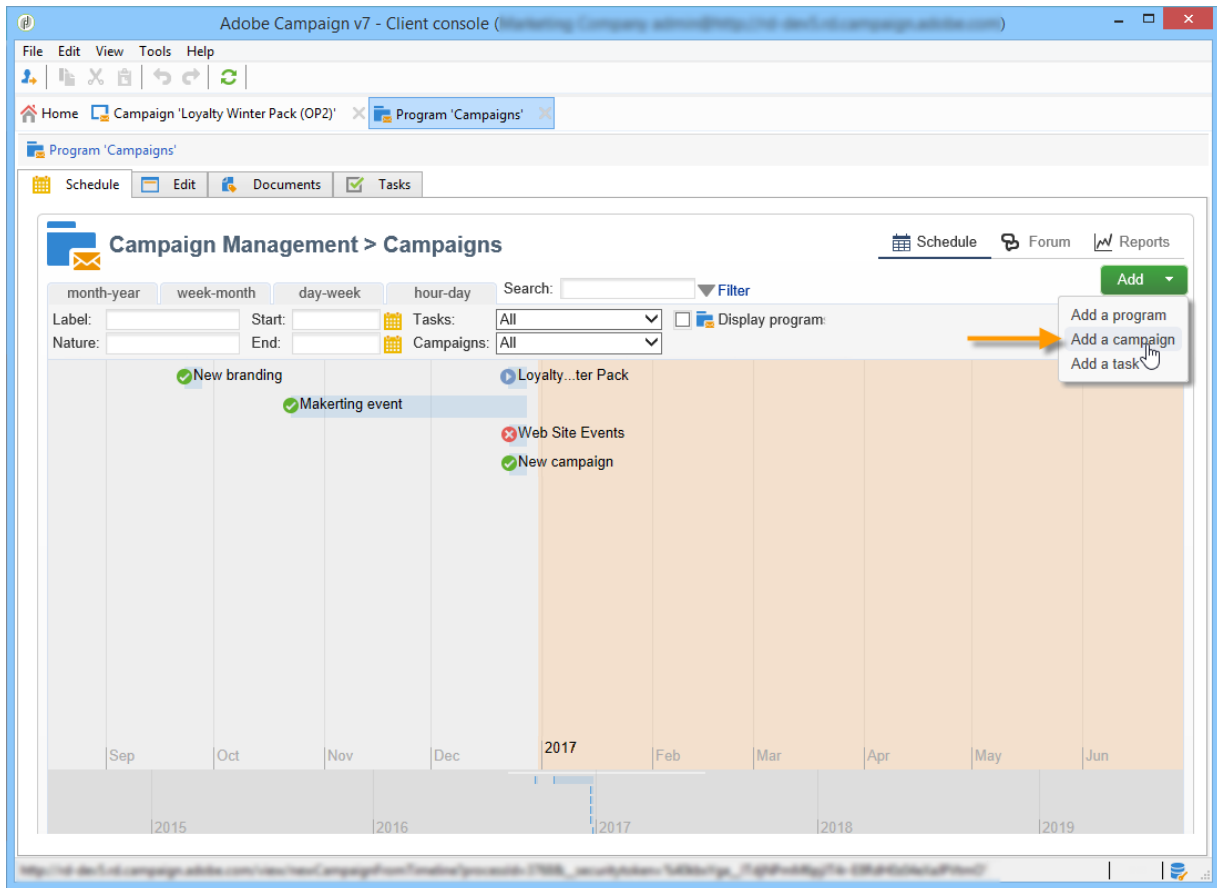
You can create a campaign via the list of campaigns. To display this view, select the **Campaigns** menu in the **Campaigns** dashboard.



The **Program** field lets you select the program to which the campaign will be attached. This information is mandatory.



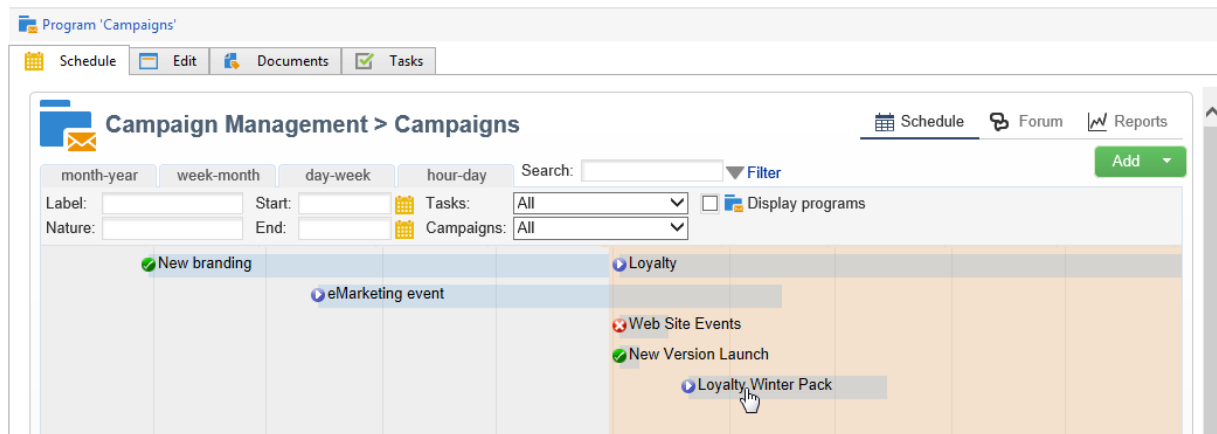
Campaigns can also be created via a program. To do this, click the **Add** button in the **Schedule** tab of the concerned program.



When you create a campaign via the **Schedule** tab of a program, the campaign is automatically linked to the concerned program. The **Program** field is hidden in this case.

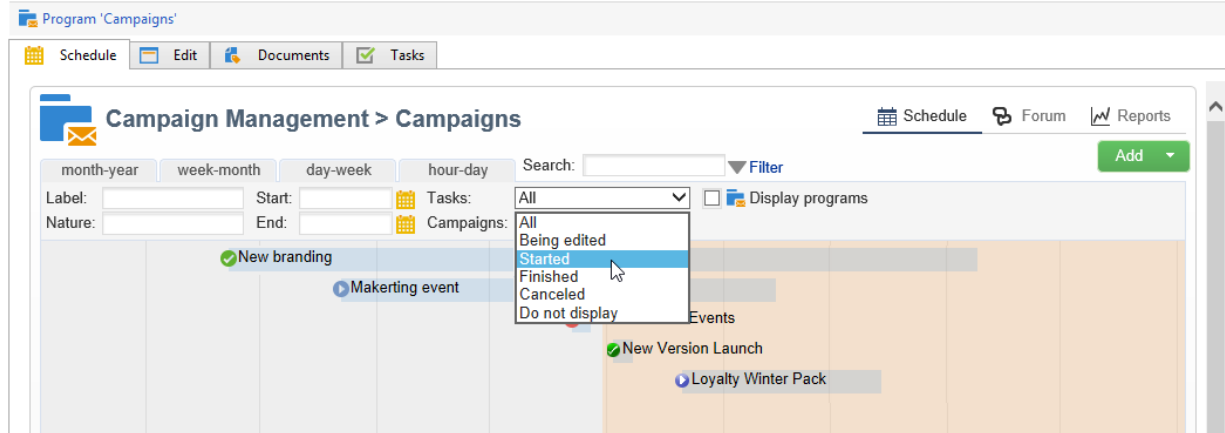
In the campaign creation window, select the campaign template and add a name and a description of the campaign. You can also specify the campaign start and end dates.

Click **OK** to create the campaign. It is added to the program schedule.



NOTE

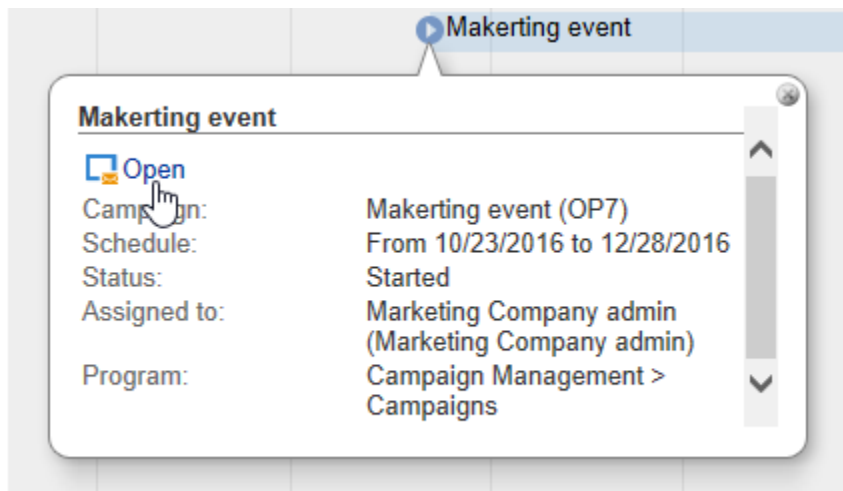
To filter the campaigns to display, click the **Filter** link and select the status of campaigns to display.



Edit and configure a campaign

You can then edit the campaign you have just created and define its parameters.

To open and configure a campaign, select it from the schedule and click **Open**.



This takes you to the campaign dashboard.

Recurring and periodic campaigns

A recurring campaign is a campaign based on a specific template, whose workflows are configured to be executed according to an associated schedule. The workflows will therefore be

recurring within a campaign. The targeting is duplicated on each execution and the various processes and target populations are tracked. It is also possible to execute future targetings in advance, via the coverage period during automatic workflow creation, in order to launch simulations with target estimates.

A periodic campaign is a campaign created automatically according to the execution schedule of its template.

Create a recurring campaign

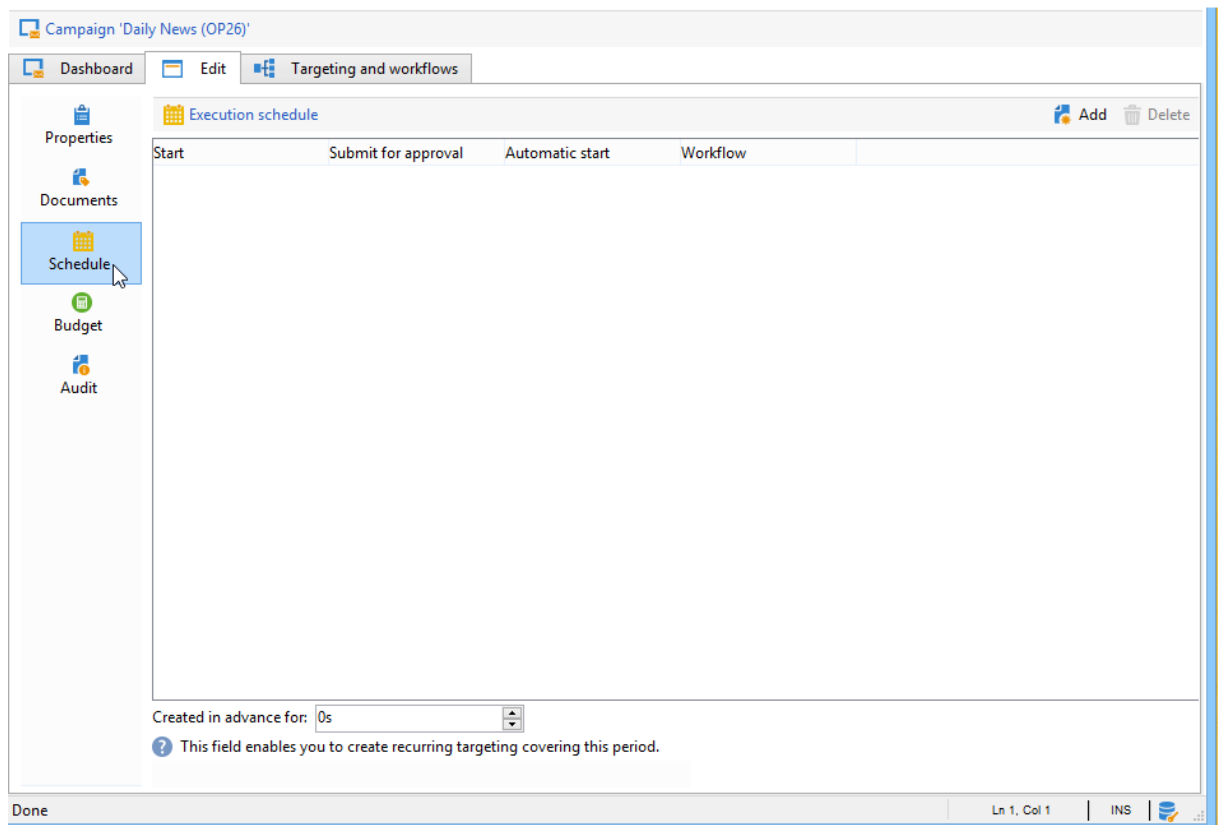
Recurring campaigns are created from a specific template defining the workflow template to be executed and the execution schedule.

Create a template for recurring campaigns

1. Create a **Recurring** campaign template.

NOTE

It is recommended that you duplicate the default template instead of creating an empty template.



2. Enter the name of the template and the duration of the campaign.

The screenshot shows a web application interface for managing campaign templates. At the top, there is a search bar with the text "Campaign templates (By name, label, nature or status)" and a "Filters" dropdown. Below the search bar are input fields for "Label:", "Internal name:", "Nature:", and "Status:". The "Status" field is currently set to "(No value)".

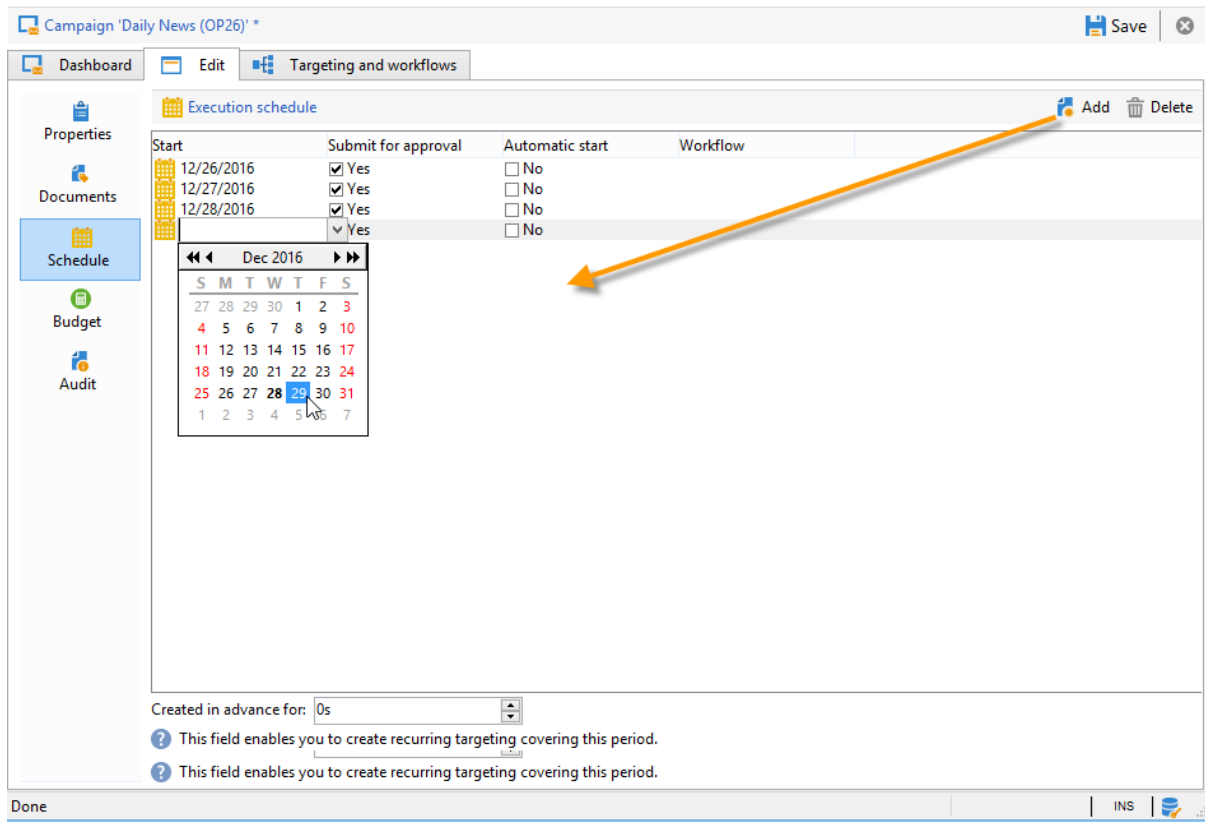
| Campaigns | Operation type | Nature |
|----------------------------------|----------------|------------------|
| New campaign (opEmpty) | Unique | (None specified) |
| Periodic campaign (opPeriodic) | Periodic | (None specified) |
| Recurring campaign (opRecurrent) | Recurring | (None specified) |

A context menu is open over the "Recurring campaign (opRecurrent)" row. The menu items are:

- Configure list...
- Export...
- Select all
- Load all
- No filter
- Pre-configured filters ▶
- And ▶
- Advanced filter...
- Filter on this column
- Distribution of values for this column...
- New
- Duplicate** (highlighted)
- Duplicate to...
- Save (Ctrl+S)
- Cancel
- Delete (Del)
- Actions ▶
- Open
- Open in a new window...

3. For this type of campaign, a **Schedule** tab is added in order to create the template execution schedule.

In this tab, specify the planned execution dates of the campaigns based on this template.



The configuration mode of the execution schedule coincides with the **Scheduler** object of the Workflow. For more on this, refer to [this section](#).

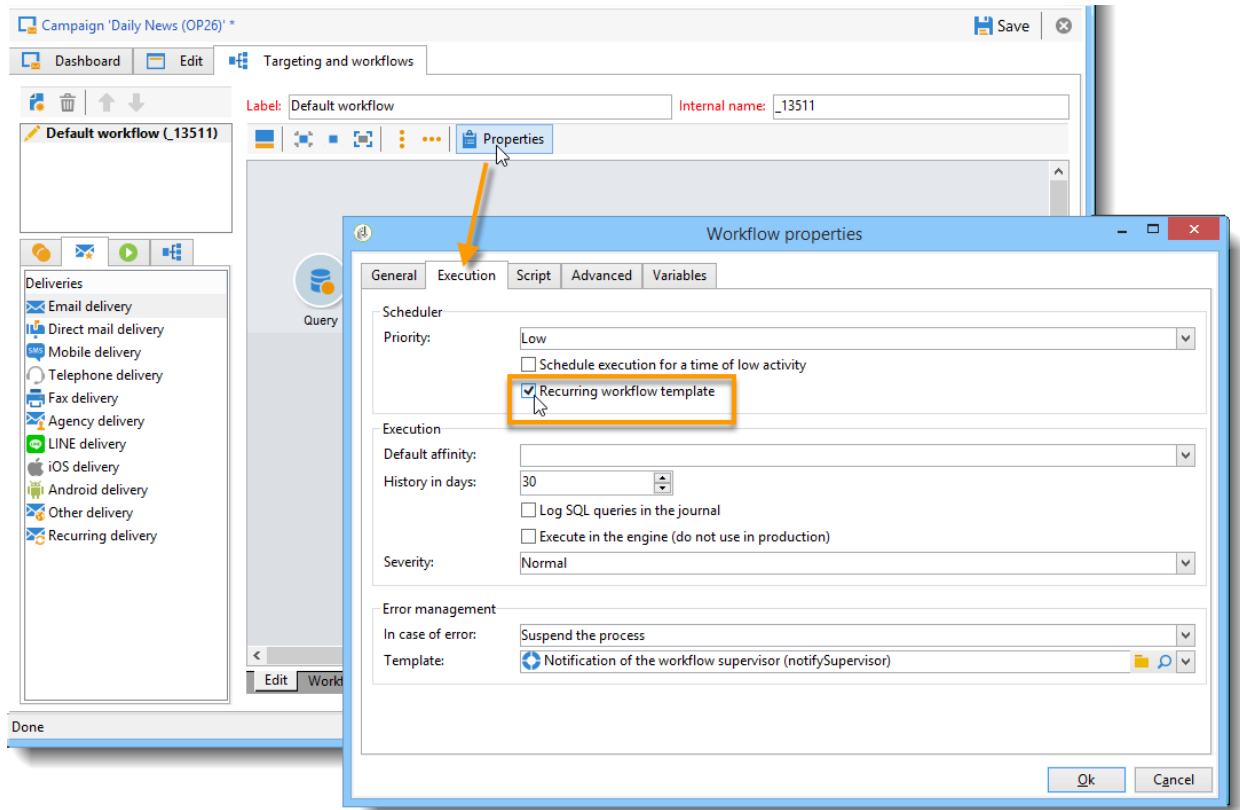
IMPORTANT

Execution schedule configuration must be performed carefully to avoid overloading the database. Recurring campaigns duplicate the workflow(s) of their template depending on the specified schedule. The implementation of excessively frequent workflow creation can hinder the operation of the database.

1. Specify a value in the **Create in advance for** field in order to create the corresponding workflows for the period indicated.
2. Create the workflow template to be used in campaigns based on this template, with the targeting parameters and one or more generic deliveries.

NOTE

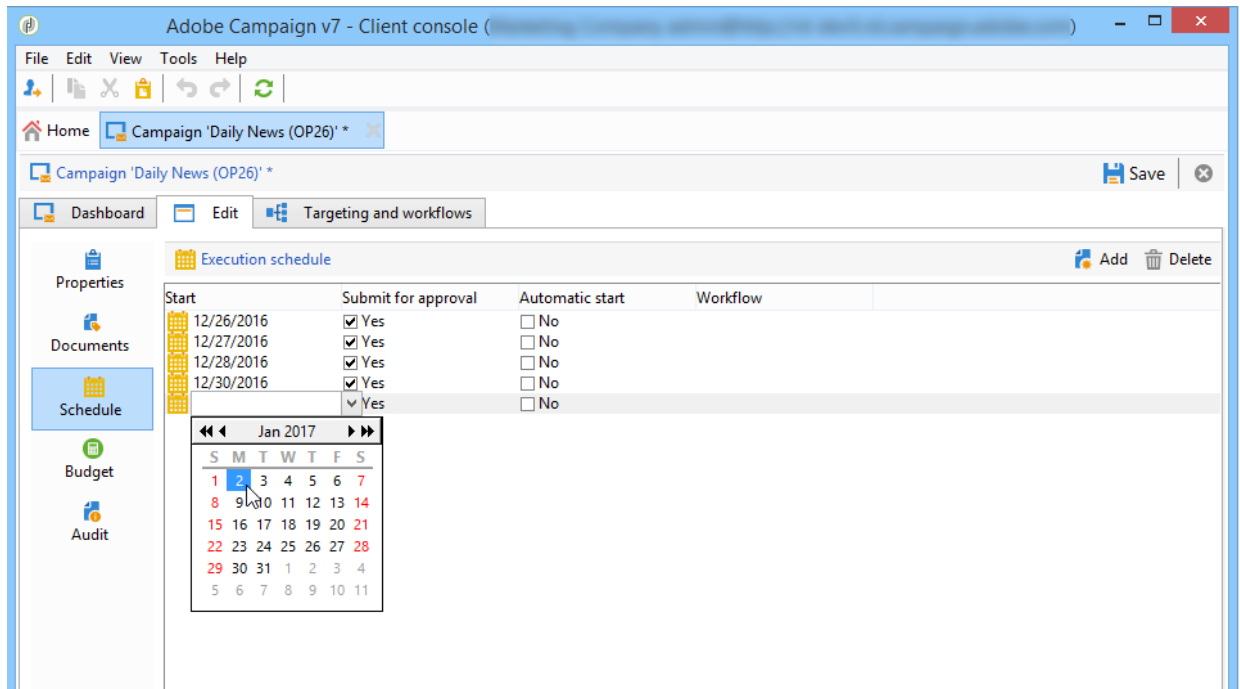
This workflow must be saved as a recurring workflow template. To do this, edit the workflow properties and select the **Recurring workflow template** option in the **Execution** tab.



Create the recurring campaign

To create the recurring campaign and execute its workflows according to the schedule defined in the template, apply the following procedure:

1. Create a new campaign based on a recurring campaign template.
2. Fill in the workflow execution schedule.



- The campaign schedule lets you enter an automatic workflow creation or execution start date for each line.

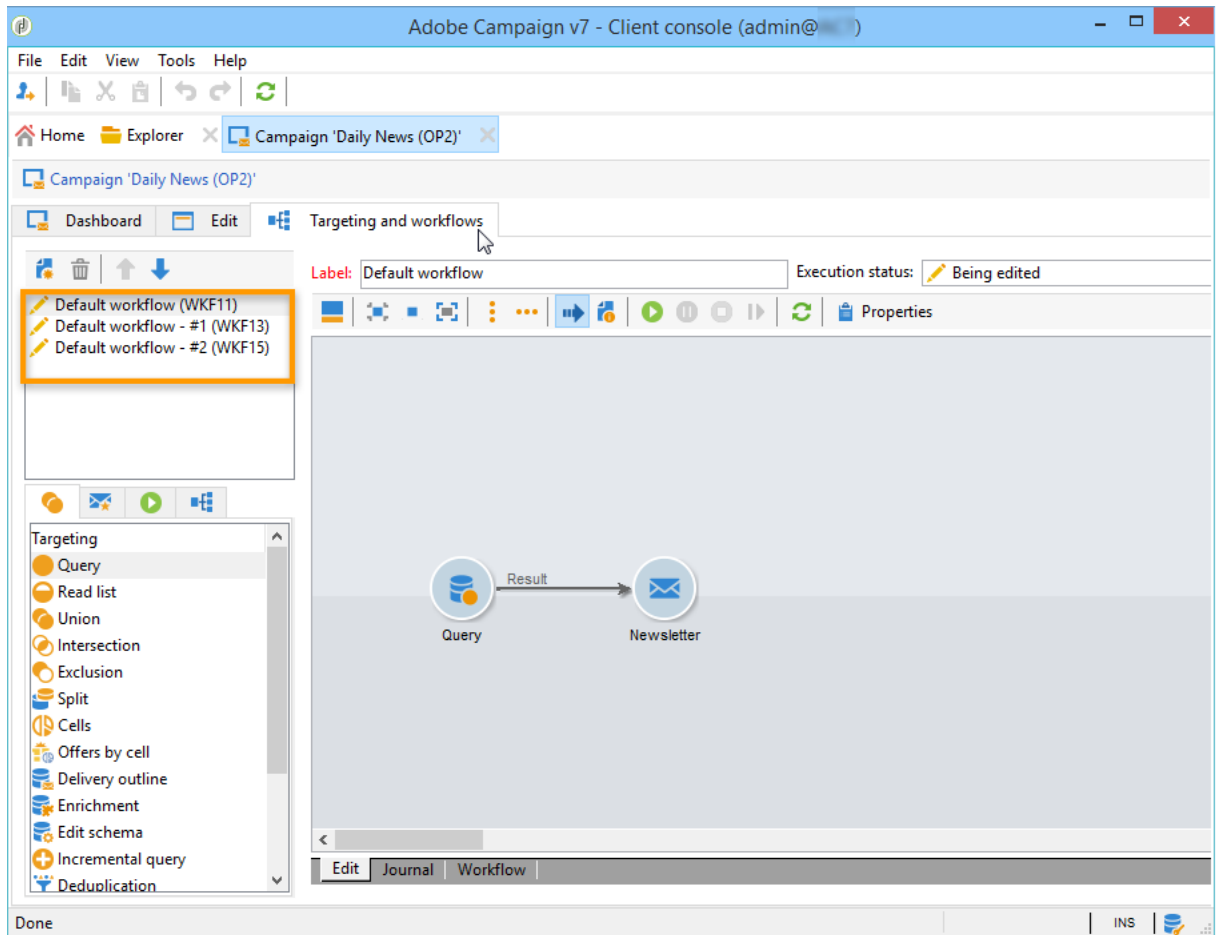
For each line, you can add the following additional options:

- **To be approved** : lets you force the delivery approval requests in the workflow.
- **To be started** : lets you start the workflow when the start date has been reached.

The **Create in advance for** field lets you create all the workflows covering the period entered.

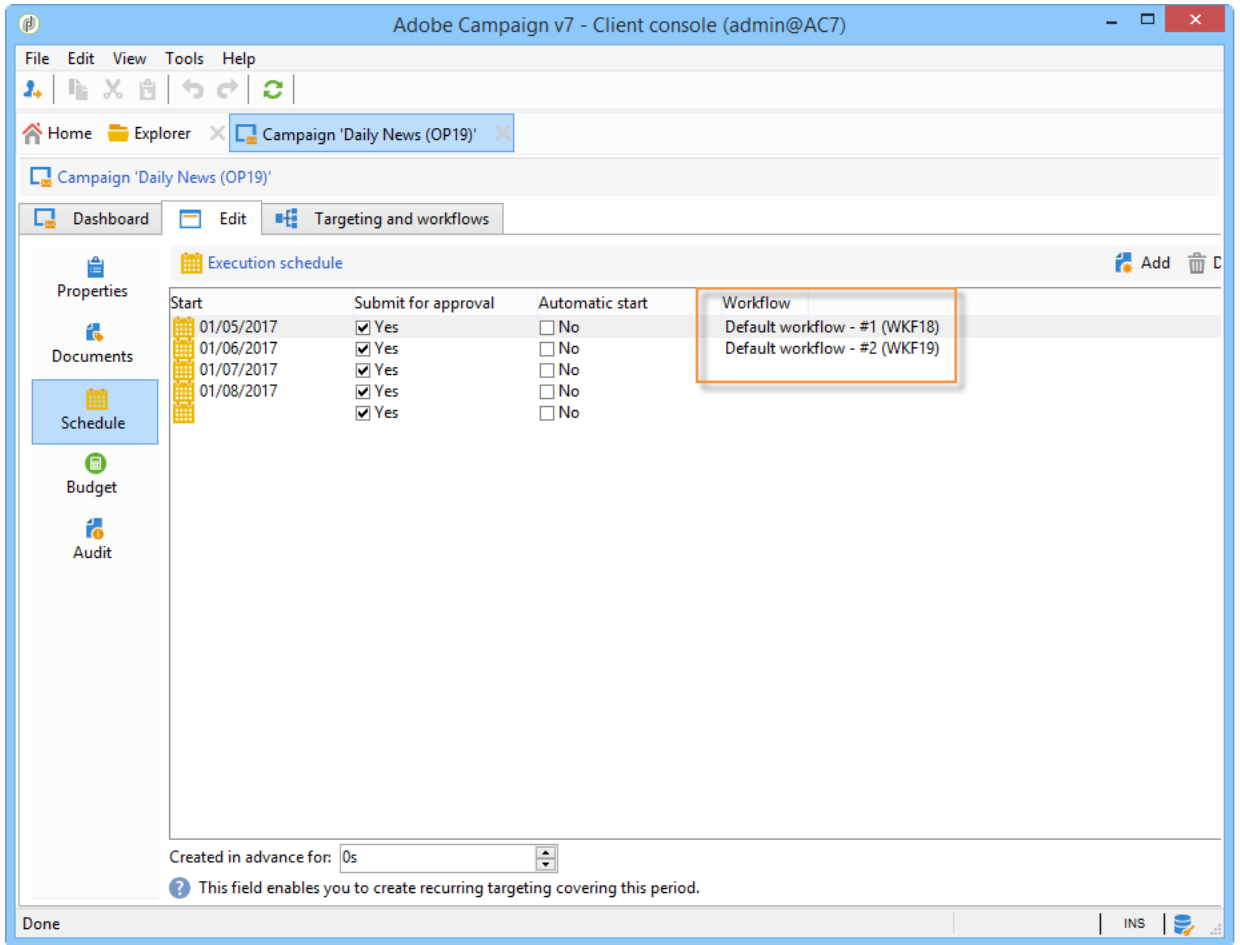
Upon execution of the **Jobs on campaigns** workflow, the dedicated workflows are created based on the occurrences defined in the campaign schedule. A workflow is thus created for each execution date.

- Recurring workflows are created automatically from the workflow template present in the campaign. They are visible from the **Targeting and workflows** tab of the campaign.

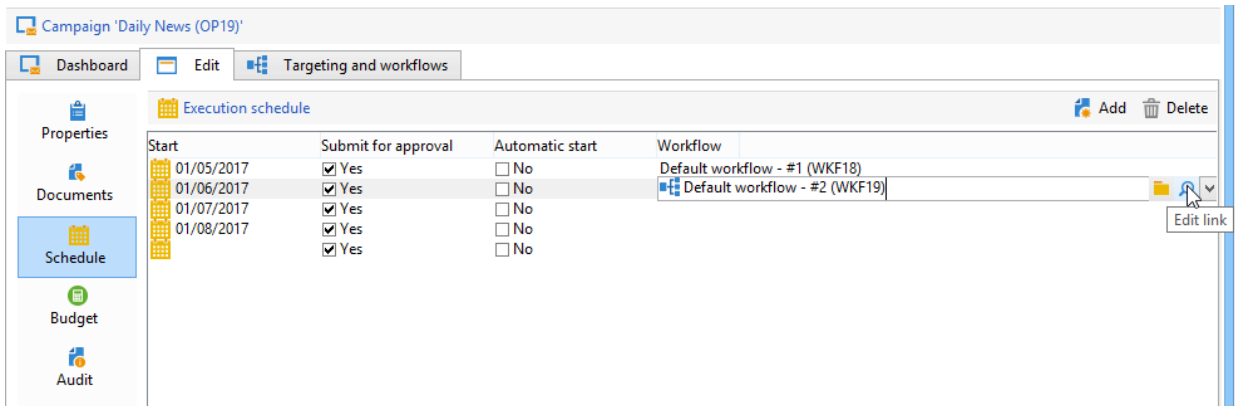


The label of a recurring workflow instance consists of its template label and the workflow number, with the # character in between.

Workflows created from the schedule are automatically associated with it in the **Workflow** column of the **Schedule** tab.



Each workflow can be edited from this tab.



NOTE

The start date of the schedule line associated with the workflow is available from a variable of the workflow with the following syntax:

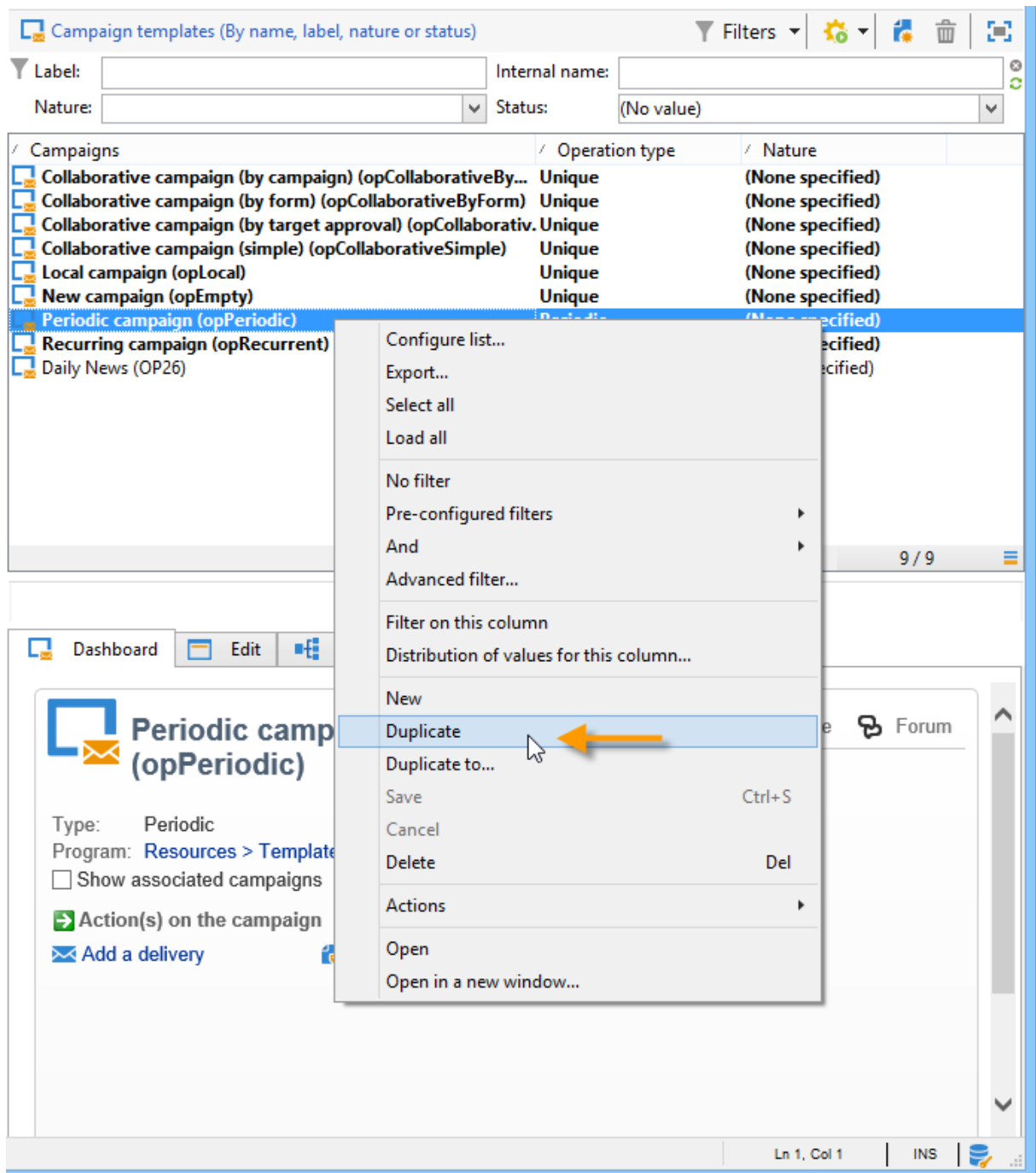
```
$date(instance/vars/@startPlanningDate)
```

Create a periodic campaign

A periodic campaign is a campaign based on a specific template that lets you create campaign instances based on an execution schedule. Campaign instances are created automatically based on a periodic campaign template, depending on the frequency defined in the template schedule.

Create the campaign template

1. Create a **Periodic** campaign template, preferably by duplicating an existing campaign template.

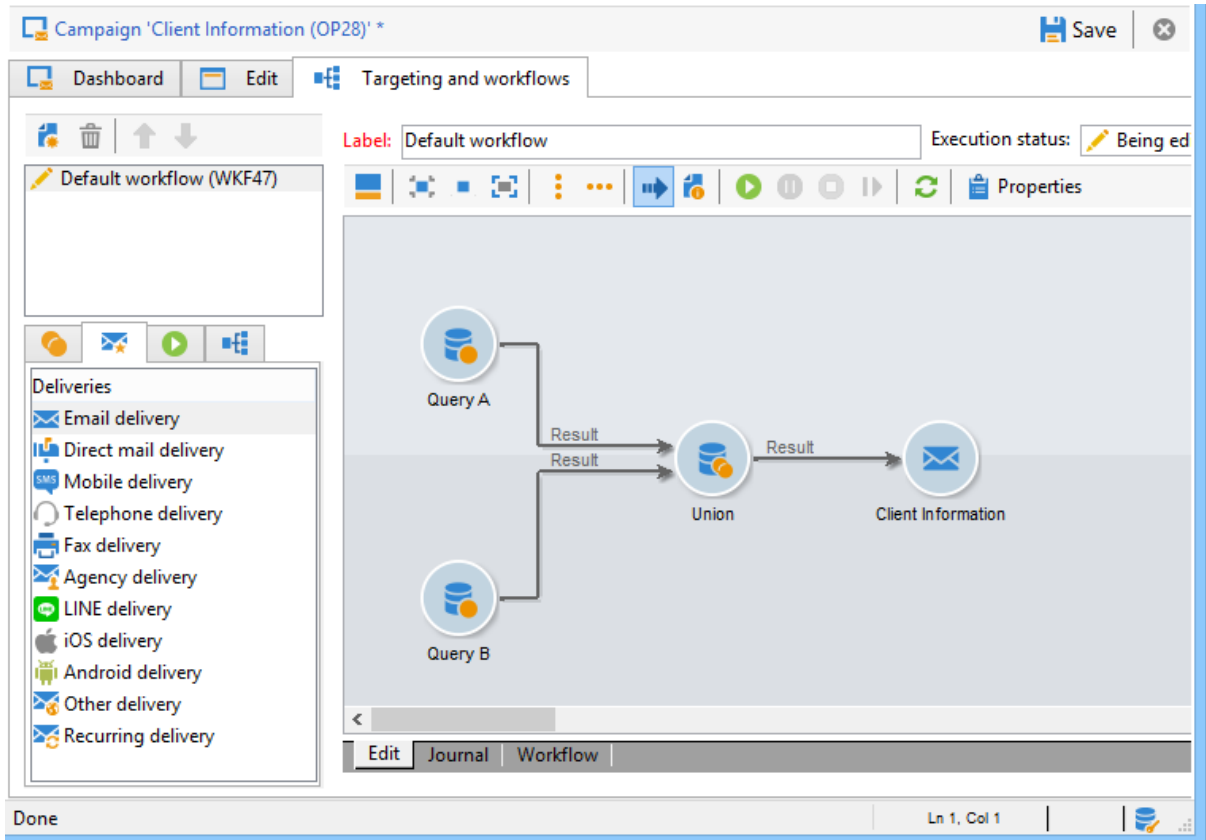


2. Enter the properties of the template.

NOTE

The operator whom the template is assigned to needs to have the appropriate rights to create campaigns in the selected program.

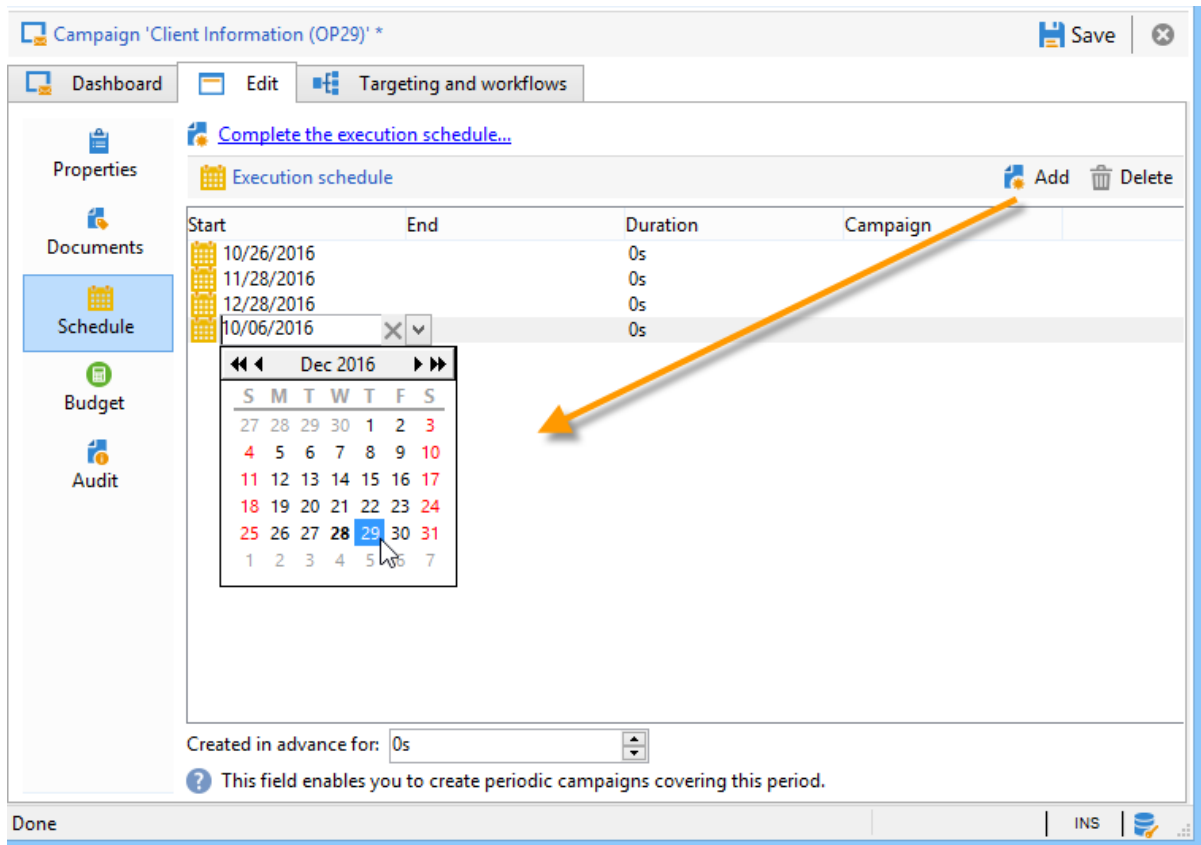
3. Create the workflow associated with this template. It will be duplicated in every periodic campaign created by the template.



NOTE

This workflow is a workflow template. It cannot be executed from the campaign template.

4. Complete its execution schedule as for a recurring campaign template: click the **Add** button and define the start and end dates, or fill in the execution schedule via the link.

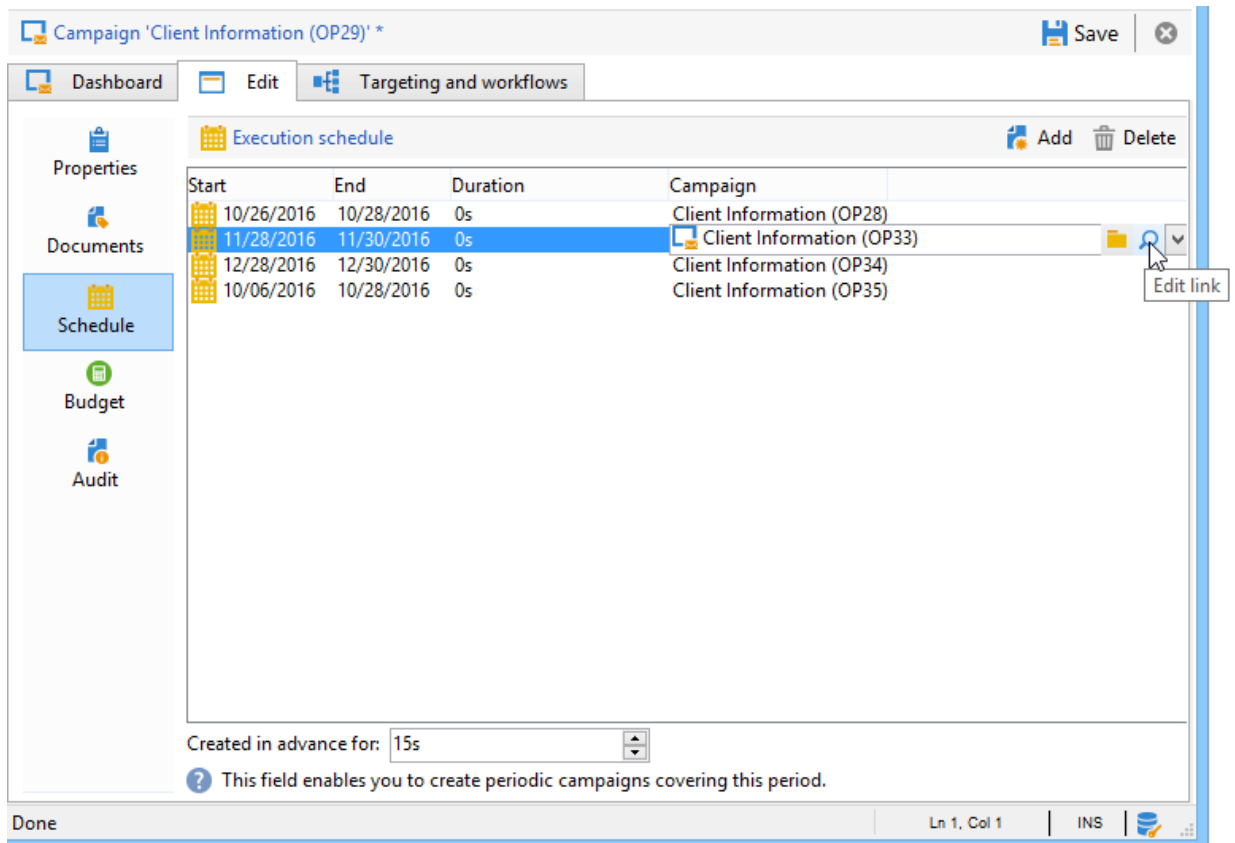


IMPORTANT

Periodic campaign templates create new campaigns according to the schedule defined above. It must therefore be completed carefully, to avoid overloading the Adobe Campaign database.

5. Once the execution start date is reached, the matching campaign is created automatically. It takes on all the characteristics of its template.

Each campaign can be edited via the template schedule.



Each periodic campaign contains the same elements. Once created, it is managed as a standard campaign.

Tutorial video

This video shows how to create a marketing plan, programs, and campaigns.

<https://experienceleague.adobe.com/docs/campaign-classic/using/orchestrating-campaigns/orchestrate-campaigns/setting-up-marketing-campaigns.html?lang=en#video>

Additional Campaign how-to videos are available [here](#).

3.6 Work with Sources and Destinations

About Sources and Destinations

With Adobe Experience Platform, you can share data between Campaign Classic and Adobe Real-time Customer Data Platform (RTCDP). This allows you to target Adobe Experience Platform audiences in your Campaign workflows, then send back to Adobe Real-time Customer Data Platform data related to these audiences like sends, opens, and clicks.

- With **Destinations**, ingest audiences from Adobe Experience Platform into Campaign Classic. This allows you to activate your known and unknown data for your marketing campaigns.
- With **Sources**, export Campaign Classic data (e.g. sends, opens, clicks) into Adobe Experience Platform. This allows you to centralize data you collect from disparate sources into one single place, and use the insights gained from it to do more.

IMPORTANT

Please keep in mind the SFTP storage limits, database storage limits, and active profile limits as per your Adobe Campaign contract while performing this integration.

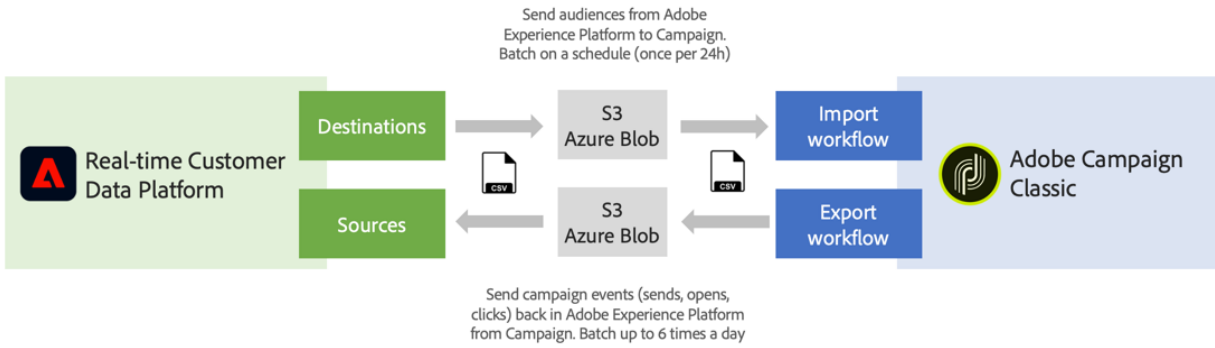
For a more detailed overview of Adobe Real-time Customer Data Platform, Destinations and Sources, refer to these pages:

- [Adobe Real-time Customer Data Platform](#)
- [Destinations documentation](#)
- [Sources documentation](#)

Connect Campaign Classic with Adobe Experience Platform

To be able to share data between Adobe Experience Platform and Campaign Classic, you first need to connect Adobe Campaign as a **Destination**, and connect your AWS S3 or Azure blob storage location as a **Source** in Adobe experience Platform.

Once the connectors have been configured, you can set up a data import or export into Campaign Classic using workflows.



For more details on how to setup these import and export processes, refer to these sections:

- [Ingest Adobe Experience Platform segments into Campaign](#)
- [Export data from Campaign to Adobe Experience Platform](#)