



# EXPERIENCE LEAGUE

## LEARNING LABS

L759 – Getting the most out of Adobe  
Campaign Standard

## Table of Contents

<b>EXPERIENCE LEAGUE .....</b>	<b>3</b>
INTELLIGENT GUIDANCE.....	3
COMMUNITY .....	3
CONNECT WITH EXPERTS.....	3
JOIN NOW.....	3
<b>EXPERIENCE LEAGUE LEARNING LABS.....</b>	<b>4</b>
OVERVIEW .....	4
ENVIRONMENT.....	4
TOOLS.....	4
<i>Go URL</i> .....	4
<i>Q&amp;A</i> .....	4
<i>Continue the Conversation</i> .....	4
<i>Community</i> .....	4
<b>LAB OVERVIEW.....</b>	<b>6</b>
KEY TAKEAWAYS .....	6
PREREQUISITES.....	6
BUSINESS USE CASE.....	7
<b>LESSON 1 - LOGIN TO ACS, LAUNCH WORKFLOW ACTIVITIES .....</b>	<b>8</b>
OBJECTIVE.....	8
EXERCISE 1.1.....	8
<b>LESSON 2 – IDENTIFY RECIPIENTS WHO OPENED AT LEAST 1 EMAIL IN THE LAST YEAR.....</b>	<b>11</b>
OBJECTIVE.....	11
LESSON CONTEXT .....	11
EXERCISE 2.1.....	11
<b>LESSON 3 – UPLOAD AN EXTERNAL CSV FILE WITH ZIP CODES INFORMATION .....</b>	<b>19</b>
OBJECTIVE.....	19
EXERCISE 3.1.....	19
<b>LESSON 4 – RECONCILE ZIP CODE AND CITY DATA USING ENRICHMENT ACTIVITY .....</b>	<b>23</b>
OBJECTIVE.....	23
EXERCISE 4.1.....	23
<b>LESSON 5 – SEGMENT THE TARGETED POPULATION IN 2 PART: RECIPIENTS WHO MATCH THE CITY LOADED AND ALL THE OTHERS.....</b>	<b>30</b>
OBJECTIVE.....	30
EXERCISE 5.1.....	30
<b>LESSON 6 – CREATE A DYNAMICALLY POPULATED EMAIL.....</b>	<b>36</b>
OBJECTIVE.....	36
EXERCISE.....	36
<b>LESSON 7 – BUILD CUSTOM REPORTS TO ANALYZE CITY ENGAGEMENT DATA.....</b>	<b>50</b>

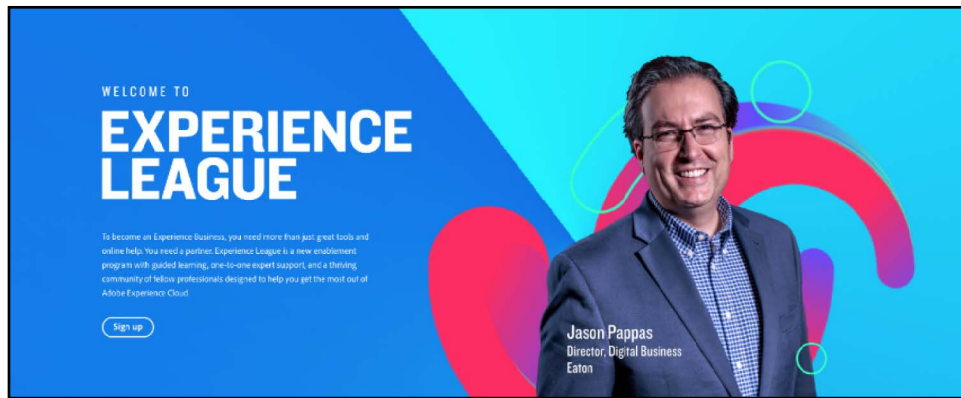
# EXPERIENCE LEAGUE



OBJECTIVE.....	50
LESSON CONTEXT .....	50
EXERCISE.....	50
<b>APPENDIX – CHALLENGE YOURSELF BY HYPER-AUTOMATING YOUR CAMPAIGNS.....</b>	<b>58</b>
OBJECTIVE.....	58
LESSON CONTEXT .....	58
EXERCISE.....	58
<b>ADDITIONAL RESOURCES .....</b>	<b>62</b>

## Experience League

Experience Makers are made with Experience League. Kickstart your Customer Experience Management abilities with personalized learning to develop your skills, engage with a global community of your peers and earn career advancing recognition.



## Intelligent Guidance

The Intelligent Guidance site is full of **recommended step-by-step learning and events** that are based on the preferences selected in your profile

## Community

Get and stay connected, meet other experts like yourself, and **get answers in minutes** from our global community of practitioners. No more waiting for support tickets. Now you can **share your ideas with us** and instantly **vote with your peers on future product enhancements**. Connect to a community of 150,000+ peers to get you answers in minutes.

## Connect with Experts

When you need more support, Experience League connects you with Adobe experts ready to work with you in a 1:1 setting.

## Join Now

Join the League today at [experienceleague.adobe.com](https://experienceleague.adobe.com)

## Experience League Learning Labs

### Overview

Experience League Learning Labs at Summit are guided learning sessions that connect you with Adobe experts and your peers. It's another way Experience League is helping you kickstart your Adobe know-how to get the most out of Adobe Experience Cloud. Sign up for Experience League at [experienceleague.adobe.com](https://experienceleague.adobe.com)

### Environment

Fast-track your Adobe expertise with 90-minute guided learning sessions. We empower you with preloaded software on each computer, and walk you through the lab with step-by-step guidance.

### Tools

#### Go URL

In the footer of this lab manual you'll find an **Adobe "go" URL** that will redirect you to a **dedicated thread** on our Experience League community where you'll find **all the resources & links for this lab**. In addition, we'll continue to monitor these threads for Q&A, discussion, and guidance to continue your learning.

#### Q&A

Each lab has reserved time for question and answer. However, if you aren't able to get your question answered during the lab or you'd prefer a written response, please use the GO URL in the footer to post your question on the community thread for this lab. Adobe has experts monitoring these threads prepared to answer your questions and ensure your success in mastering the content contained within this lab.

#### Continue the Conversation

Don't let this lab coming to an end be the end of our conversation. We've created a dedicated space to collaborate with you and your peers around this lab's content. Join us as you implement these concepts into your business and share your success and trails.

#### Community

In addition to Adobe experts from Customer Care, Product, Engineering, and other groups, we have over 150,000 of your peers on our communities.

#### General Questions

Search through our ever-growing goldmine of questions or ask your own and get answers in minutes.



## Ideas

Have a great idea that you'd like to see Adobe implement? Come share or vote on ideas in our Experience League communities to influence product roadmap.

## Feedback

Our product team often seeks your feedback by posting polls on our community. Ensure your voice is heard by participating.

---

*All links available at [adobe.com/go/summit2019-l759](https://adobe.com/go/summit2019-l759)*

---

## Lab Overview

This session is intended for Adobe Campaign Standard (“ACS”) users with experience of using ACS. The content of the lab builds off the basic knowledge of functionality such as query activity, reporting and explores complex functions and concepts of the tool such as enrichment activities, tracking logs, splits and custom dynamic reports.

## Key Takeaways

After end of this session, you will know how to:

1. Perform efficient query activity and use the tracking logs to select users who have engaged with your brand
2. Load external data using a load file activity
3. Reconcile external data with recipient information and create new data flags based on logic
4. Send an email delivery with dynamically populated images
5. Create custom dynamic reports to obtain business insights
6. Utilize incremental query activity to hyper-automate the workflow and trigger it automatically

---

*We will provide materials but will not cover in the lab session*

---

## Prerequisites

You need access to

- Adobe Campaign Standard

NOTE: At your workstation you should have a paper with your participant number, e.g. “01”. This number gets used for many purposes during the lab (e.g., for login credentials, instance URL, etc.).

---

*Wherever you see “XX” in this lab manual, username, credentials, replace it with your participant number.*

*Demo Instance URL of Adobe Campaign Standard will be displayed on the presentation deck during the session.*

---

## Business Use Case

An admissions team of We.Edu university is planning “We.Edu on the road” events in Boston, MA, Austin, TX and San Francisco, CA. The team would like to reach out to prospective applicants who plan to apply for a degree within the upcoming year, who live within 50 miles radius of the event location city (Boston, Austin, San Francisco). The team would like to send 1 email for event invitation, and another email to decide where to host the last event.



## Lesson 1 - Login to ACS, launch workflow activities

### Objective

In this lesson you will learn how to log in to Adobe Campaign Standard and launch workflow activities. Workflows are an easy way to automate steps for marketing activities such as – As a Marketer, I want to target a certain group of my customers every week and send them a retargeting email. With the use of workflows, we can automate these tasks and let Adobe Campaign perform these tasks step by step in automated fashion.

### Exercise 1.1

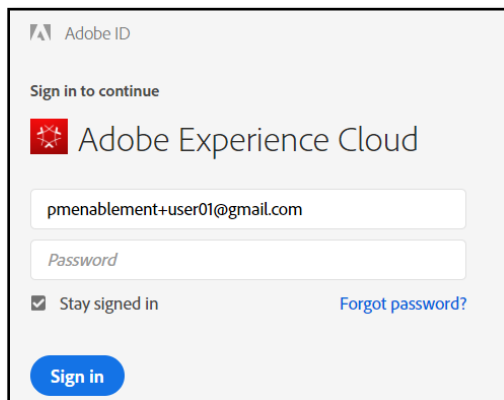
1. Type in the Campaign URL displayed on the presentation Deck and login to ACS

User id: pmenablement+user<XX>@gmail.com

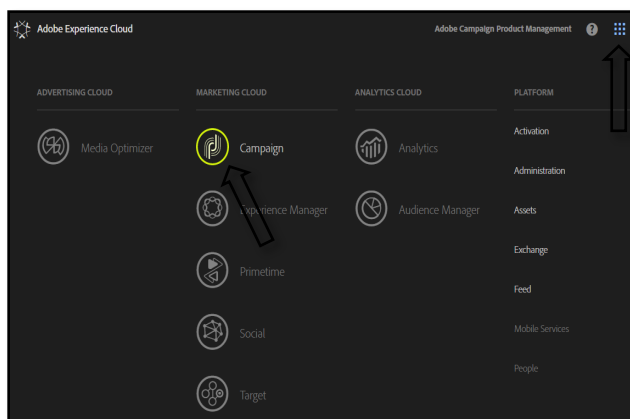
For example pmenablement12@gmail.com

Password: Pmenablement+user<XX>

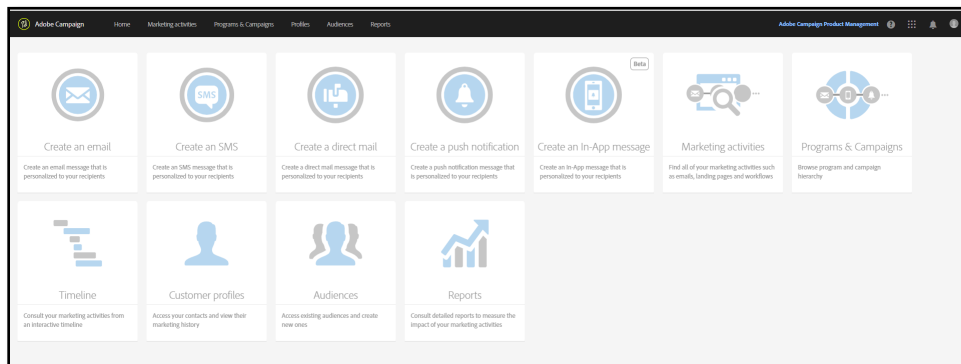
With capital “P”, password is case-sensitive



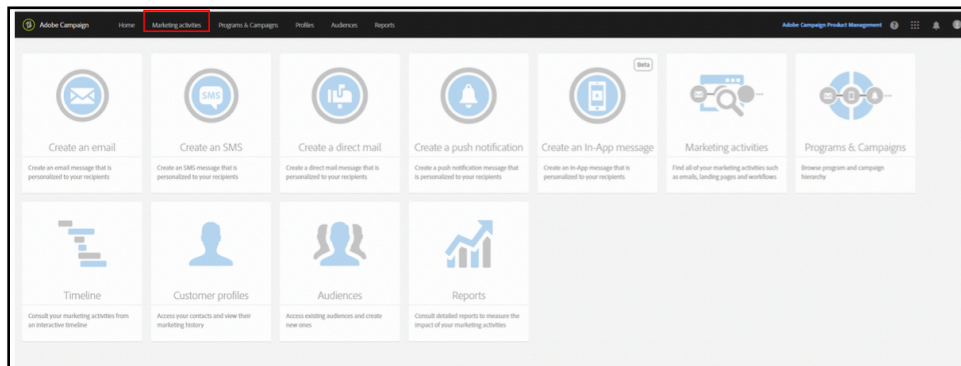
2. Click on the grid icon, then on the Campaign icon



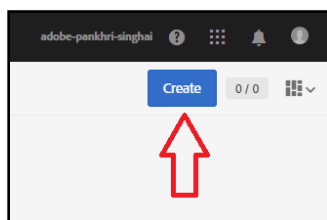
- Once you click on Campaign you will land on a page which looks like following. Here are the main marketing activities you can create, like email or mobile push deliveries. But for this lab we will go directly to creating workflows.



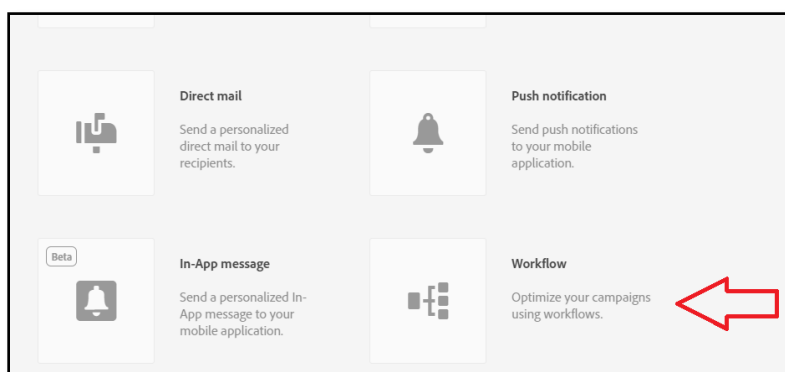
- Click on **Marketing Activities** on the top bar of the screen



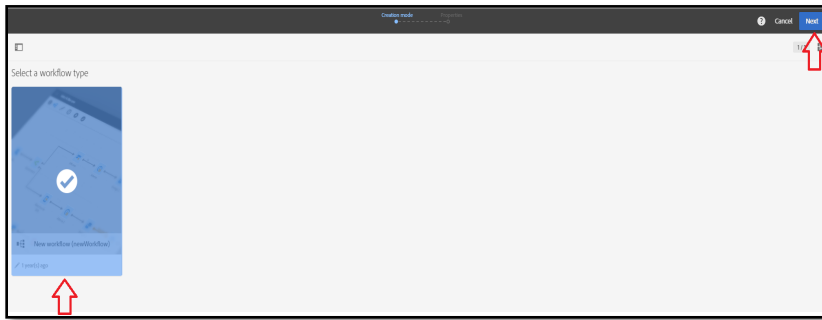
- Click on **Create** to create a workflow



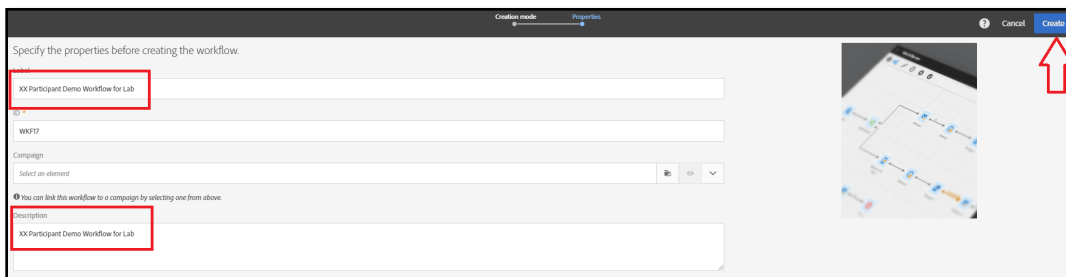
- Select **workflow**



7. Choose a workflow type, click **Next**



8. Add workflow **Properties** – Be careful to replace your participant ID (instead of XX) in Label, Click on Create. You can enter a name in the **Label** field and modify the ID. The activity name and its ID appear in the interface, but these are not visible by the message recipients.

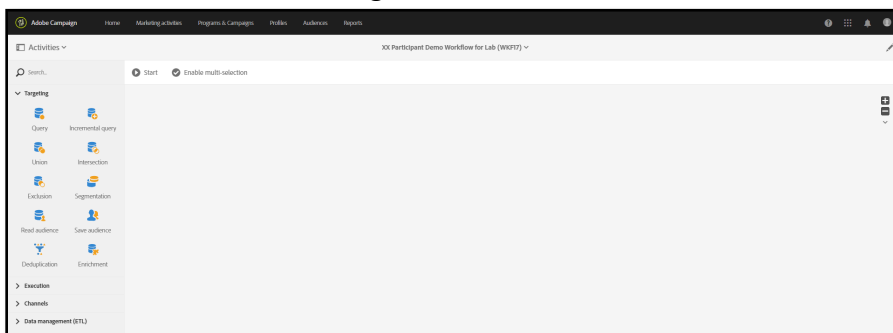


---

*You can create your workflow within a parent campaign from the list of marketing activities. You can link this workflow to a campaign by selecting one that has already been created.*

---

9. You will land on the following screen. We will focus on this Canvas in next few lessons.



In case you click back or move away from this screen for some reason, you can go to workflows, following steps 1 to 7 above and will be able to see your workflow there. Find your workflow by your participant ID.

## Lesson 2 – Identify recipients who opened at least 1 email in the last year

### Objective

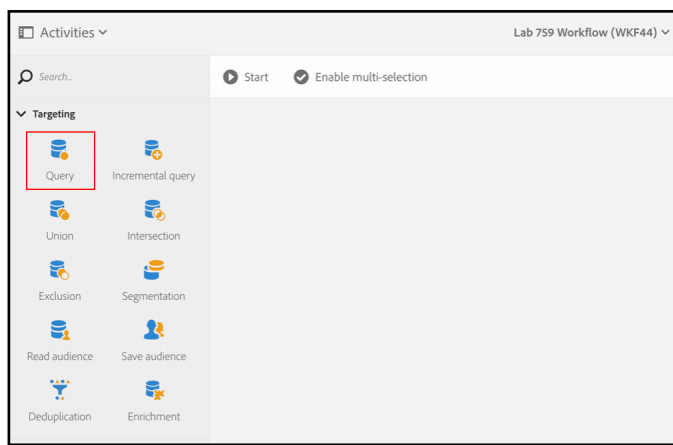
Often as a marketer you must assume about user’s behavior based on their interaction with your brand. In our case, we will assume that if a subscriber opened at least one email in the last year, then they are interested in applying for our programs this coming year. You can also choose opened more than 2, 3 or any number of emails.

### Lesson Context

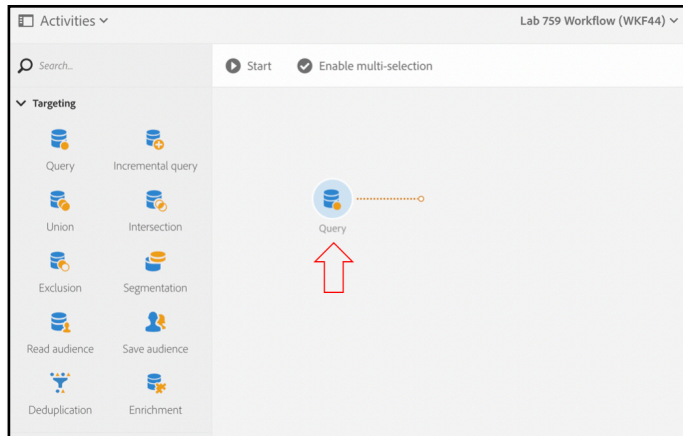
In this lesson you will learn how to select recipients from the database based on their previous history of interaction with your brand (opens and clicks) over the period that you specify. There are many applications to this functionality, however our business case today is – we want to select all recipients in the database who have opened at least 1 email from us in the last 1 year.

### Exercise 2.1

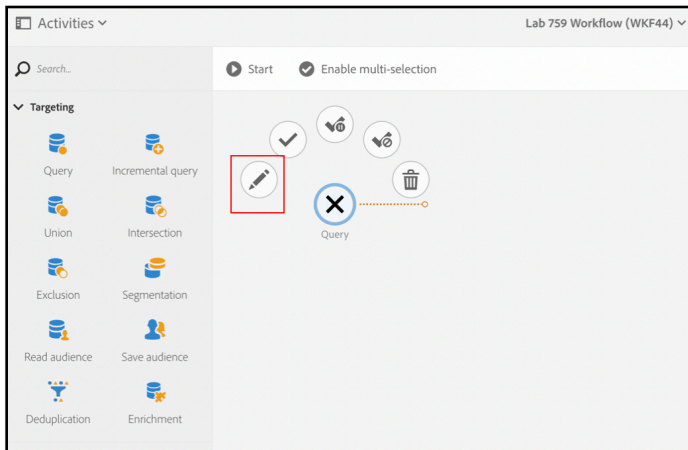
1. Drag and drop Query activity in the panel of activities on the workflow canvas, under **Targeting** section



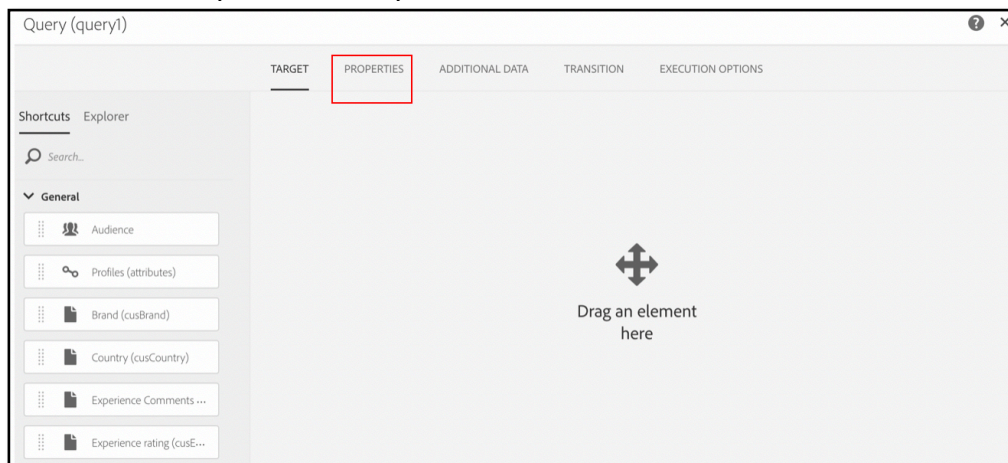
2. Click on the **Query** activity



3. Select **Edit** sign to specify desired parameters after dragging the query activity to canvas



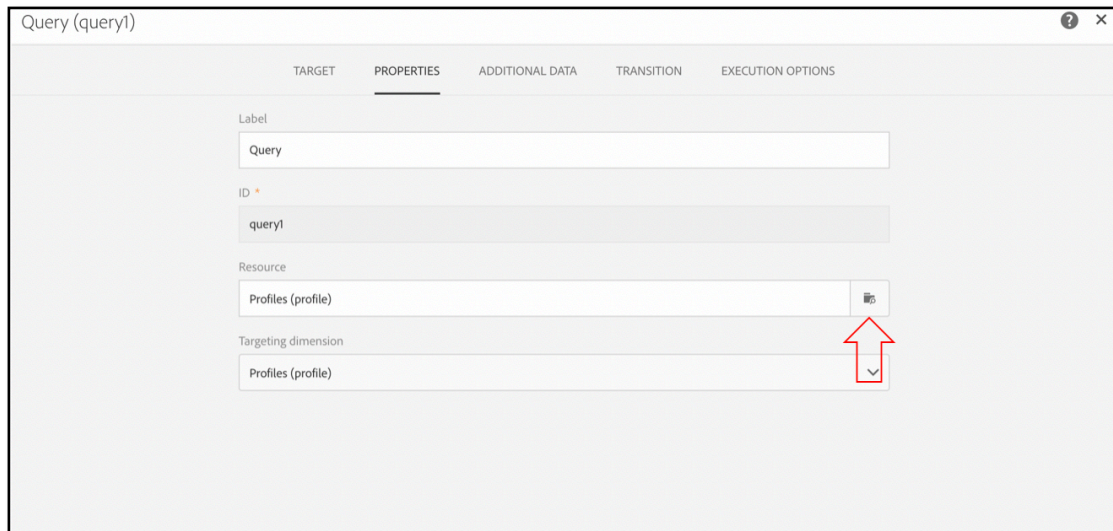
4. In the **Query** wizard navigate to **Properties** to select recipients who interacted with your brand in the last year efficiently



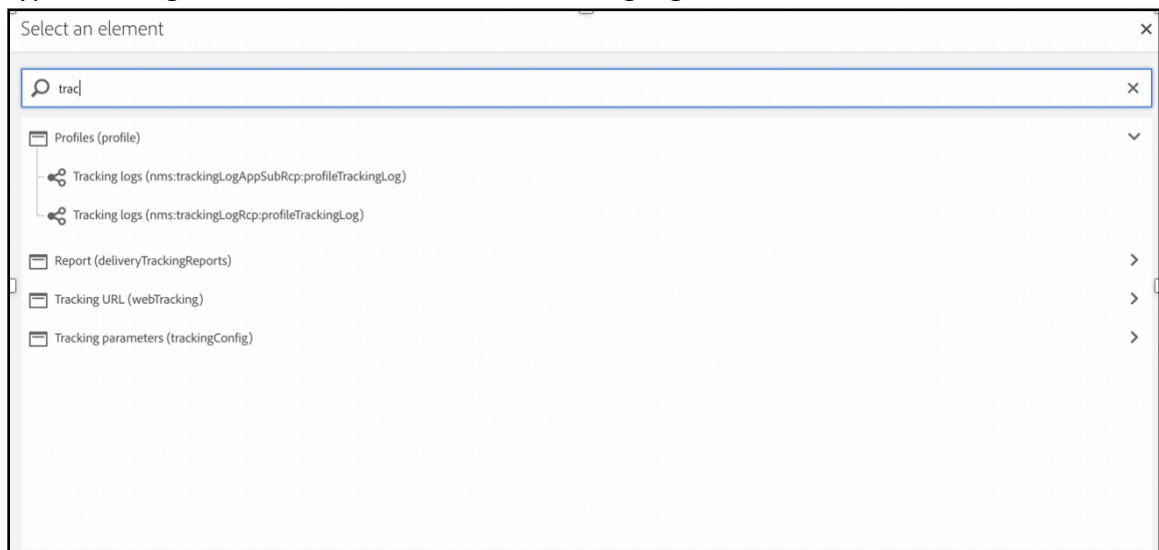
5. Switch the resource you would like to query from the default **Profile** to **Tracking logs**. By default, the query activity is set to query **Profile** resource. This means you can select profiles based on profile attributes. However, running queries in such a manner is

inefficient, because in order to perform the query, Campaign first selects all profiles and then narrows down the query results based on specified parameters. Hence, if you have a large profile set, consider switching query resource.

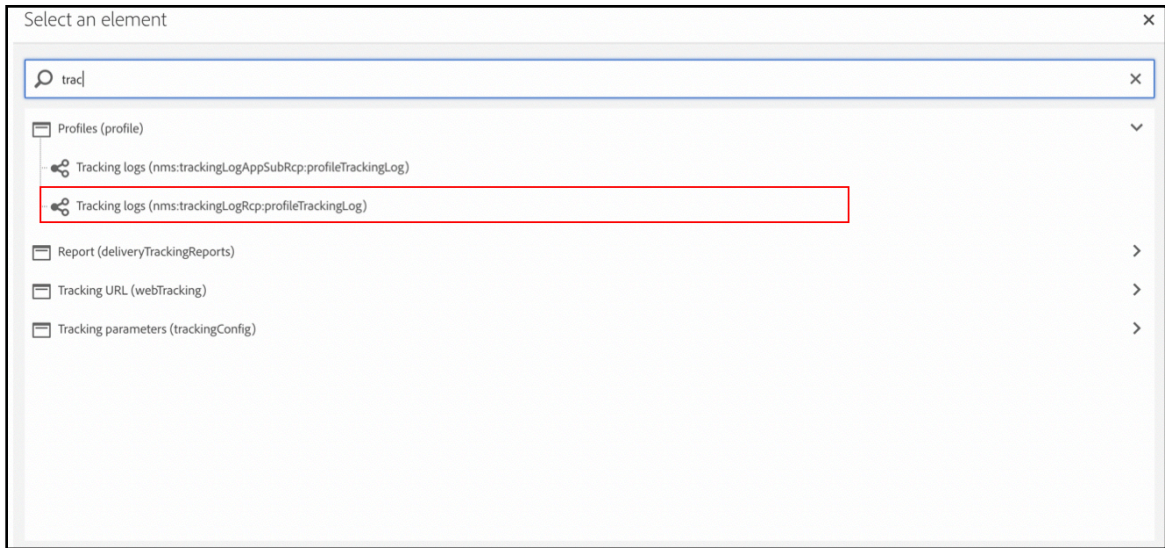
When you select to query **Tracking logs**, Campaign will only pick recipients who have at least one tracking log (meaning they opened at least one email from your brand).



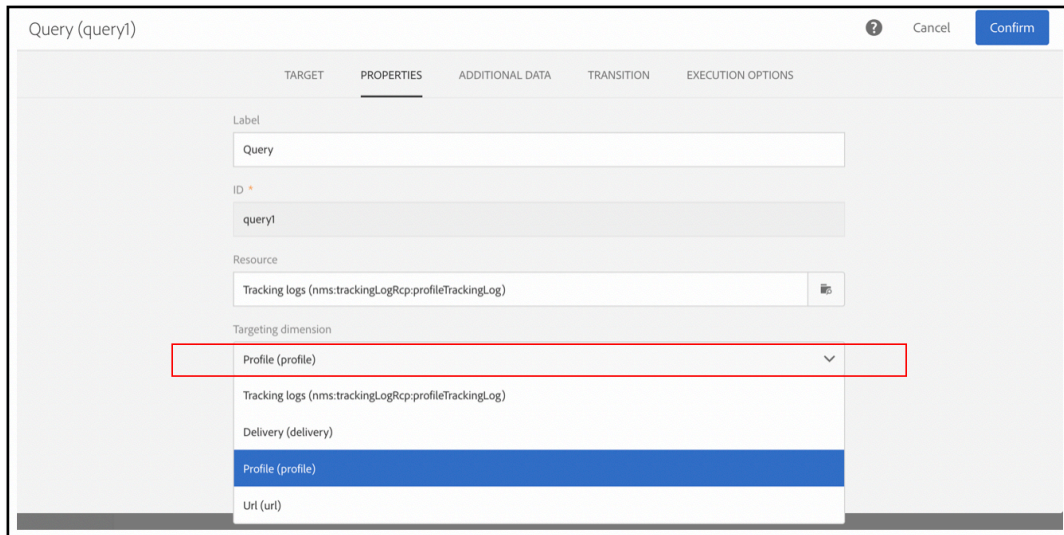
## 6. Type *Tracking* into a search bar to select tracking logs.



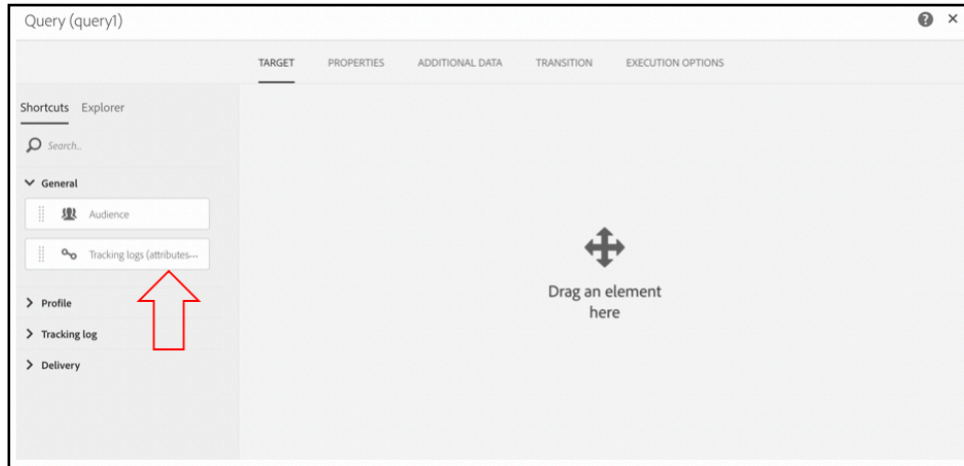
7. Select the **Tracking logs** corresponding to email channel, return back to **Properties** page



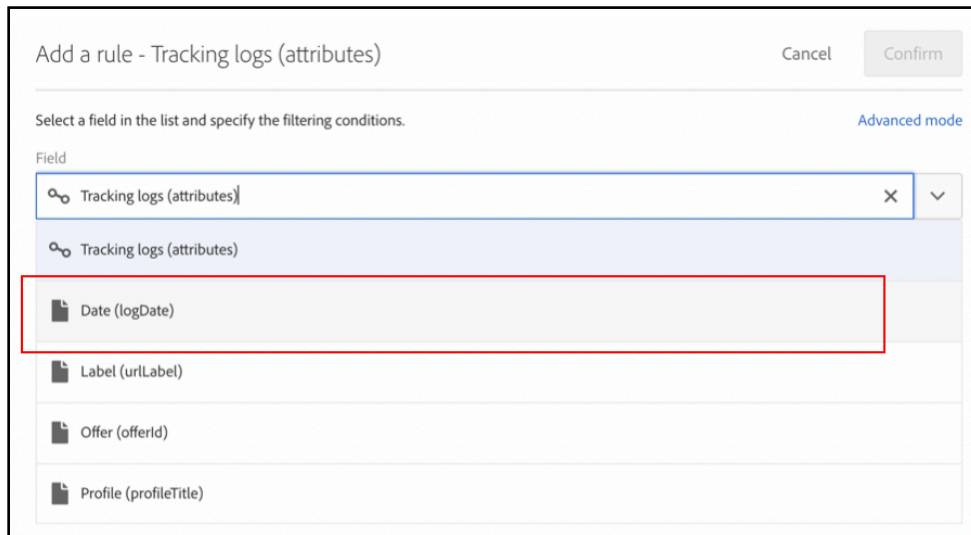
8. Adjust the targeting dimension to **Profile** on the **Properties** page  
Adjusting the targeting dimension to **Profile** in this stage ensures that the query returns profiles connected to the resource you queried. In our case, while we queried the **Tracking logs**, we want the resulting query to return the **Profiles** and associated information. You can set the targeting dimension to tracking logs, if you want the query to return a set of tracking logs, which you want to export afterwards, for example.



- Navigate back to the **Target** tab, then drag and drop **Tracking logs** attributes into the Workflow canvas.  
Now you can select the time range during which you want to pull the tracking logs for (in other words you will determine over what time you need to see the conversation history with the recipient). In this step you can also add additional conditions to further narrow down your recipient list.



- From the list of attributes select **Date (logDate)** to narrow down the logs to specific timeframe



- For the purposes of this exercise we will choose **Range**, and specify **Start date** and **End date** as **March 26, 2018** and **March 26, 2019**  
You can experiment with **Absolute** or **Relative** depending on what you are trying to accomplish. **Relative** is a good option for recurring workflows, as you do not need to reset the date, it will always be relative to some date you specify.



Add a rule - Tracking logs (attributes) Cancel Confirm

Select a field in the list and specify the filtering conditions. [Advanced mode](#)

Field  
Date (logDate) ▼

Filter conditions

Filter type	Level of precision
<span>Range</span> <span>▼</span>	<span>Day</span> <span>▼</span>
<span>Absolute</span>	Included <input checked="" type="checkbox"/>
<span>Range</span>	Included <input checked="" type="checkbox"/>
<span>Relative</span>	
<span>Select a date</span> <input type="checkbox"/>	

Rule name

ⓘ You can enter a name for this rule: it will replace the default label.

Edit a rule - Tracking logs (attributes) Cancel Confirm

Select a field in the list and specify the filtering conditions. [Advanced mode](#)

Field  
Date ▼

Filter conditions

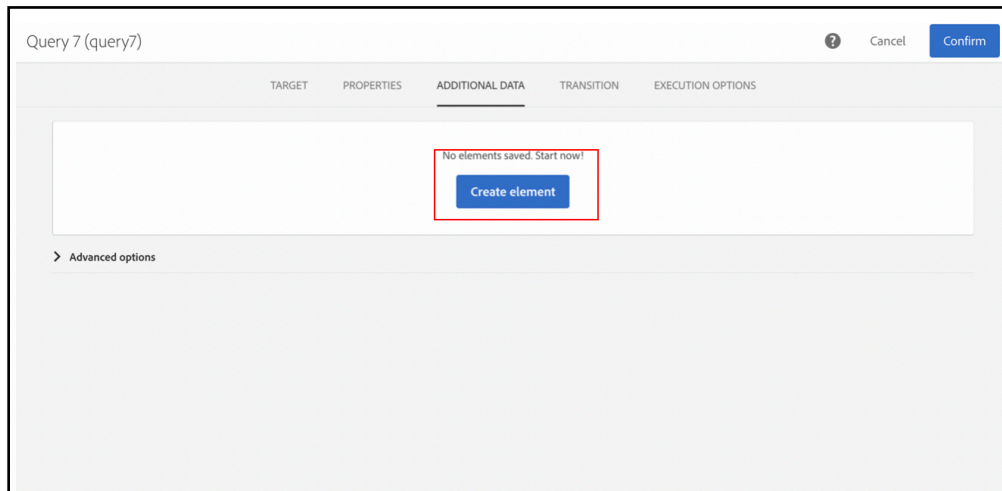
Filter type	Level of precision
<span>Range</span> <span>▼</span>	<span>Day</span> <span>▼</span>
Start date	Included <input checked="" type="checkbox"/>
<span>03/26/2018</span> <input type="text"/>	
End date	Included <input checked="" type="checkbox"/>
<span>03/27/2019</span> <input type="text"/>	

Rule name

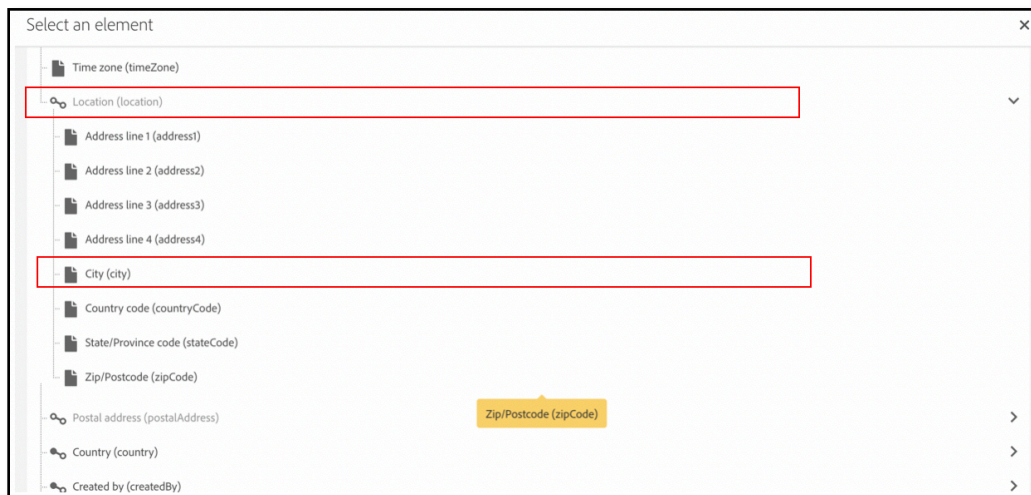
ⓘ You can enter a name for this rule: it will replace the default label.

12. **Confirm** the selection, navigate to **Additional Data** tab click on **Create Element**

In this step we will select additional data fields that we will later use to reconcile the data from the query with another dataset.

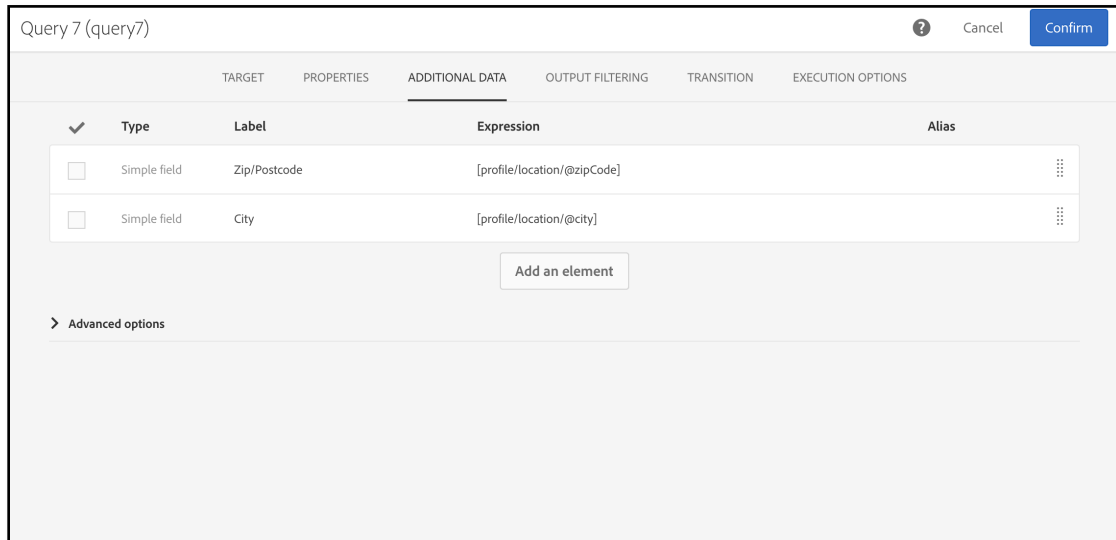


13. In the **New additional data** screen, select **Expression** and navigate to **Profile** first, then **Location** and then **City**  
Then click **Confirm**



14. Click on Create an Element, then in the **New additional data** screen, select **Expression** and navigate to **Profile** first, then **Location** and then **Zip/Postcode**
15. Then click **Confirm**

Result should look like this:



The screenshot shows a configuration window for 'Query 7 (query7)'. At the top right, there are buttons for '?', 'Cancel', and 'Confirm'. Below the title bar are tabs for 'TARGET', 'PROPERTIES', 'ADDITIONAL DATA', 'OUTPUT FILTERING', 'TRANSITION', and 'EXECUTION OPTIONS'. The 'ADDITIONAL DATA' tab is active, displaying a table with the following columns: 'Type', 'Label', 'Expression', and 'Alias'. There are two rows of data:

Type	Label	Expression	Alias
<input type="checkbox"/> Simple field	Zip/Postcode	[profile/location/@zipCode]	
<input type="checkbox"/> Simple field	City	[profile/location/@city]	

Below the table is an 'Add an element' button and a section for 'Advanced options' which is currently collapsed.

Click **Confirm**

## Lesson 3 – Upload an external csv file with zip codes information

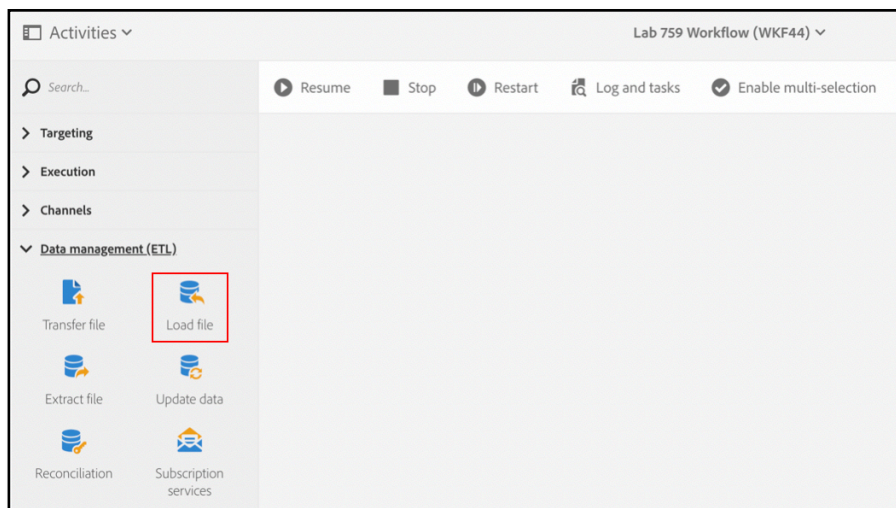
### Objective

In this lesson you will learn how to upload an external file into the workflow.

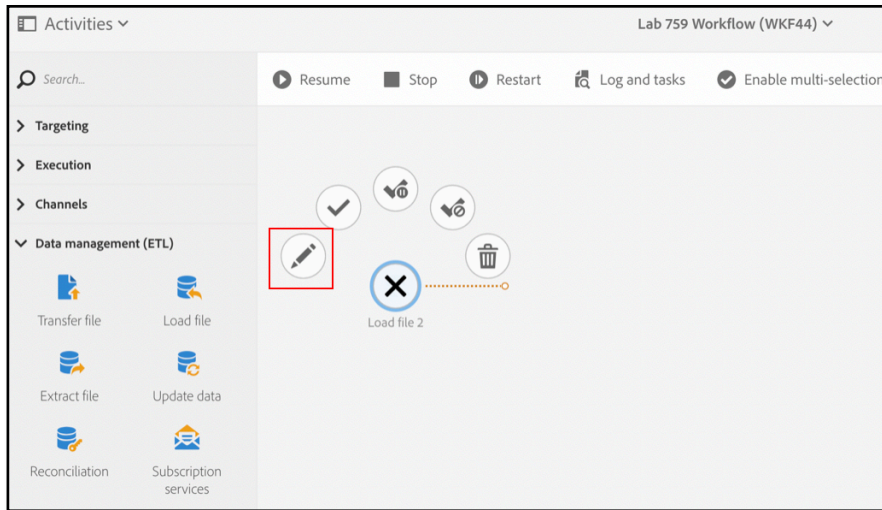
For the purposes of this exercise we downloaded a list of all zip codes located in 50 miles radius of Boston, MA, Austin, TX and San Francisco, CA. There are many ways to get all zip codes within a given radius, we used one of free publicly available websites.

### Exercise 3.1

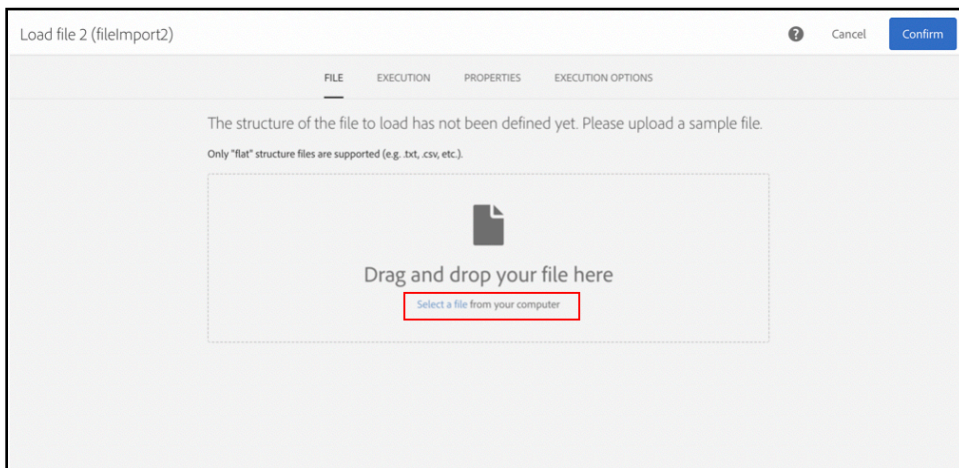
1. From the left hand-side panel, under the **Data Management (ETL)** section drag and drop the **Load file** activity into the workflow canvas.



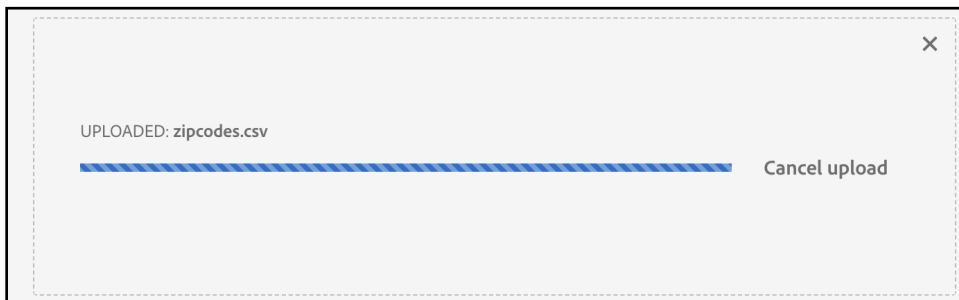
2. Click on the **Load file** activity to configure it



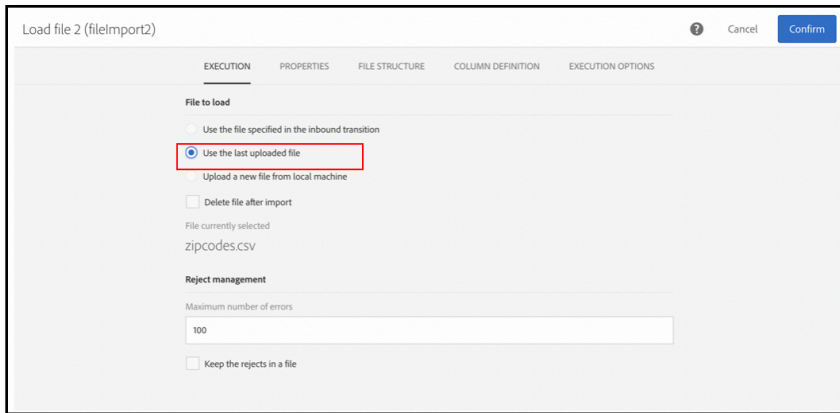
3. In the **File** tab, specify the file that you would like to upload.



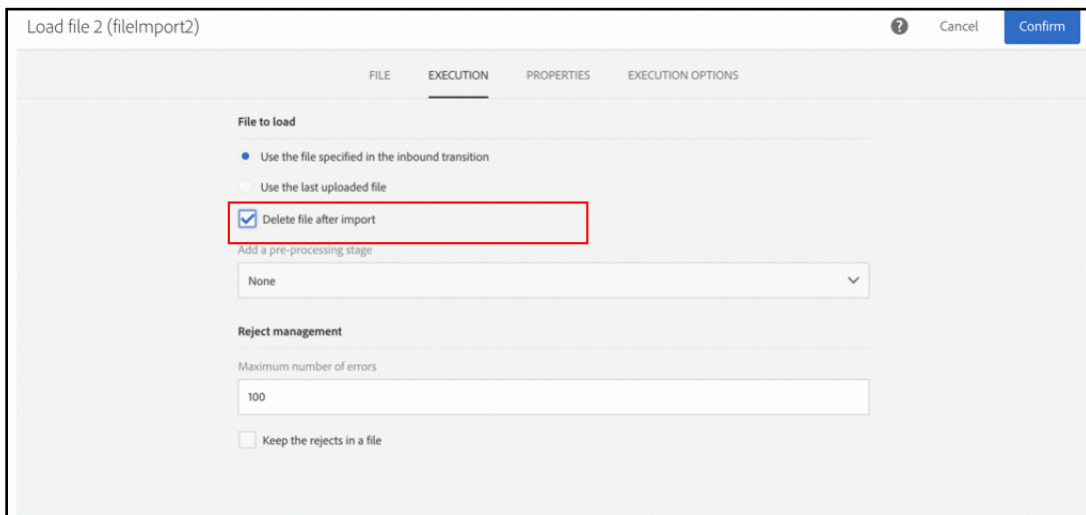
Wait until the file uploads



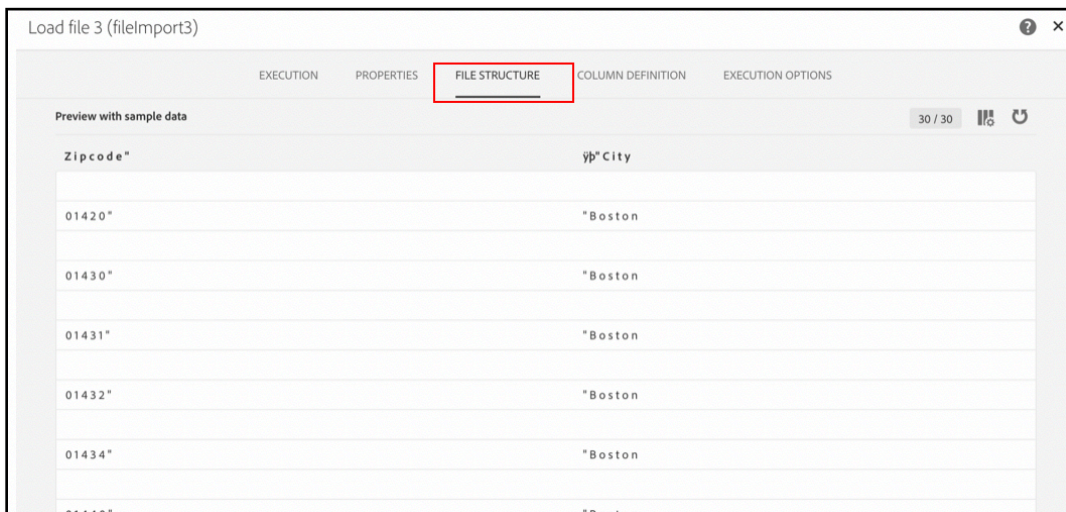
4. In the **Execution tab**, select **Use the last uploaded file**



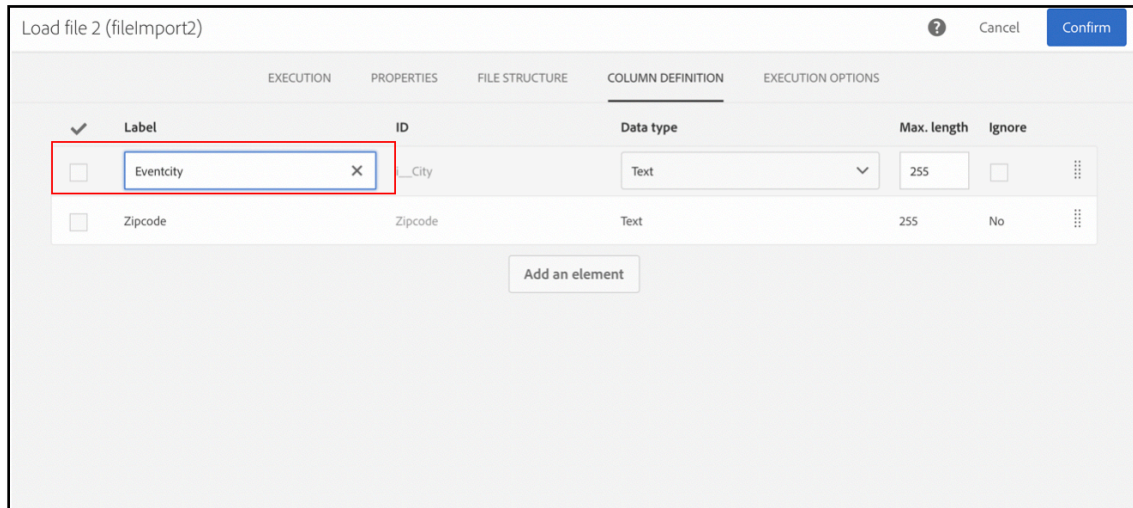
5. In the **Execution tab**, unclick “Delete file after import” to avoid having to reimport the file again



6. Check you have correct file, by checking **File Structure** tab



7. Check column labels in the **Column Definition** tab, see if there are any data issues, or formats need adjustments. You can change the label to **Eventcity**



## Lesson 4 – Reconcile zip code and city data using Enrichment activity

### Objective

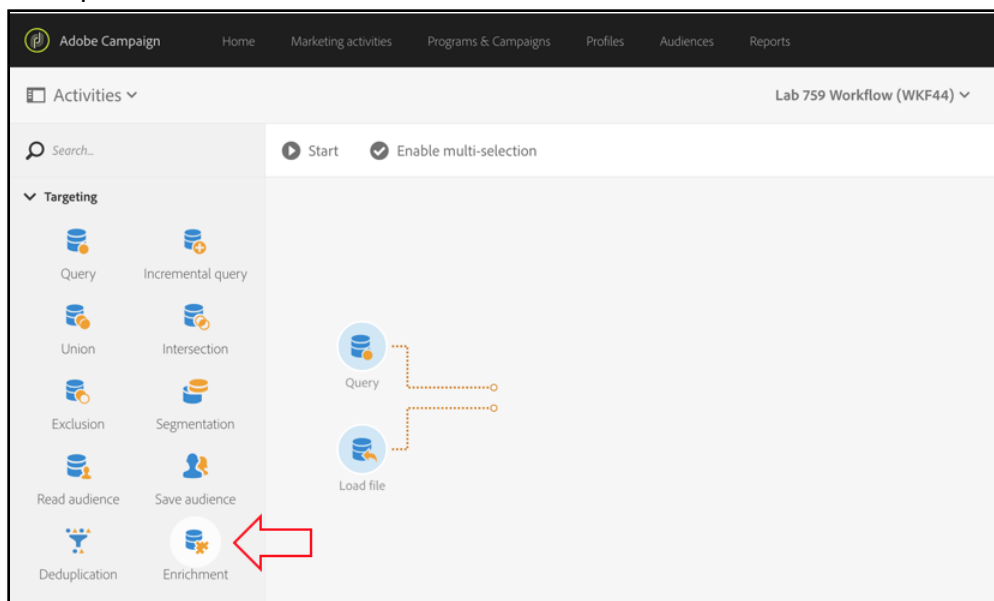
In this lesson you will learn how to enrich profile data with data contained in the file uploaded ad-hoc.

The **Enrichment** activity is an advanced activity that allows you to leverage additional data (which you can bring in just for one workflow) and reconcile that data with what is stored in your system.

Our business case today is – we want to target recipients who live close to where events will be hosted (Boston, MA; Austin, TX; San Francisco, CA). We will use the **Zip/Postcode** field of the profile resource and the **Zipcode** column of the imported file as reconciliation criteria.

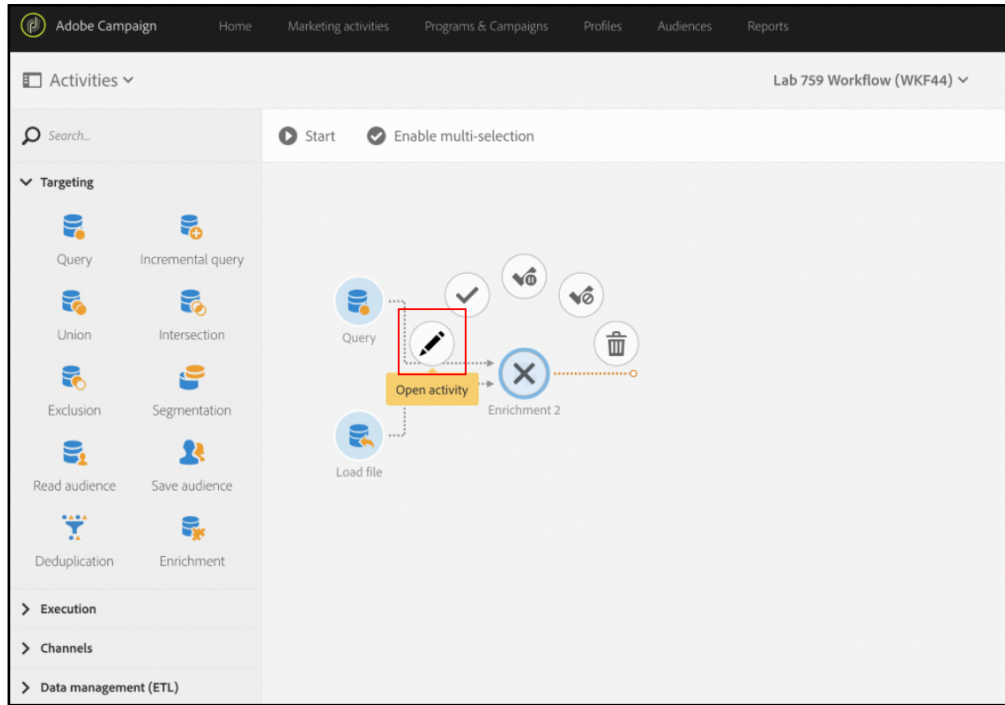
### Exercise 4.1

1. Drop the Activity **Enrichment** from Targeting on Left Hand Side Palette to workflow workspace.

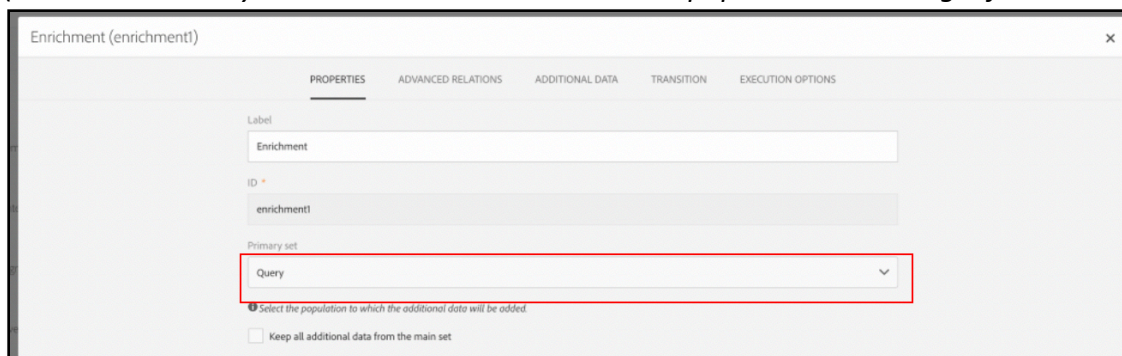


2. Select the activity, then open it for **Edit**.

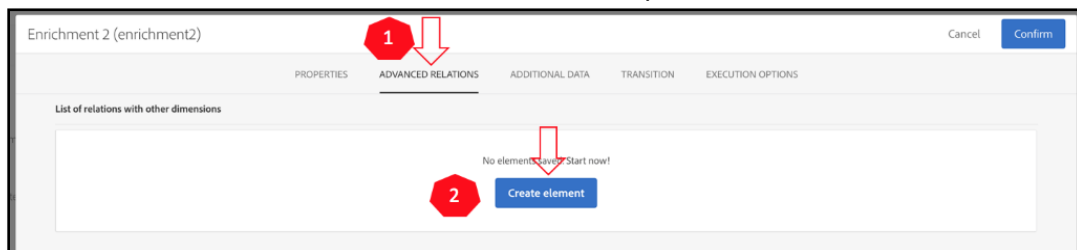




3. Click **Properties** and select **Query** as a primary set  
(it will allow you to add data to the population coming from the query).



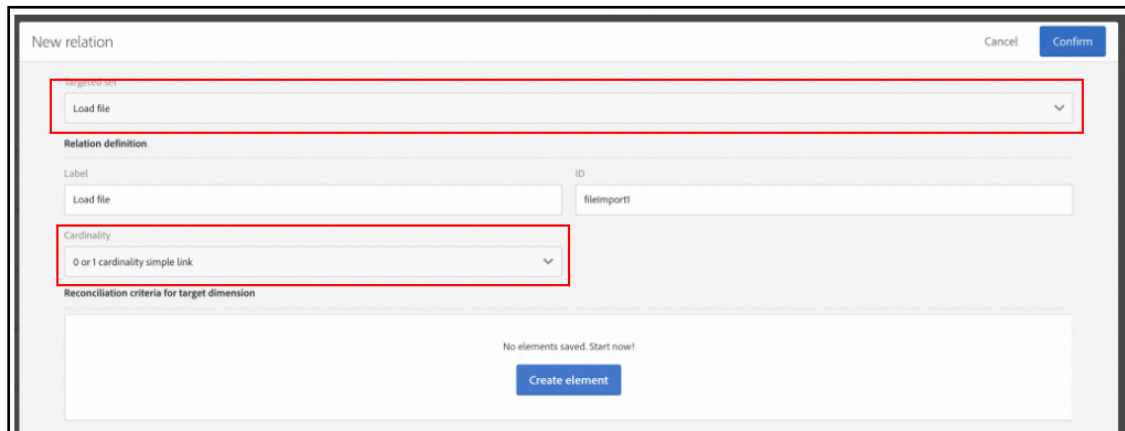
4. In the **Advanced relations** tab click **Create element** to create a link between the location data loaded from the file and the profiles selected in the **Query**.



We will use the "Zip code" field of the profile resource and the "Zip code" column of the imported file as reconciliation criteria.

5. In the **New relation** screen, specify the following options:

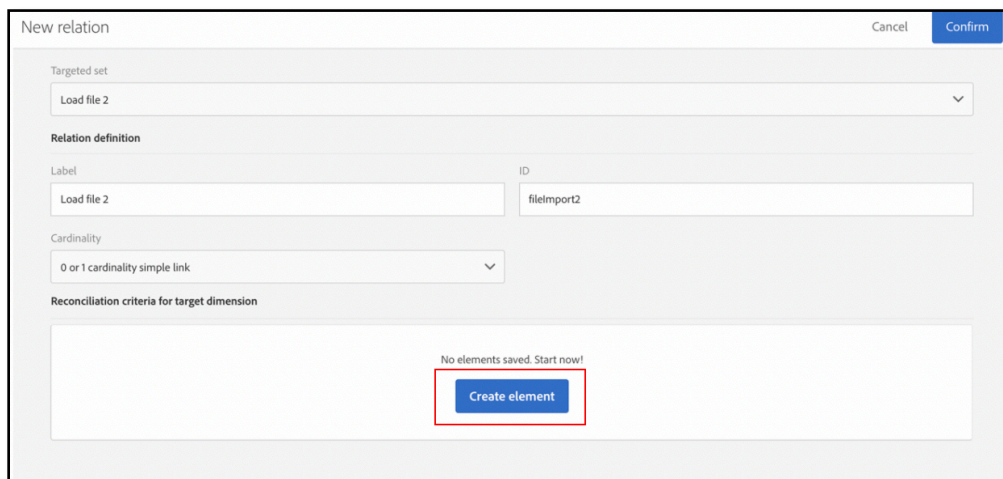
- Targeted set = **Load file**
- Cardinality = **0 or 1 cardinality simple link** (records from the primary set can be associated with 0 or 1 record from the linked data, but not more than one)



The screenshot shows the 'New relation' dialog box with the following configuration:

- Targeted set:** Load file
- Relation definition:**
  - Label:** Load file
  - ID:** fileImport1
  - Cardinality:** 0 or 1 cardinality simple link
- Reconciliation criteria for target dimension:** (Empty field)
- Buttons:** Cancel, Confirm, Create element

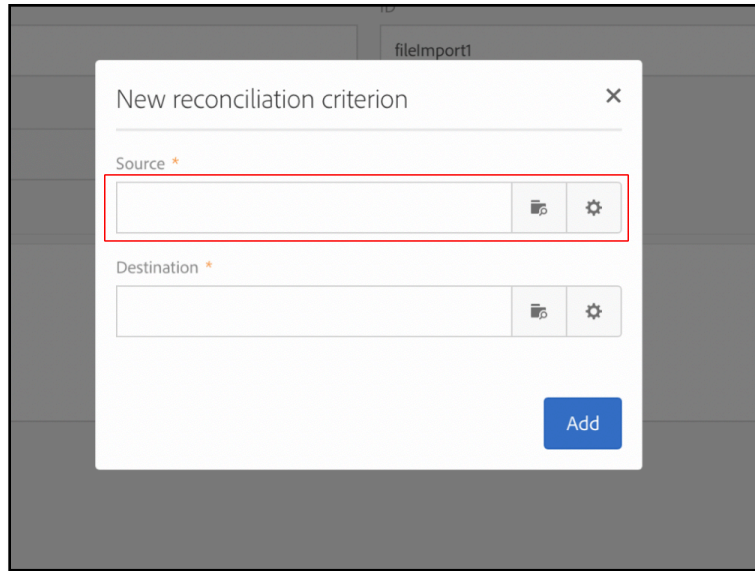
6. Click **Create element** to create the reconciliation criteria for the target dimension. We will define the reconciliation criterion by selecting the source (profile table) and the destination (load file).



The screenshot shows the 'New relation' dialog box after clicking 'Create element'. The configuration is updated as follows:

- Targeted set:** Load file 2
- Relation definition:**
  - Label:** Load file 2
  - ID:** fileImport2
  - Cardinality:** 0 or 1 cardinality simple link
- Reconciliation criteria for target dimension:** (Empty field)
- Buttons:** Cancel, Confirm, Create element (highlighted)

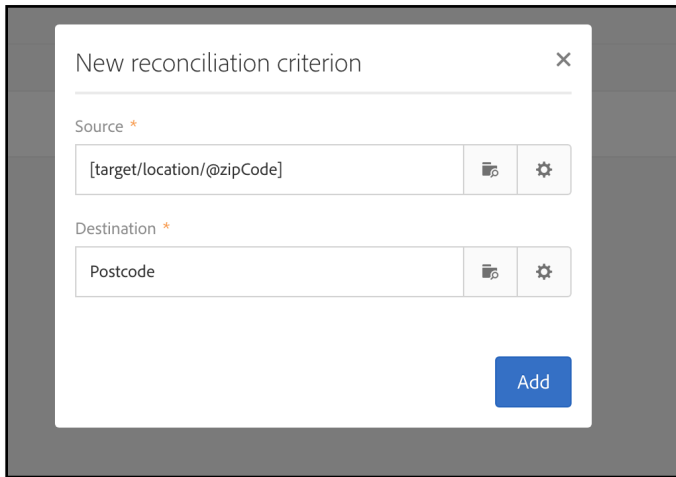
7. In the **Create element** window, under **Source** select Zip/Postcode by choosing **Profile** first, then **Location** then **Zip/ Postcode** click **Confirm**



8. In the **Create element** window, under **Destination** select **Zipcode** and click **Confirm**

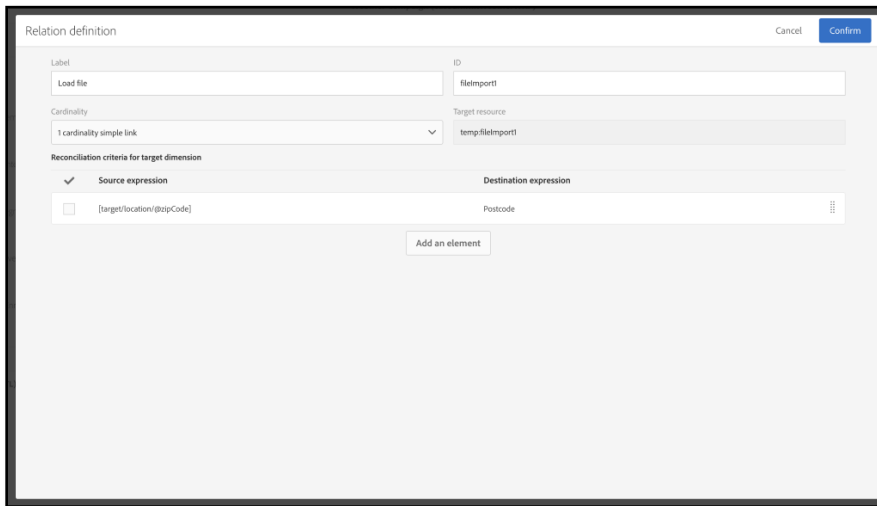


## 9. Click **Add**



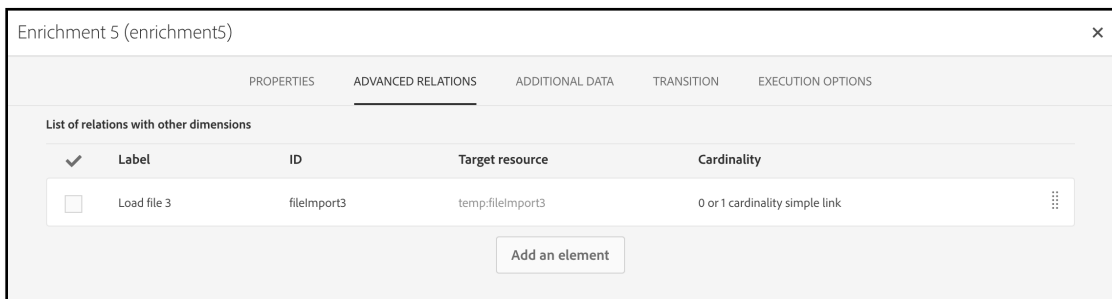
A dialog box titled "New reconciliation criterion" with a close button (X) in the top right corner. It contains two input fields: "Source \*" with the value "[target/location/@zipCode]" and "Destination \*" with the value "Postcode". Each input field has a trash icon and a settings gear icon to its right. A blue "Add" button is located at the bottom right of the dialog.

## 10. Reconciliation criteria is defined, now click **Confirm**



A "Relation definition" dialog box with "Cancel" and "Confirm" buttons in the top right. It shows a "Label" field with "Load file" and an "ID" field with "fileimport". The "Cardinality" is set to "1 cardinality simple link". The "Target resource" is "temp:fileimport!". Under "Reconciliation criteria for target dimension", there is a checked checkbox for "Source expression" with the value "[target/location/@zipCode]" and a "Destination expression" field with the value "Postcode". An "Add an element" button is at the bottom.

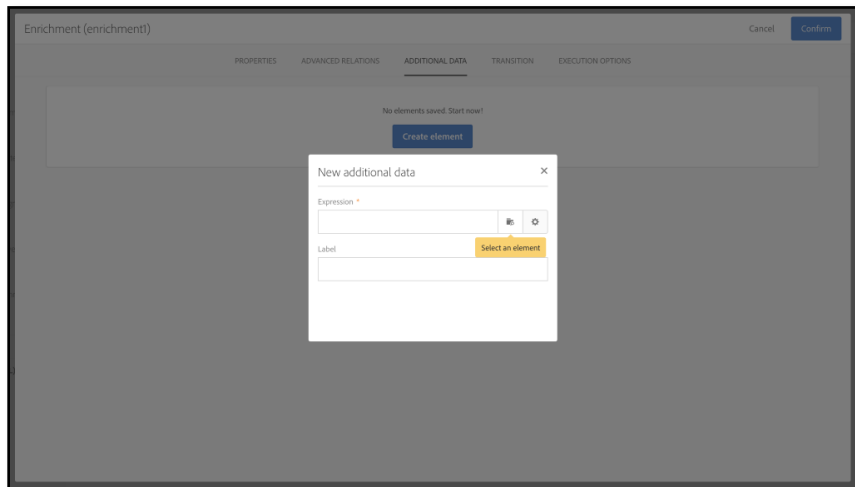
Result should look like this



An "Enrichment 5 (enrichment5)" dialog box with tabs for "PROPERTIES", "ADVANCED RELATIONS", "ADDITIONAL DATA", "TRANSITION", and "EXECUTION OPTIONS". The "ADVANCED RELATIONS" tab is active, showing a "List of relations with other dimensions" table. The table has columns for "Label", "ID", "Target resource", and "Cardinality". One row is visible with a checked checkbox, "Load file 3", "fileimport3", "temp:fileimport3", and "0 or 1 cardinality simple link". An "Add an element" button is at the bottom.

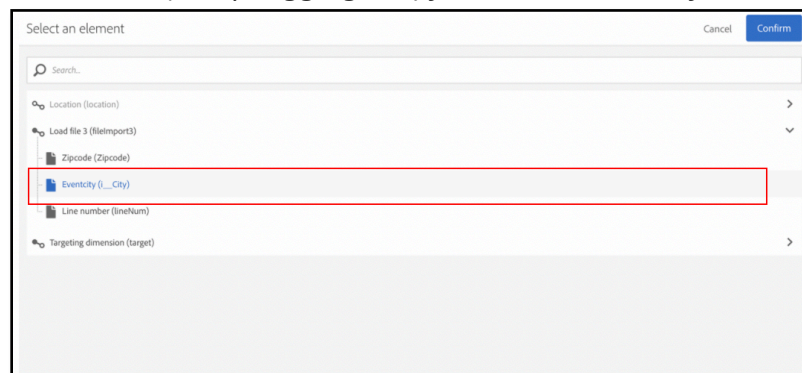
	Label	ID	Target resource	Cardinality
<input checked="" type="checkbox"/>	Load file 3	fileimport3	temp:fileimport3	0 or 1 cardinality simple link

## 11. Click **Additional data** tab, add a new element

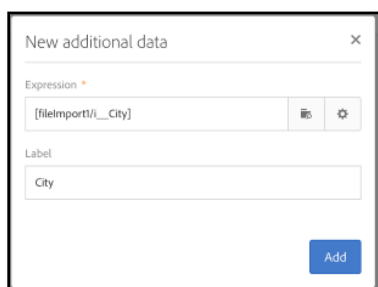


## 12. In the window that opens, in the **Expression** field, select one of the fields available directly with one of the linked dimensions. In our case it is **Load file (fileImport)** and click **Confirm**.

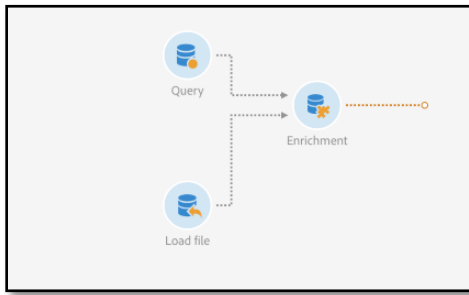
- a. *For your information: You can edit expressions and use functions or simple calculations (except aggregates) from the dimension fields.*



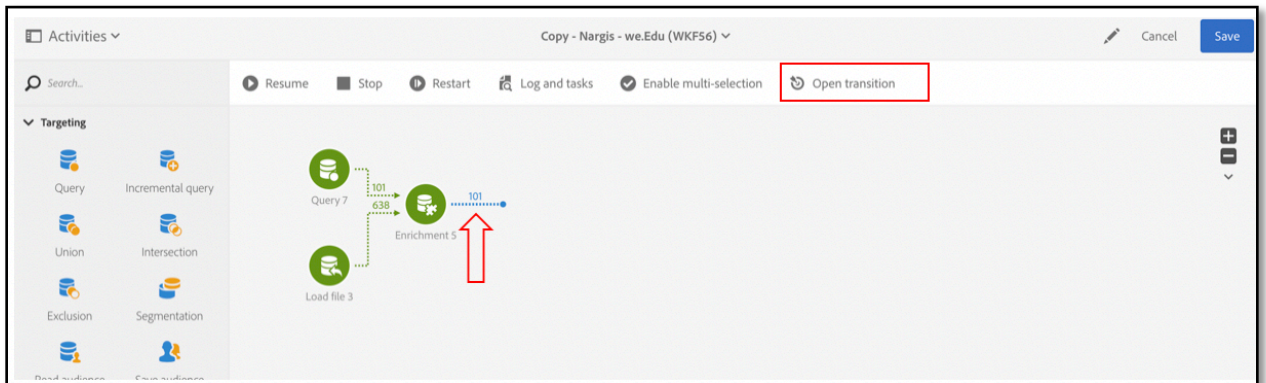
## 13. Click **Add** to confirm adding the field to the additional data, then click **Confirm** and **Save**. When the query is executed, an additional column corresponding to the field added will be present in the activity's outbound transition.



Your workflow should look like this



14. Run the workflow and click on **Open Transition** to see the results



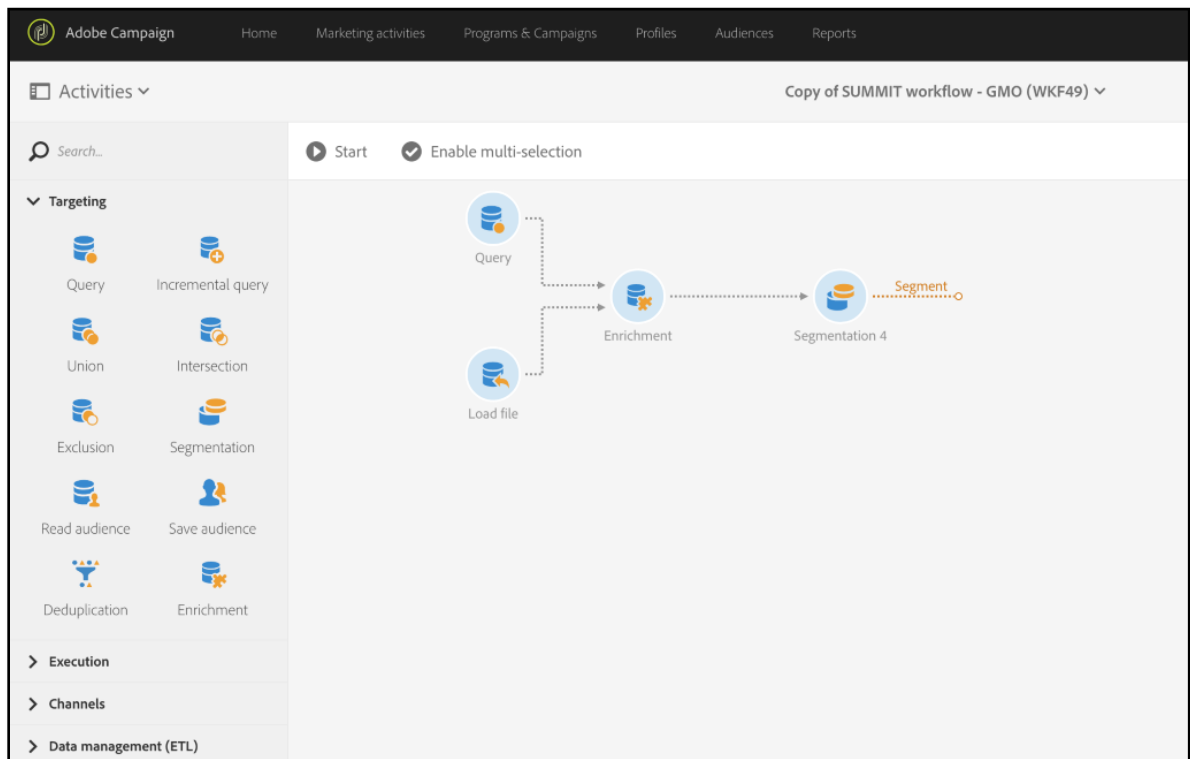
## Lesson 5 – Segment the targeted population in 2 part: Recipients who match the city loaded and all the others.

### Objective

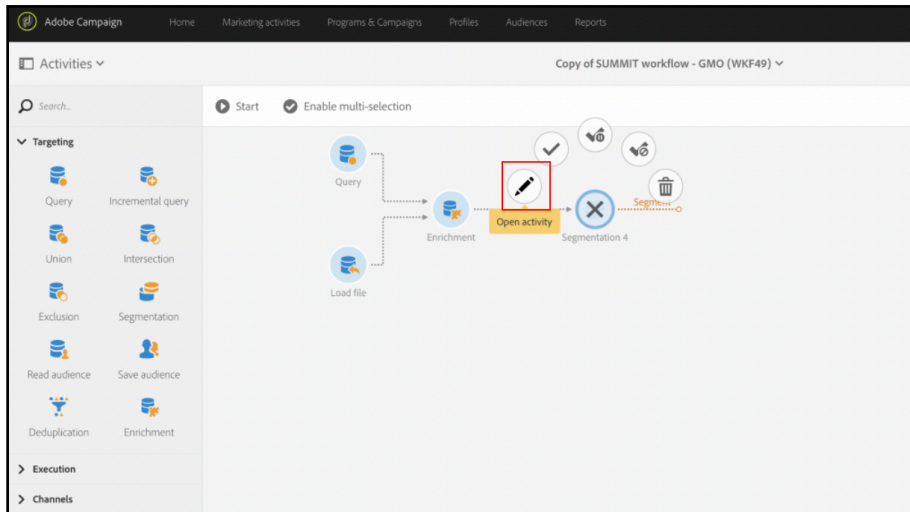
In this lesson you will learn how to segment population based on whether recipients were matched with additional data. In our case, we would segment our population into two: all recipients who live within 50 miles radius of the event city and everyone else.

### Exercise 5.1

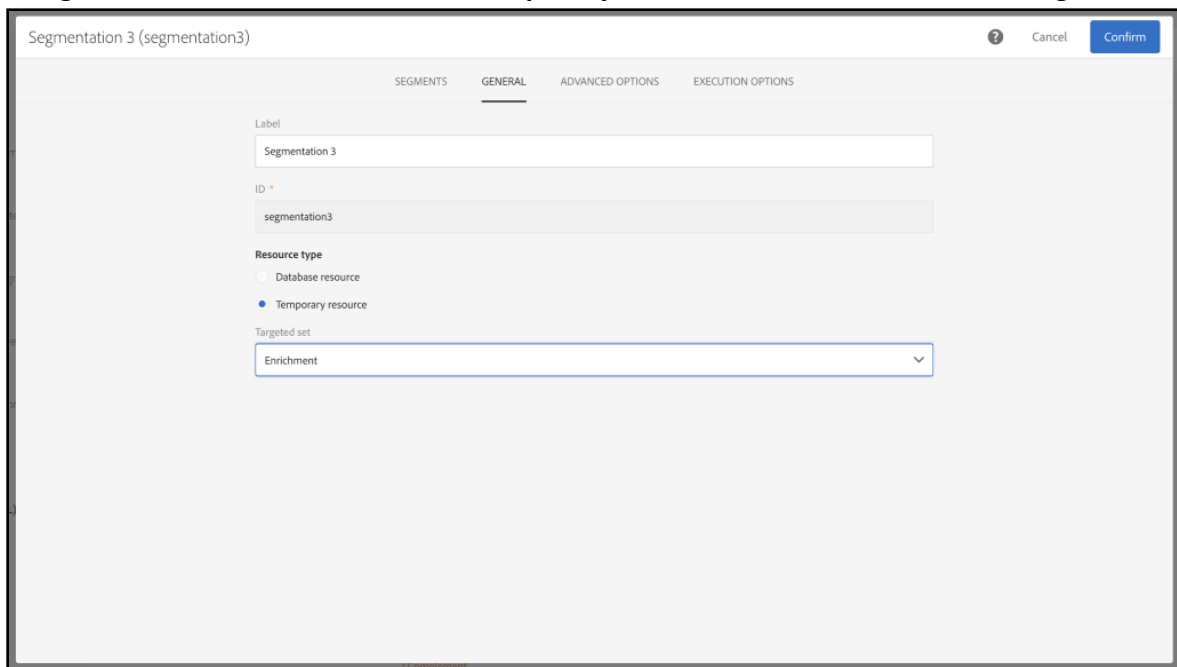
1. Drag and drop **Segmentation** activity from **Targeting** on the lefthand side of the Workflow canvas.



2. Click on the activity and open it for editing



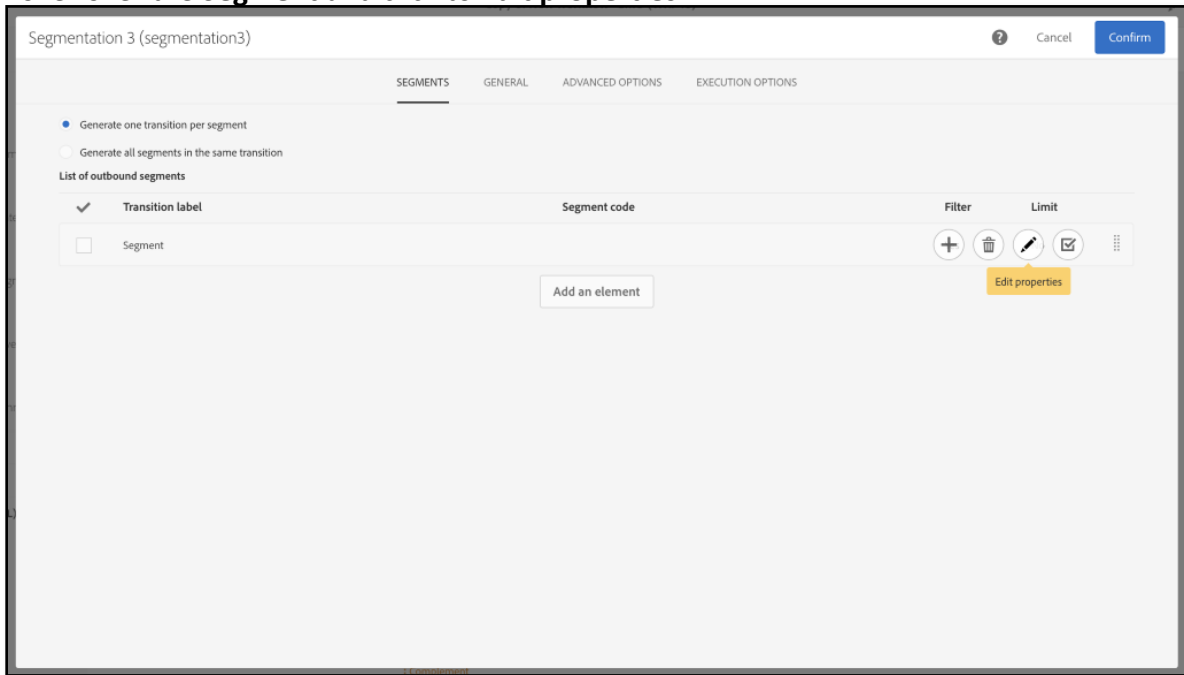
3. Navigate to **General** tab, and select **Temporary resource** and **Enrichment** as a targeted set



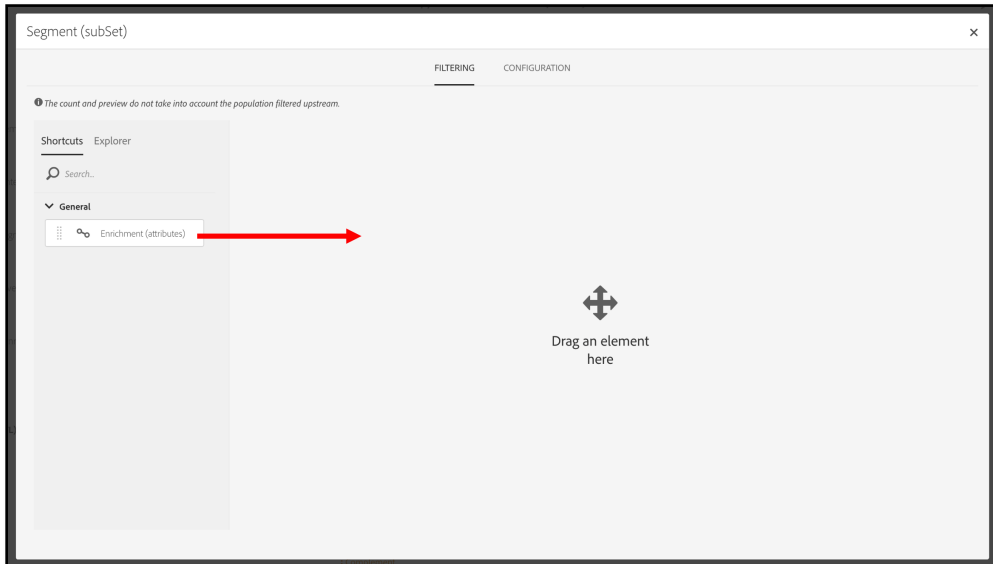
4. Navigate to **Segments** tab



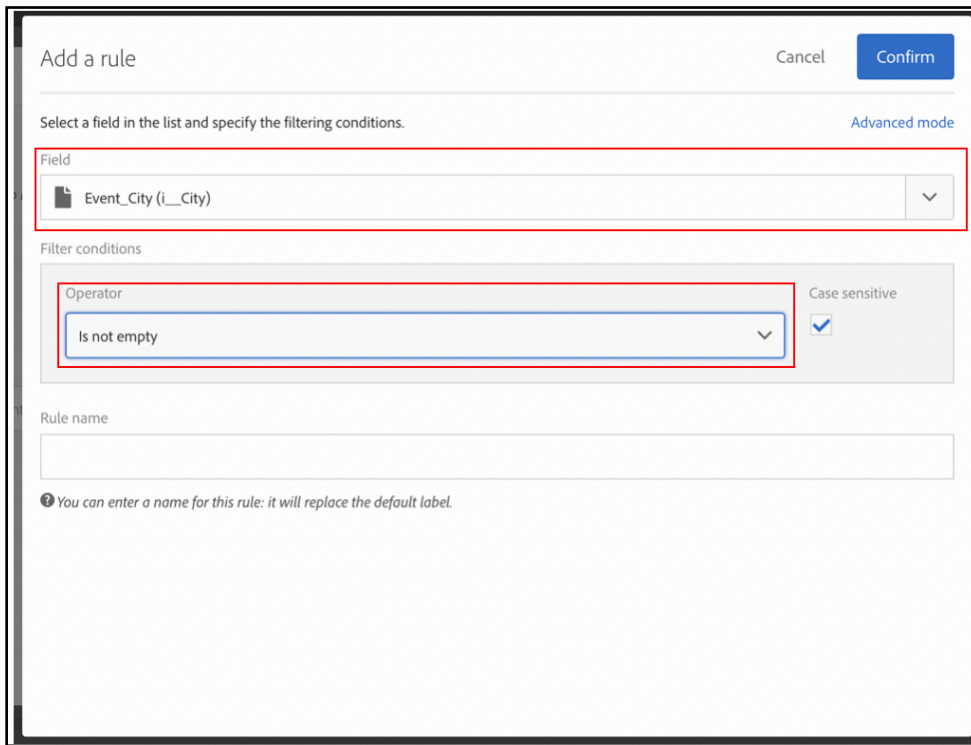
5. Hover over the **Segment** and click to **Edit properties**



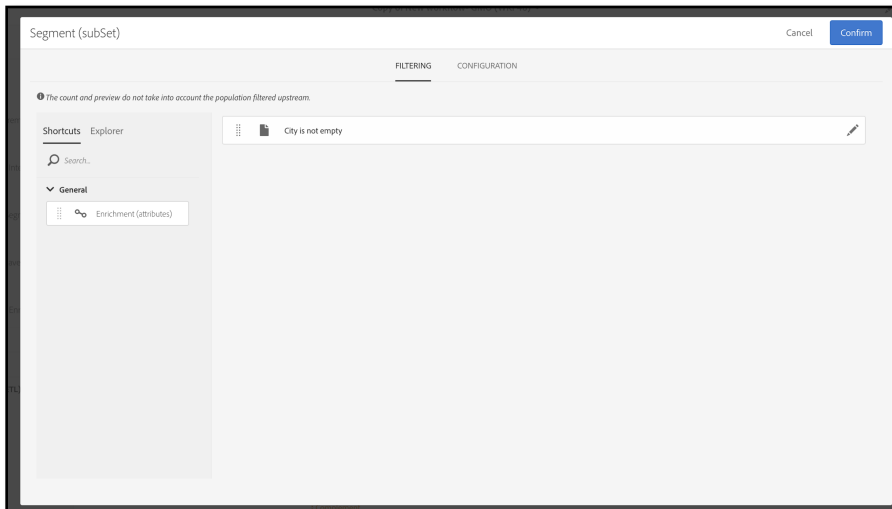
6. Drag and drop the **Enrichment (attributes)** component in the filtering canvas



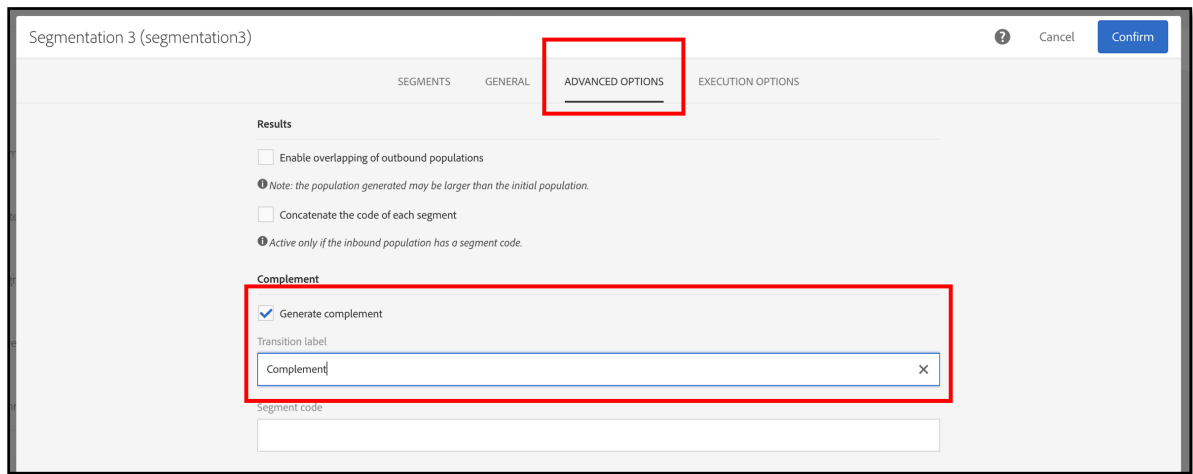
7. In the window that opens, we will define the segmentation rule. Select **Event\_City** field and **Is not empty** as a filter condition (Operator) then click **Confirm**.



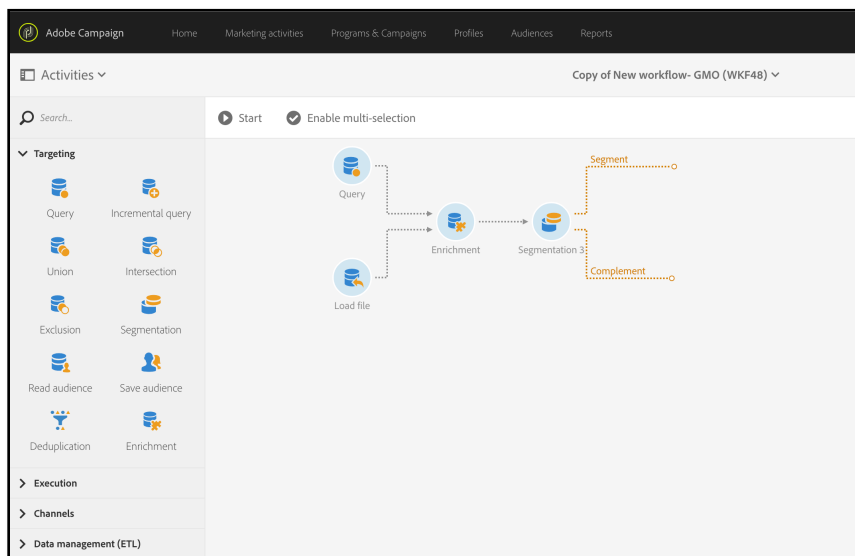
8. Click **Confirm** again to validate the subset.



- In the **Advanced options** tab, click **Generate complement** because we would like to exploit the remaining population, then click **confirm**.

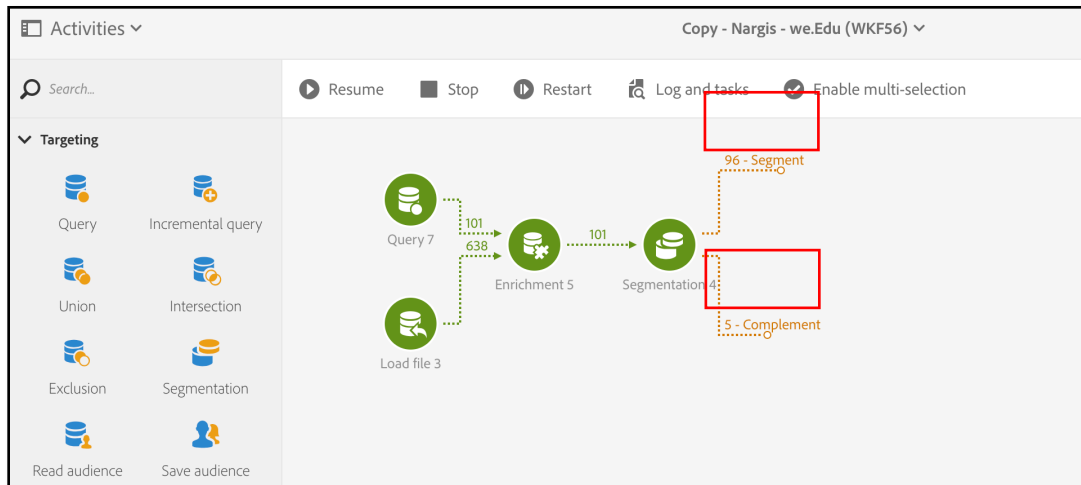


- Your result should look like this



- **Segment** = the population who live close to where events will be hosted (Boston, MA; Austin, TX; San Francisco, CA).
- **Complement** = All other recipients

11. Run the workflow, click on **Open Transition** to see the results.  
Make sure you have the event city in the **Segment data**



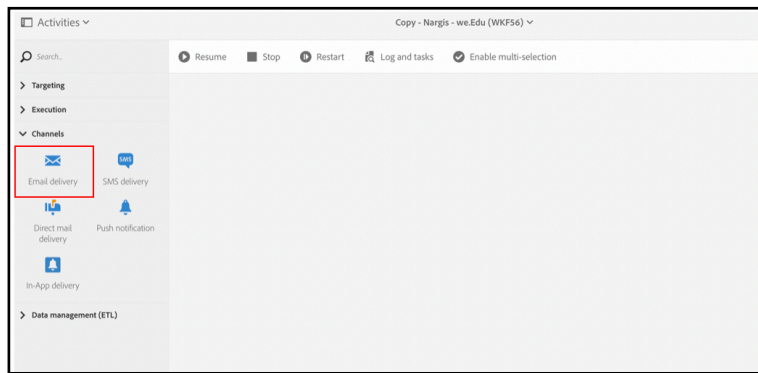
## Lesson 6 – Create a dynamically populated email

### Objective

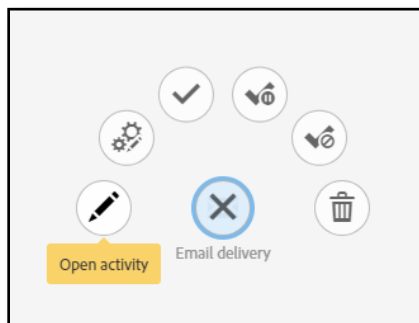
In this lesson you will learn to create a dynamically populated email, which will feature relevant picture and event details for the event planned.

### Exercise

1. Drag and drop the **Email Delivery** activity from **Channels** section of the left-hand side of the Workflow canvas



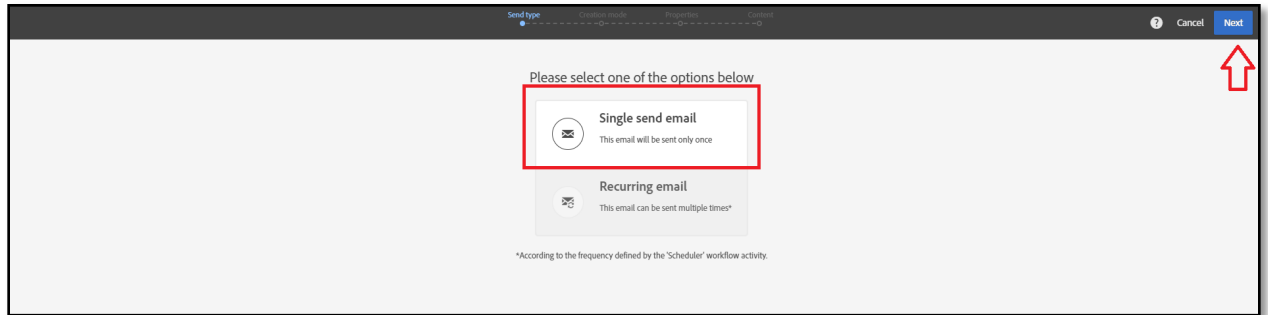
2. Click on **Email Delivery** to edit the activity



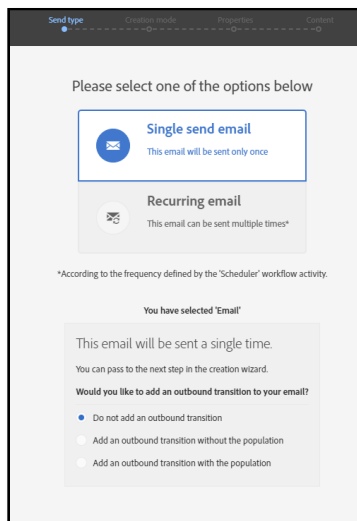
3. You are shown a page where you must choose the type of email – single send or recurring. In this demo we would go with a single send. You can choose recurring if you would like this email to be sent more than once to the same group or different groups.

The **Email delivery** activity is generally used to automate sending an email to a target calculated in the same workflow. When linked to a Scheduler activity, it can be used to automatically send emails based on specified frequency.

Click **Next** to move on to defining email template.



4. When you choose to **Single send email** you also get following options to define outbound transition in email.



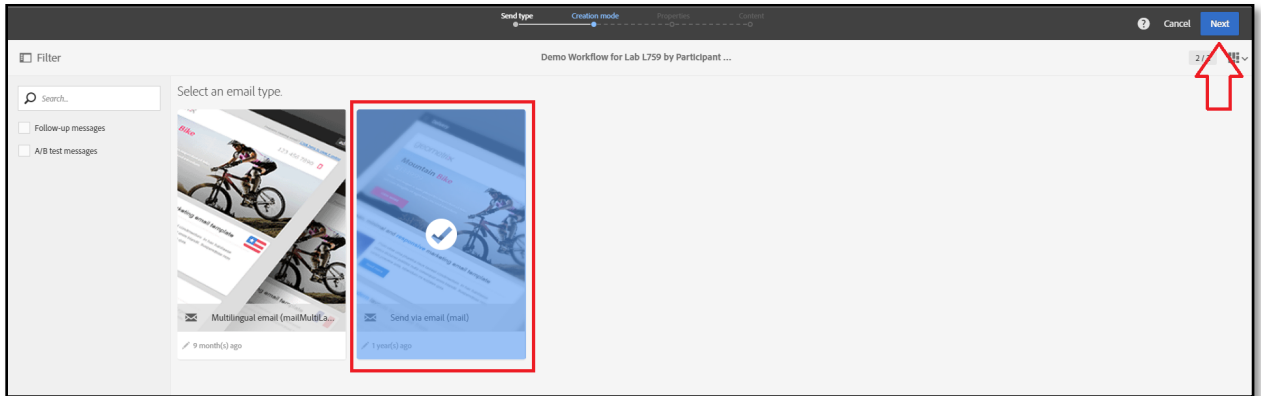
By default, the Email delivery activity does not include any outbound transitions.

Following outbound transitions can be added:

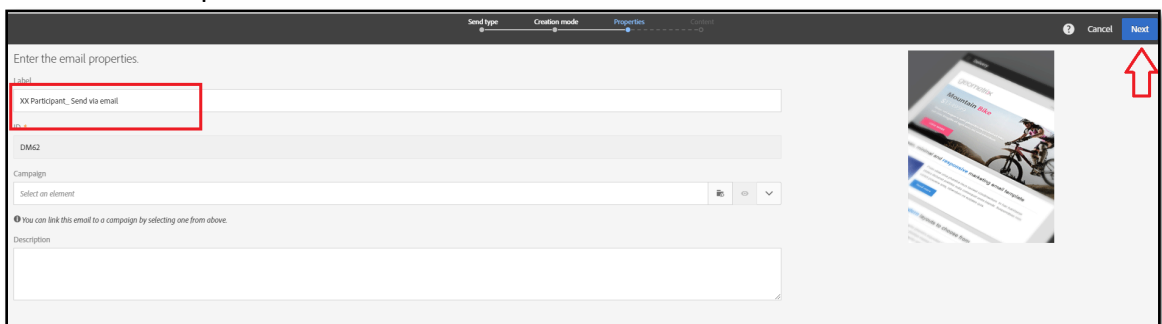
- a. Add outbound transition without the population: this lets you generate an outbound transition that contains the exact same population as the inbound transition.
- b. Add outbound transition with the population: this lets you generate an outbound transition containing the population to whom the email was sent. The members of the target excluded during the delivery preparation (quarantine, invalid email, etc.) are excluded from this transition.

For this workflow we won't add any outbound transition

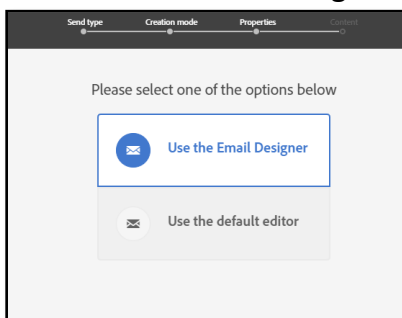
5. Select **Send via email** and click **Next**



## 6. Enter Email Properties – Add Label as follows

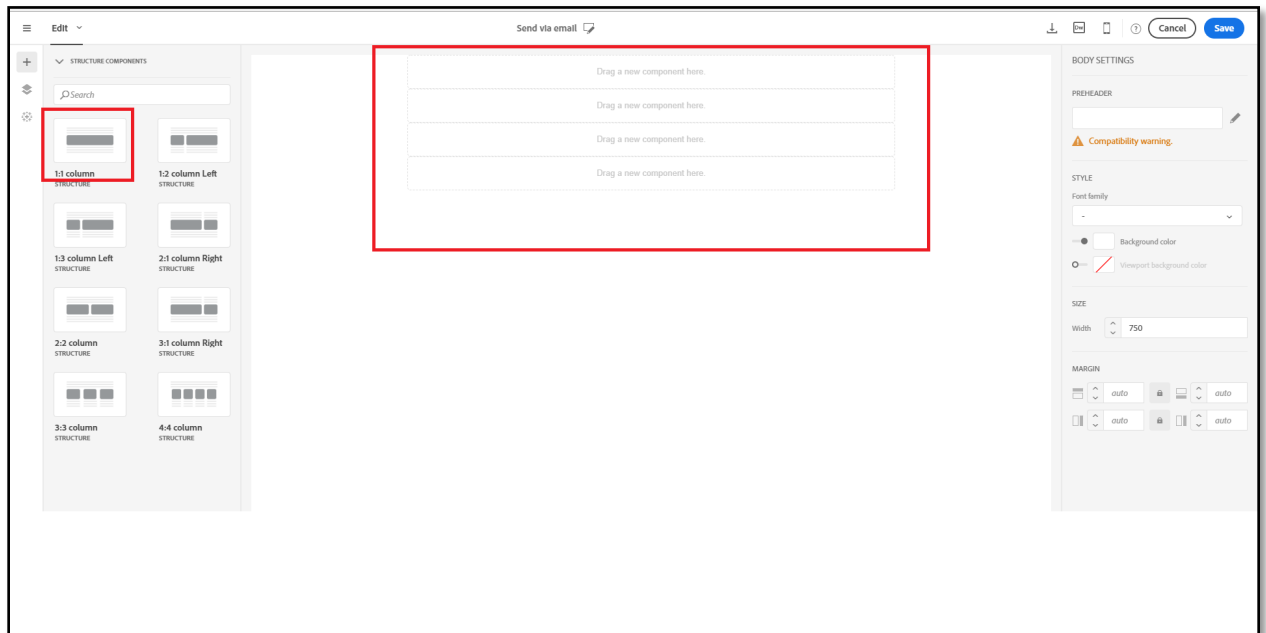


## 7. Select Use the Email Designer

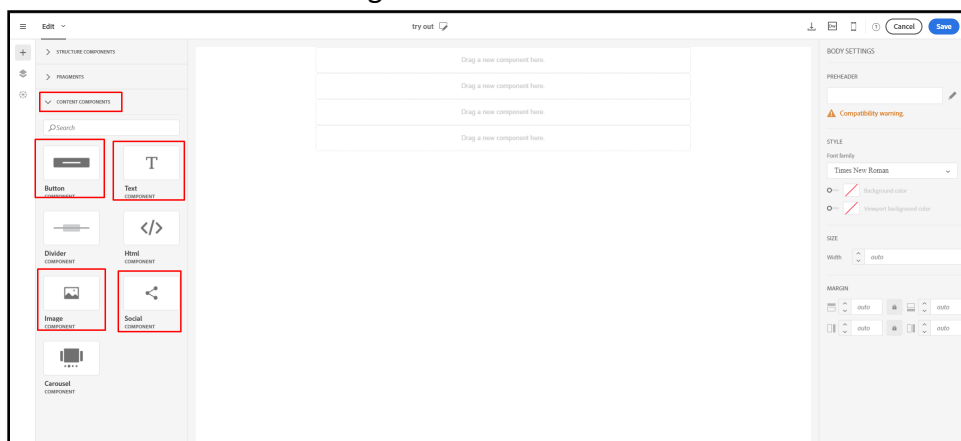


When in the Email Designer, as a first step we will define the structure of the Email.

- Under **Structure Components** section, select and drag and drop **1:1 column**  
Now, we will fill in these Structure components to build out the email



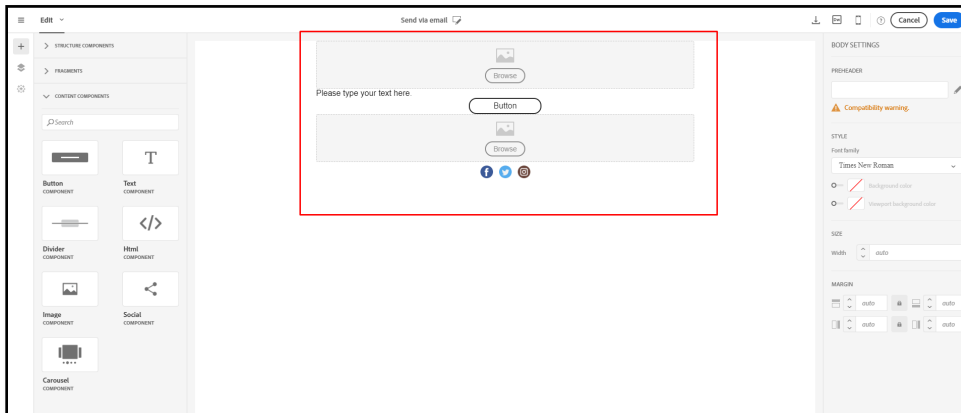
- Under **Content Components** section on the left-hand side of the Email Designer select the elements in the following order:



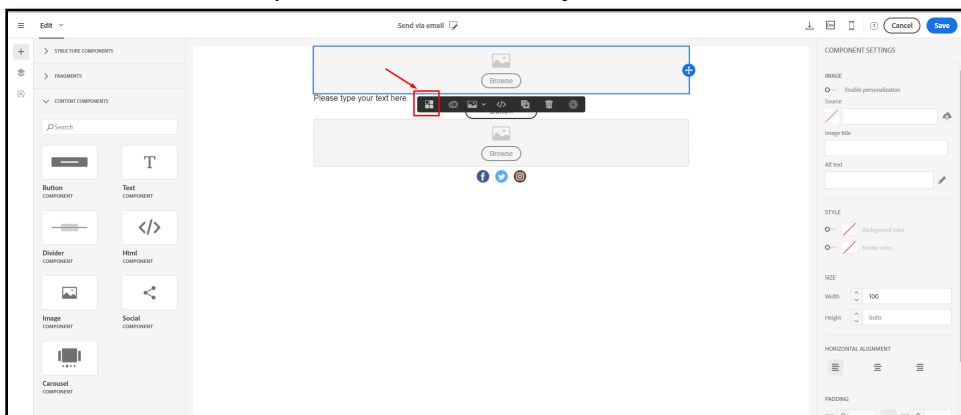
- Drag and drop the **Image** component into the first structure.
- Drag and drop the **Text** component in second structure. Also drag and drop a **Button** in same structure
- Drag and Drop another **Image** component into the third structure
- Drag and Drop the **Social** component into the fourth structure



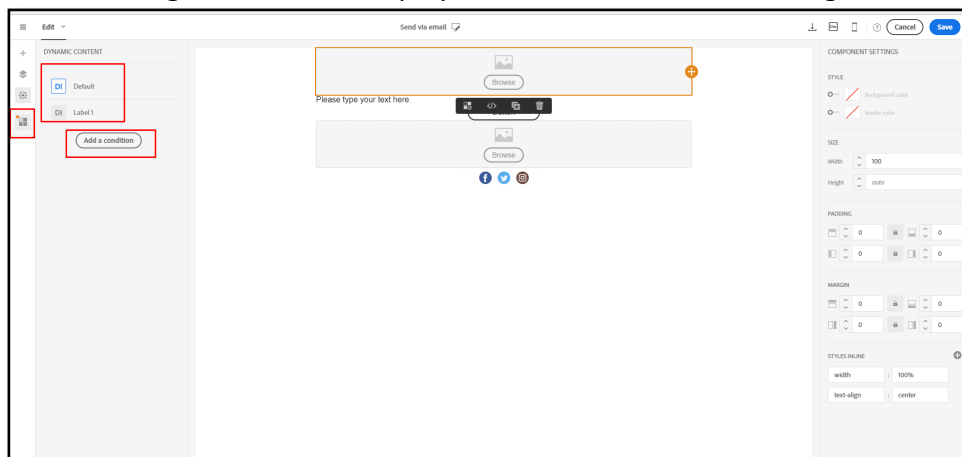
10. The final layout and structure should look like following.



11. Click on the first component, and choose **Dynamic Content**



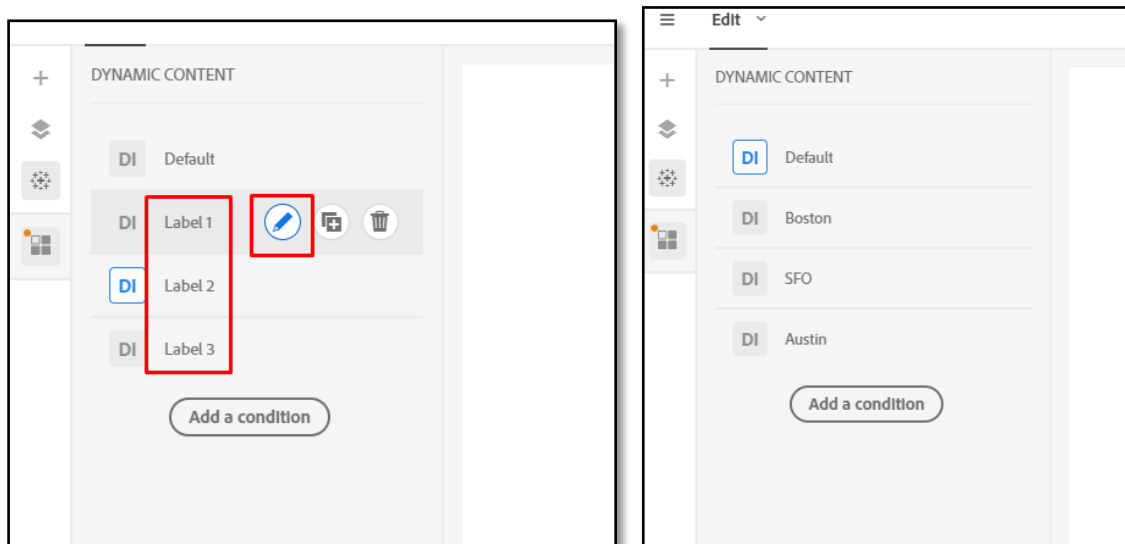
12. As you click on this button for enabling **Dynamic content**, you will see that the left hand side rail changes and it now displays several versions of this image



In our case, as we are targeting recipients in three cities we need three variants, we will also have a default variant, so four in total.

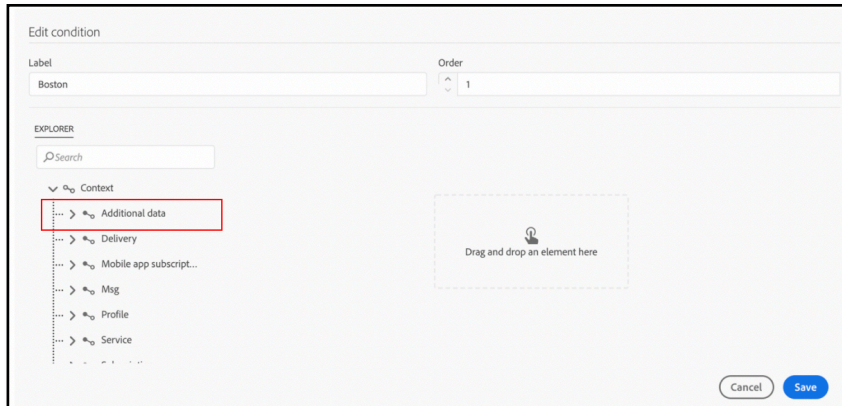
It is best practice to use default variant and serve it to the recipients who do not belong to a specific group, or who have their details incomplete. All others will then receive custom variants that match specific rules. In our case we do not need to do this because we have previously excluded everyone who did not match with an event city.

We will have three conditions along with a default variant. Once we add conditions, as you hover over them with a mouse, you will see option to edit. Go ahead and label variants accordingly.

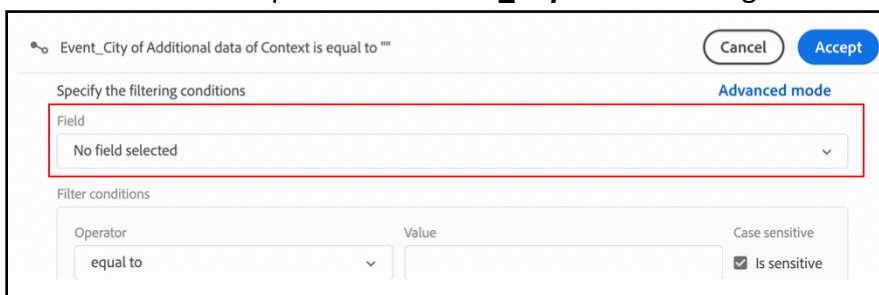


Now we will add conditions and images to each of the variants.

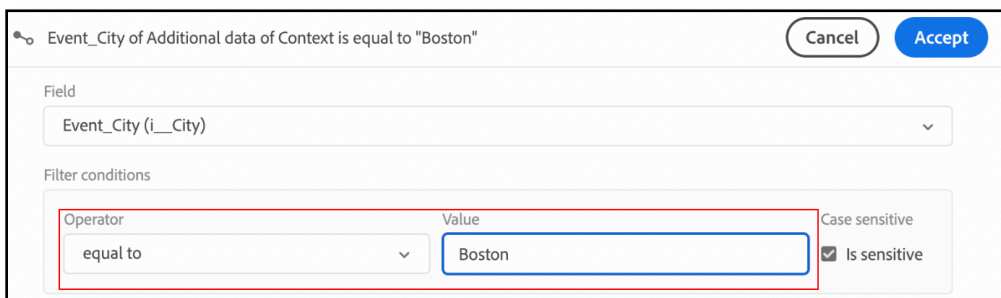
13. Edit **labels** and **Image** components.
14. Click on the **Pencil sign** on the label. In the **Edit Condition** window, drag and drop **Additional data**



15. In the window that opens select **Event\_city** as the filtering condition

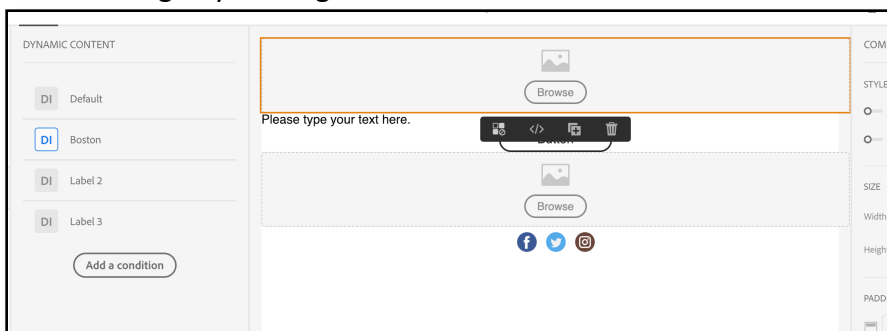


16. Set the **Event\_city** equal to **Boston**. You can uncheck **sensitive** if you do not want to be case sensitive

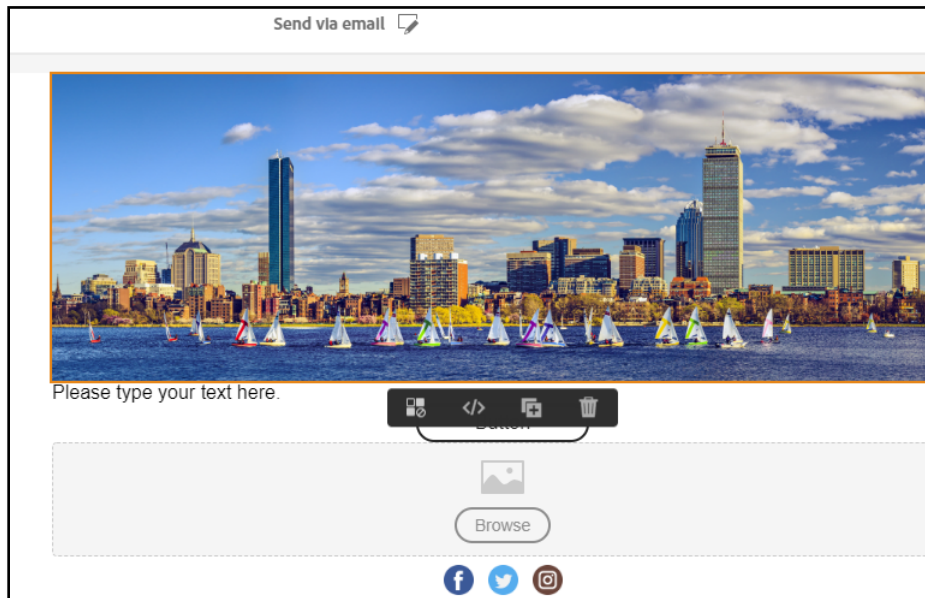


17. Click Accept and Save

18. Add the image by clicking on the **Browse** button



Pick the file from the folder



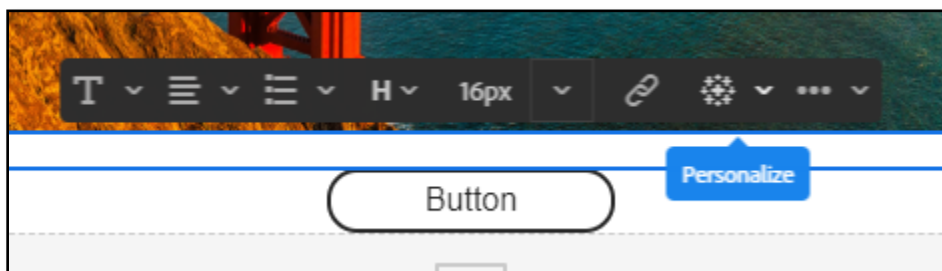
Repeat the steps for San Francisco and Austin.  
Now let's add other content components.

19. Navigate to **Text** component. You can personalize event details in the same way as we did with the city. In the interest of time we will skip this part.

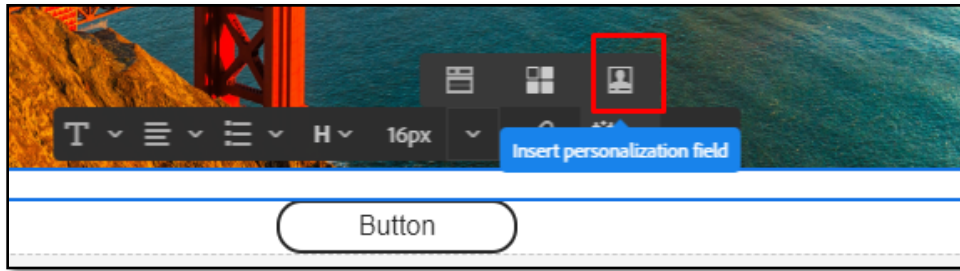
*"We.Edu is coming to your city. Meet alums, current students, and faculty. Learn how our programs can benefit your career. Make your dreams come true, follow your passion!"*

*Admission is free, but RSVP is required"*

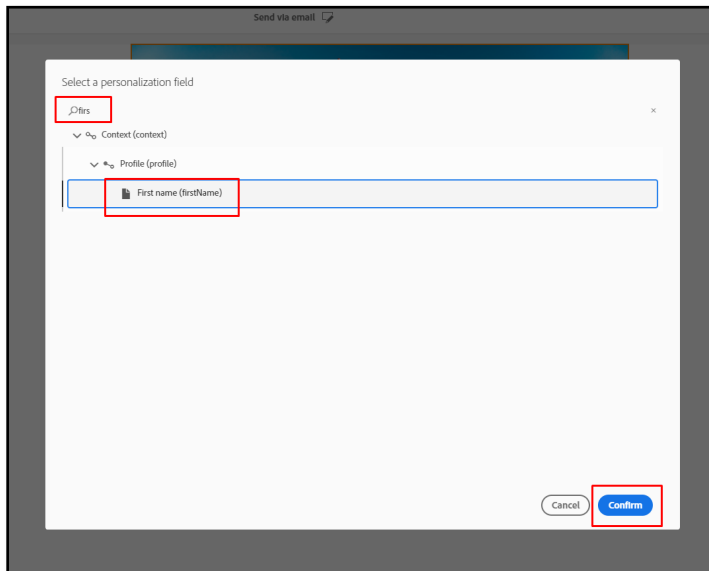
In the text component start typing. As you hover over, you will see a bar, choose the option for personalization



Add the option for personalization variable



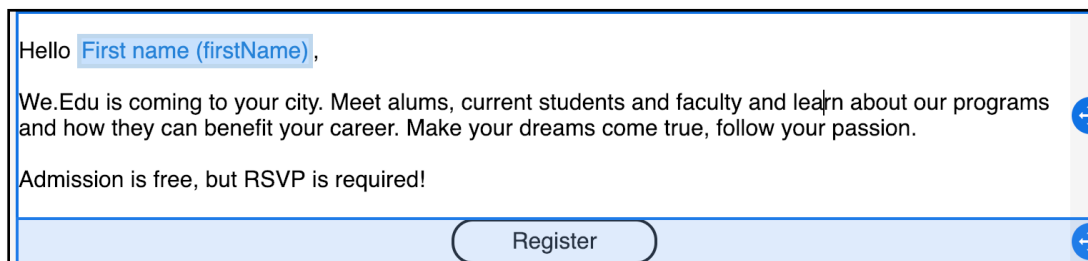
Select and type **First name**, click on **Confirm**.



20. Type the rest of the content, you can also copy it from Word file (titled Email message body) in the folder that had the images.

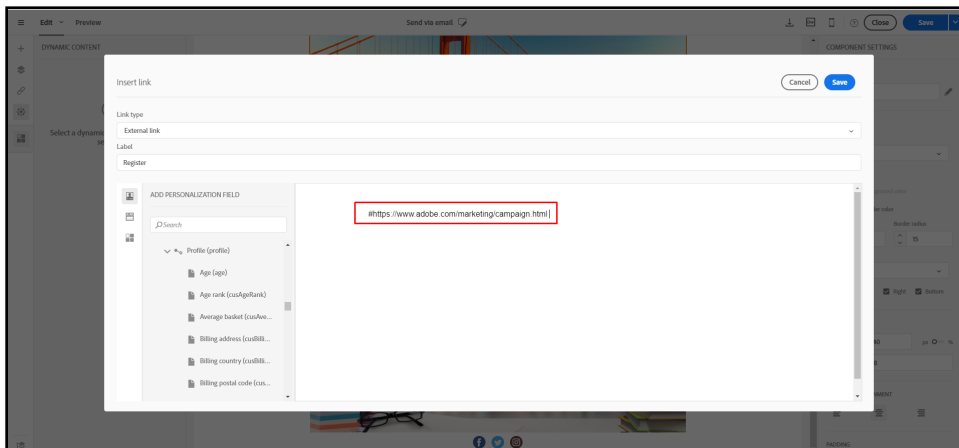
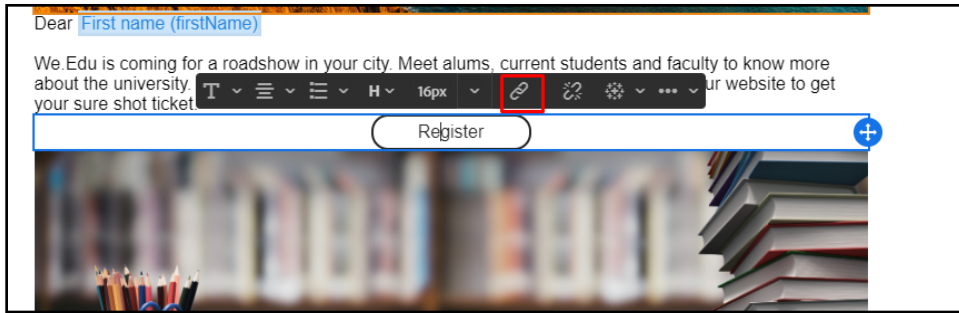
Change the label of the **Button** to *“Register”*

Result should look like this



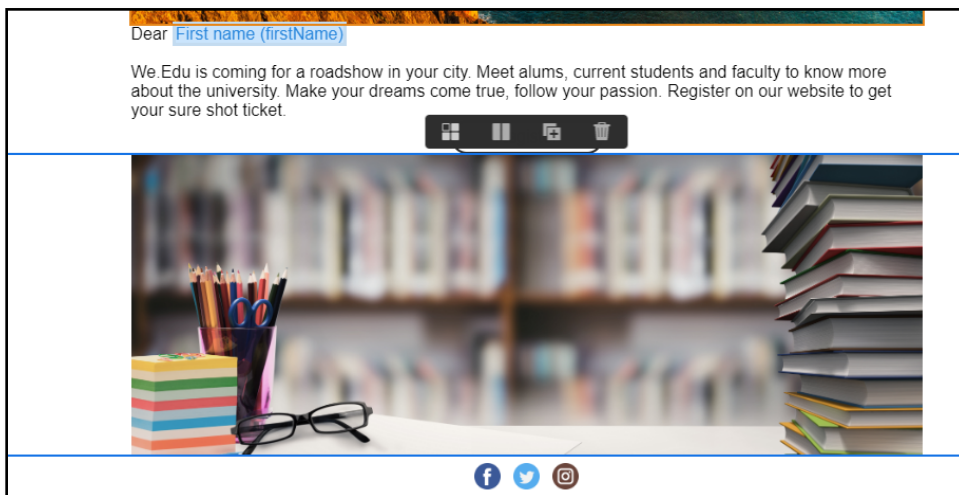
21. We also need to add a Landing page URL to *“Register”*

Use the option for **Insert Link**

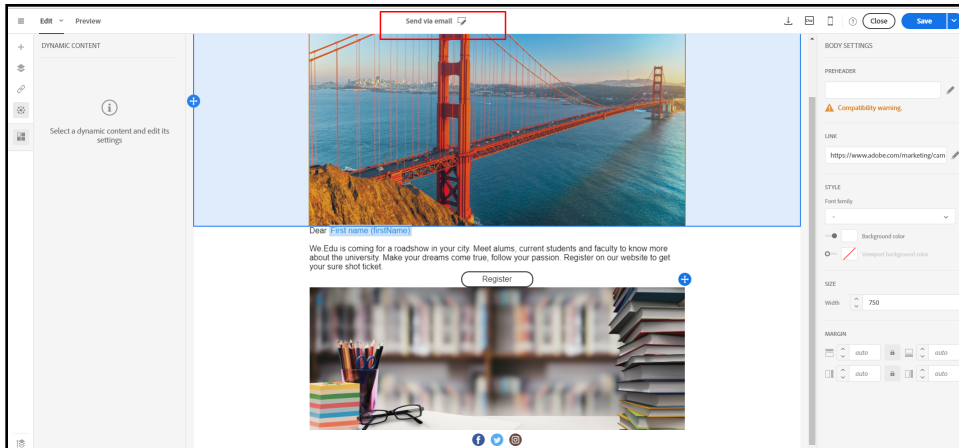


22. Now let's add the third image. We will keep the third image same across all variants. In our Lab folder find and insert file named "Second image"

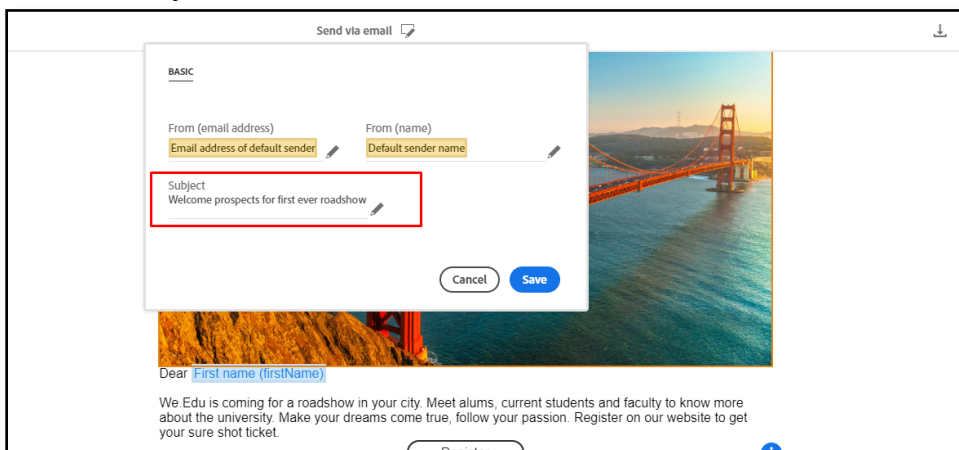
Your email should look like something below



23. Let's also add the subject line .  
On the top of the screen click on the **Edit** sign.



Enter the subject line



Subject Line is “We.Edu in your city!”

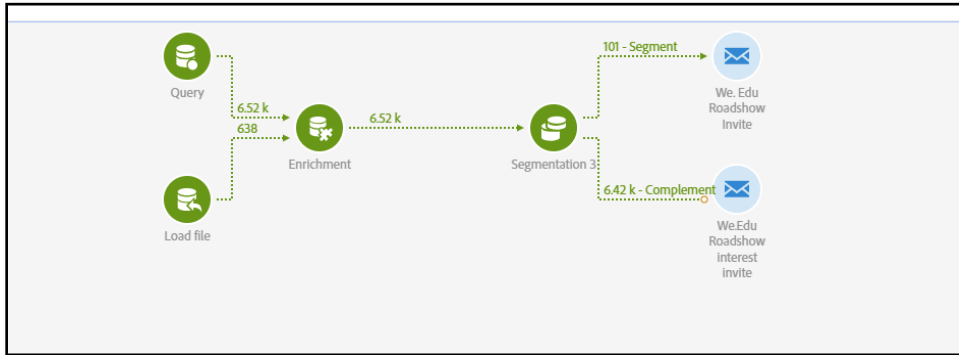
You can add personalization variable in subject line as well.

24. Click on **Save**.

25. Click on **Close**. Return to the delivery. For the other segment, we will create an email based on a template.

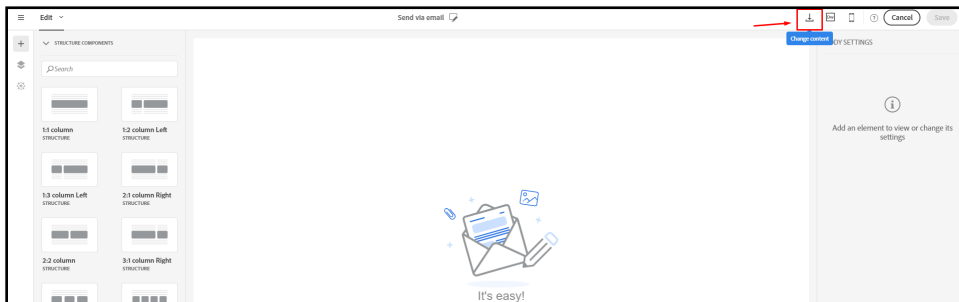
26. Let’s go back to the workflow again and drag drop email activity against the complement of segment.

This is the We. Edu Roadshow interest invite where we try to estimate the interest in our last event city.

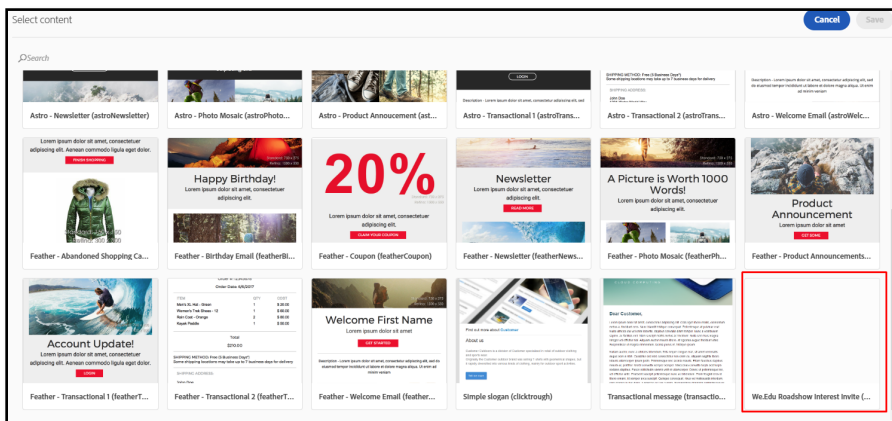


27. Edit the email activity and repeat steps to create a delivery

28. Once you arrive to Email Designer, click on **Change content** button

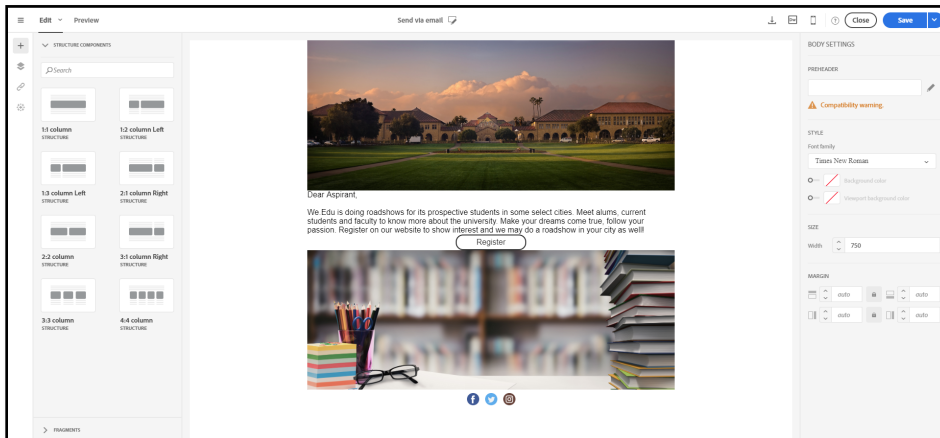


29. You will see multiple email templates. For this session we are going to use We.edu template. Scroll down to see - *We.edu roadshow interest invite*

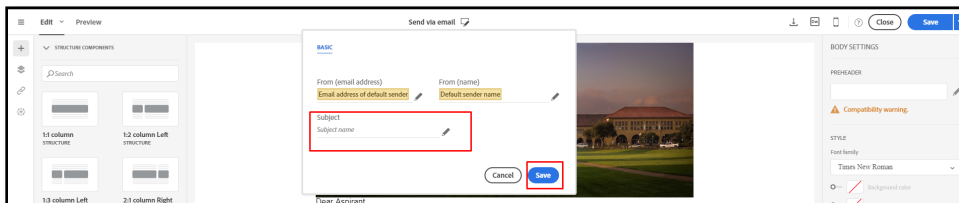




30. Once you open the template, personalize it with additional text, images, etc.

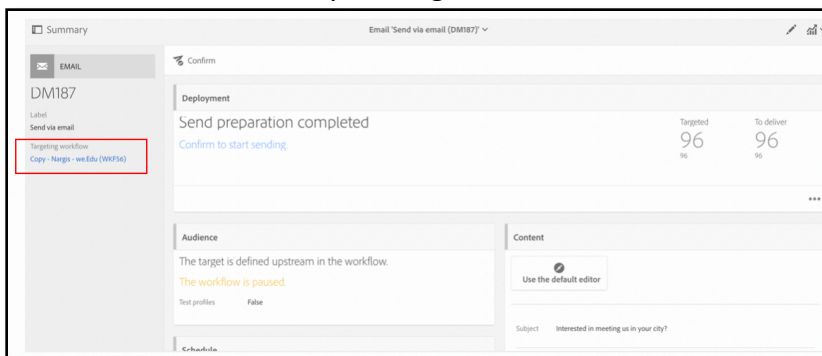


31. Add a subject line *“Interested in meeting us in your city?”*



32. **Save and Close.**

33. Return to the workflow by clicking on the Workflow link



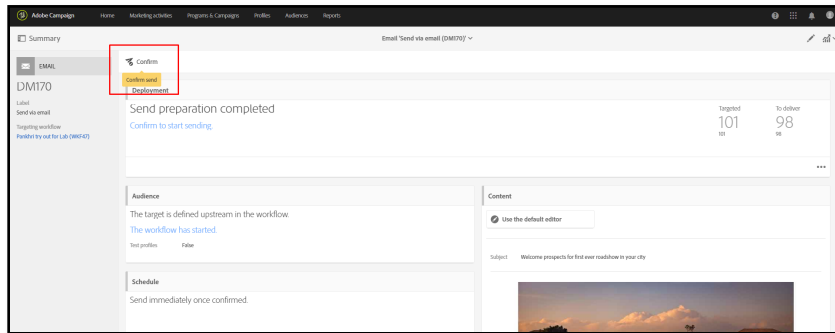
34. Start the workflow

---

*Note, the emails will not be sent at this point.*

---

## 35. Confirm both the email deliveries after starting the workflow



## Lesson 7 – Build custom reports to analyze city engagement data

### Objective

In this lesson, you will learn to use dynamic reporting workspace and build your own custom report to analyze city engagement data.

### Lesson Context

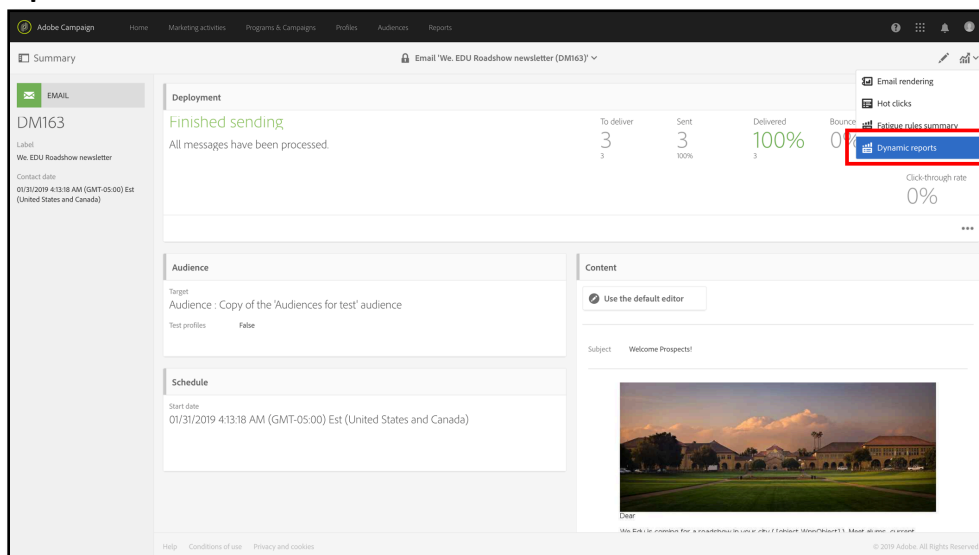
There are 2 ways to access reports:

- From the home page by selecting Reports tab in the top bar or the Reports card to access reports for all deliveries.
- In each program, campaign, and message, from the Reports button by clicking Dynamic Reports to only view the reports specific to the delivery.

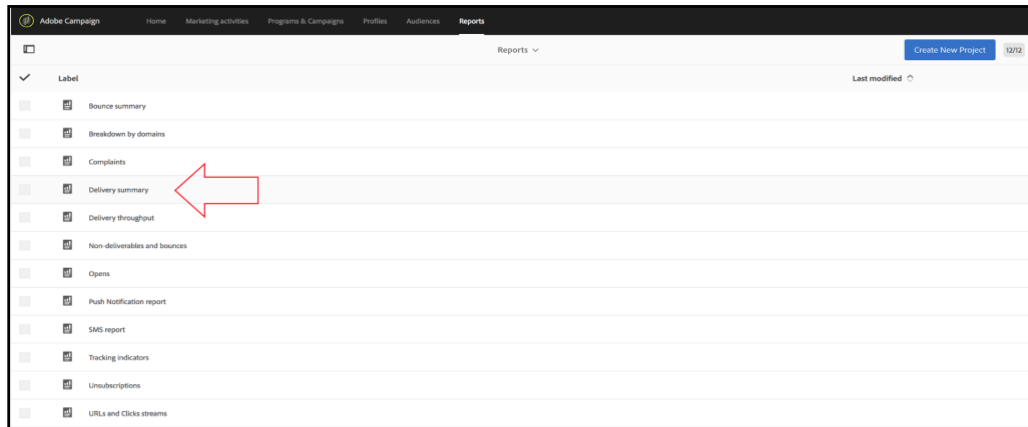
**In our case, we will use the second because we want to report on a specific message.**

### Exercise

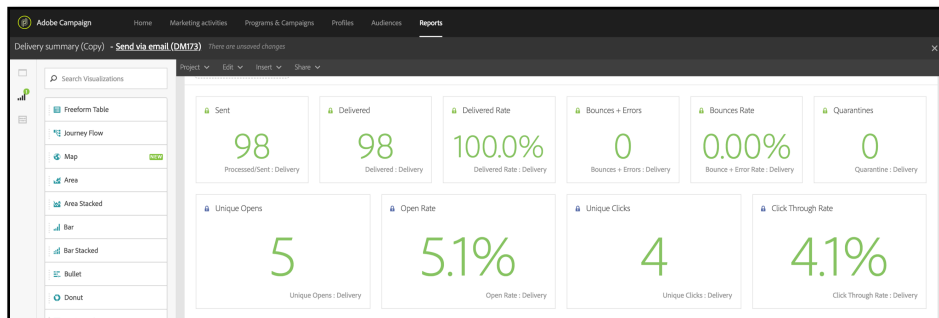
1. From the first message sent (Segment 1), click the **report icon** then select **Dynamic reports**




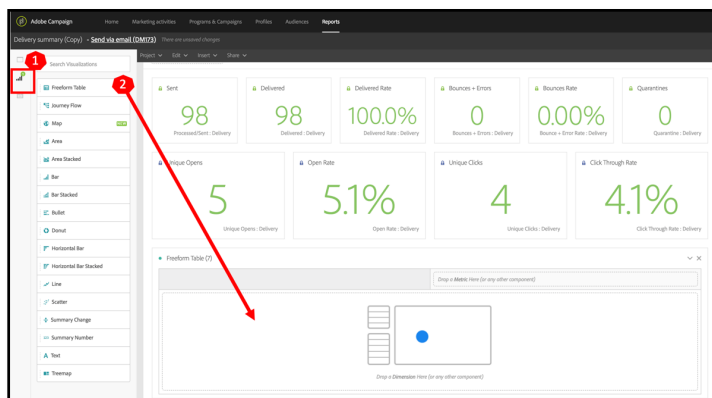
- From the out of the box reports list, click **Delivery summary** report.



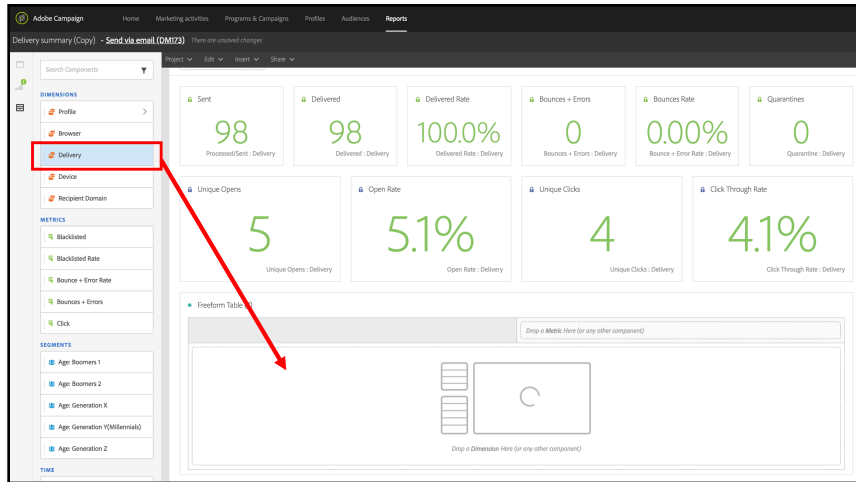
- At the top of the report, KPIs gives you a high-level view of your campaign effectiveness however, it does not tell you what the level of city engagement is. So, how can you get deeper insights from this report?



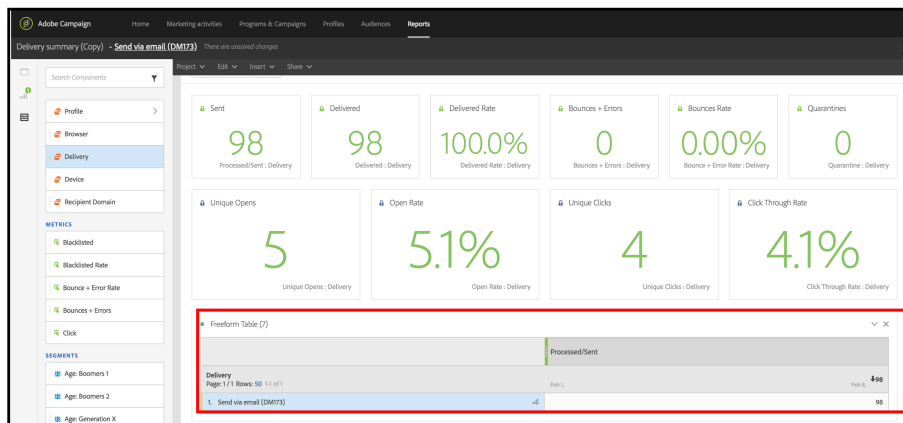
- To get deeper insights, you will create a new freeform table that allows you breakdown the analysis by city. From the left rail, click Visualizations icon  and drag and drop a new freeform table below the KPIs.



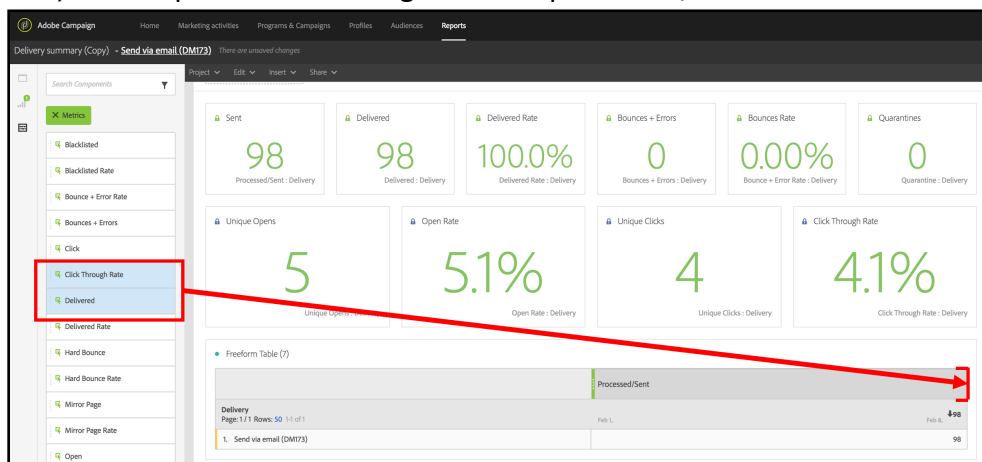
- From the left rail, click **Dimensions** component, select **Delivery**, drag and drop into the new freeform table.



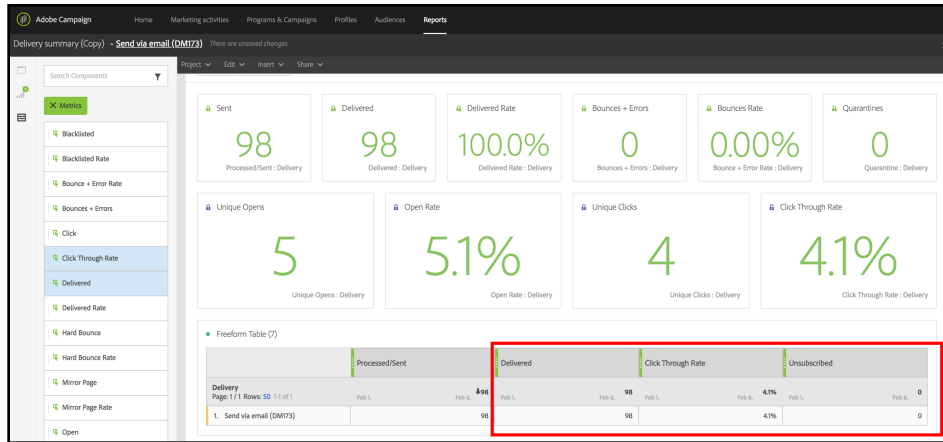
Result:



- From the left rail, click **Metrics** component, select multiple metrics by using 'Ctrl' or 'cmd' + click on each metric (**Delivered**, **Open rate**, **Click-through rate** and **unsubscribe rate**) and drop into the table right next to processed/sent metric.

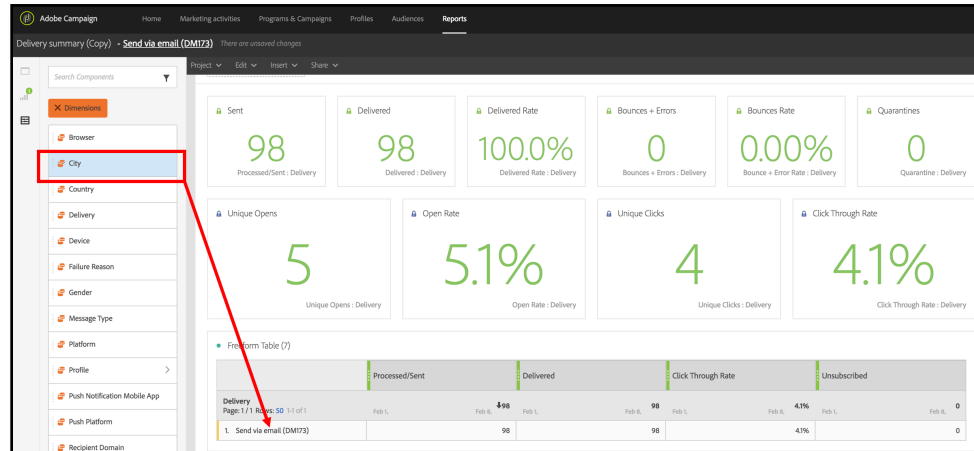


Result expected

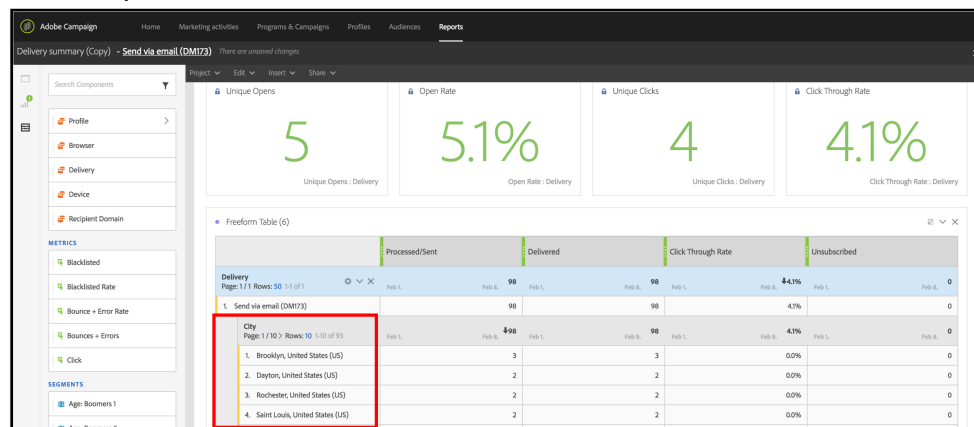


7. Now, breakdown the delivery dimension by city.

- a. From the lefttrail, click **Dimensions**, drag and drop **City** dimension into the 'delivery' cell.



b. Result expected:



- From the **Click-through Rate** column, click on the arrow to **sort** the result-set in descending order and show the most engaged cities.

The screenshot shows the Adobe Campaign Reports interface. The summary dashboard displays key metrics: Processed/Sent (98), Delivered (98), Delivered Rate (100.0%), Bounces + Errors (0), Bounce + Error Rate (0.00%), and Quarantine (0). Below this, four cards show Unique Opens (5), Open Rate (5.1%), Unique Clicks (4), and Click Through Rate (4.1%).

The 'Freeform Table (7)' below shows a table with columns: Processed/Sent, Delivered, Click Through Rate, and Unsubscribed. The table is sorted by Click Through Rate in descending order. The first row is 'Send via email (DM173)' with a 4.3% rate. The second row is 'City' with a 4.41% rate, highlighted with a red box. The table lists four cities: Boca Raton, United States (US) with 100.00%, Evanston, United States (US) with 100.00%, Iowa City, United States (US) with 100.00%, and San Jose, United States (US) with 100.00%.

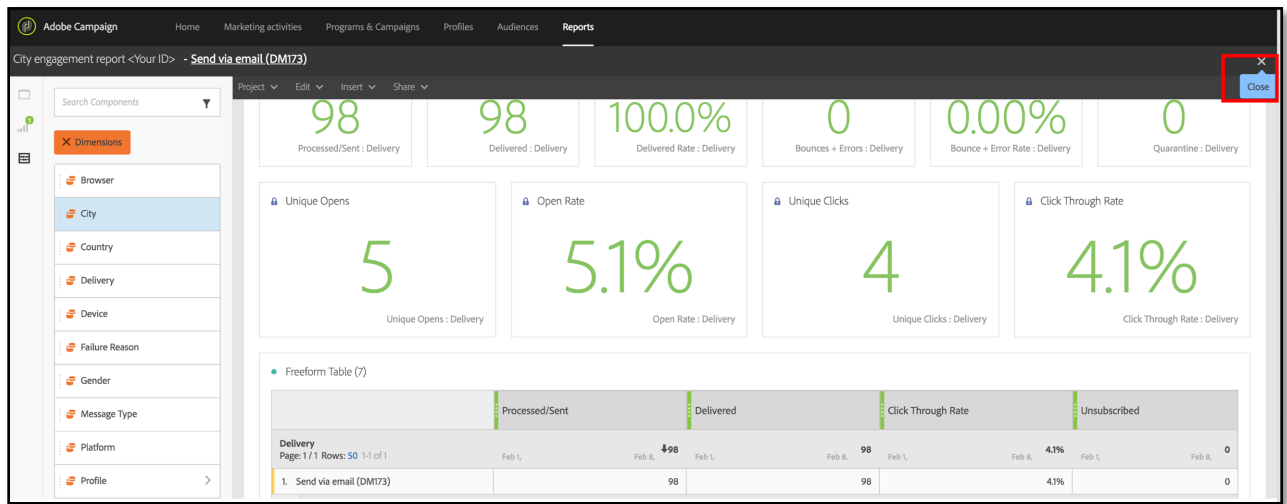
- Congratulations! Now, save your custom report by clicking on **Project > Saves As...**

The screenshot shows the Adobe Campaign Reports interface with the 'Project > Saves As...' menu open. The menu options include: Open, Save, Save As..., Refresh Project, Download CSV, and Print. The background dashboard shows the same metrics as the previous screenshot, but the 'Click Through Rate' is now 4.3%.

- Enter the report label: **“City engagement report <Your ID>”** then click **Save Project As**

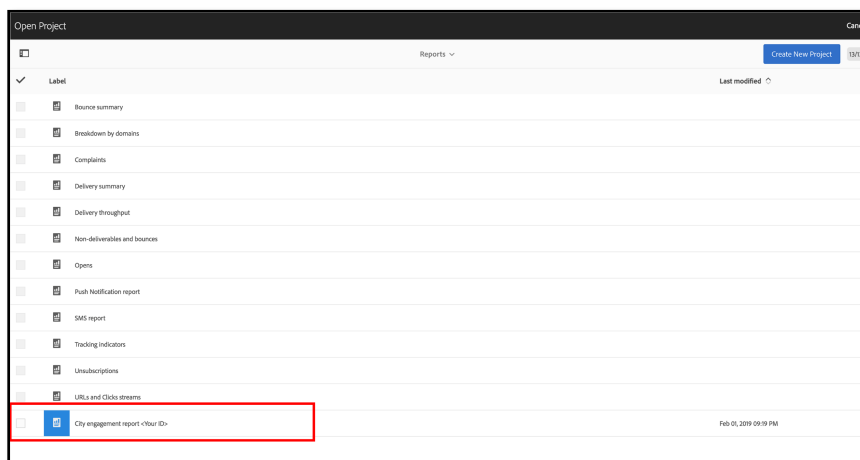
The screenshot shows the 'New Project' dialog box. It has a title bar 'New Project' with a close button. Below the title bar, there are two input fields: 'PROJECT NAME' with the text 'City engagement report <Your ID>' and 'PROJECT DESCRIPTION' with the text 'Project Description'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Save Project As'.

## 11. Close the report



## 12. Retrieve it in the report list.

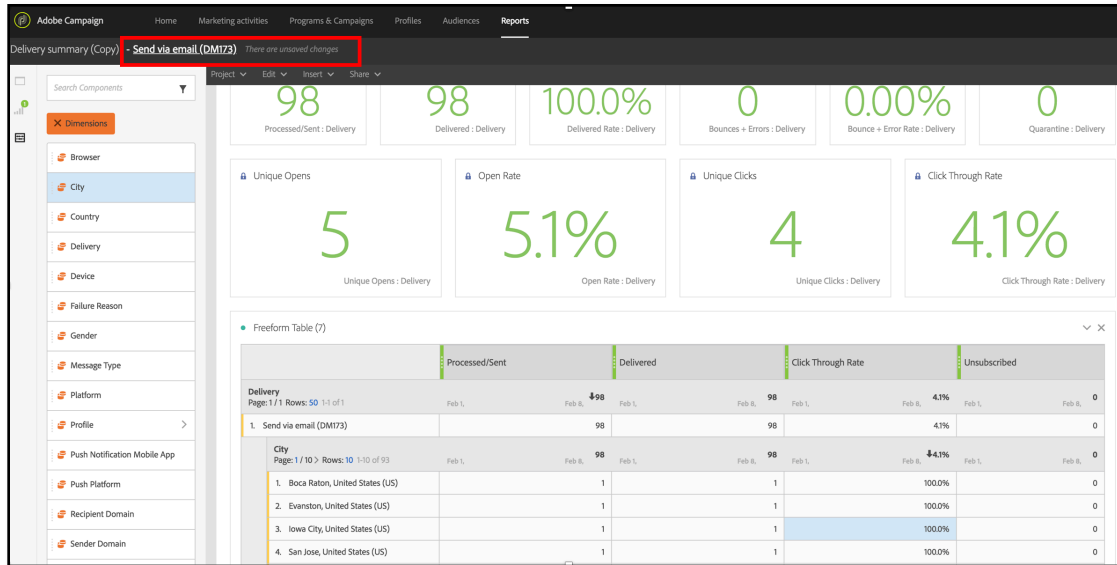
*You just created a report template that can be used to report on any other messages.*



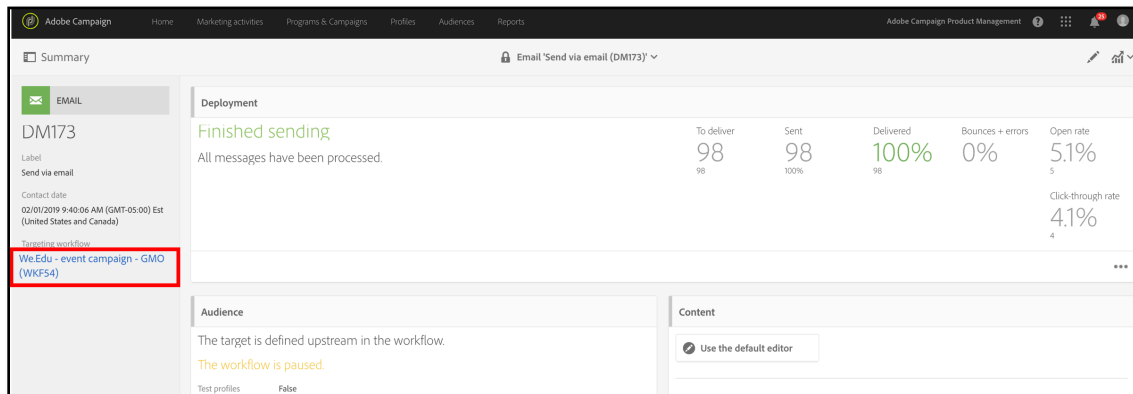
## 13. Now, let's look at the second email you sent from the workflow by using the report (template) you just saved.

From the report list, click on your custom report "city engagement report <Your ID>" then in the report click on the email link.

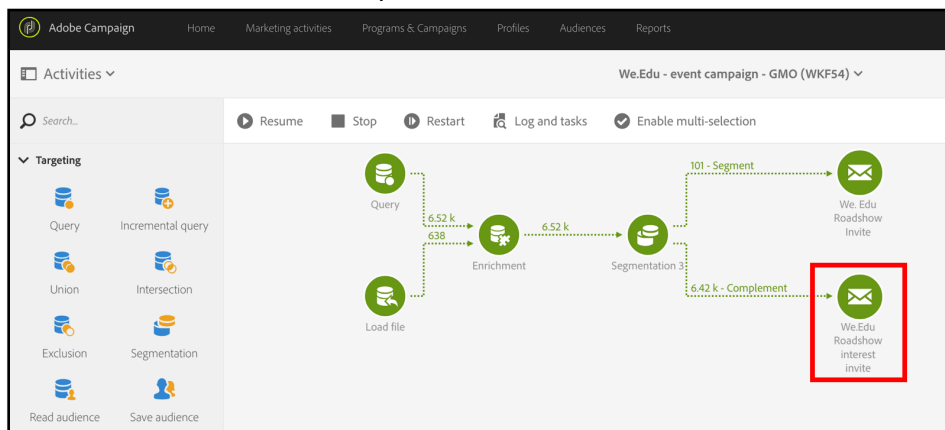




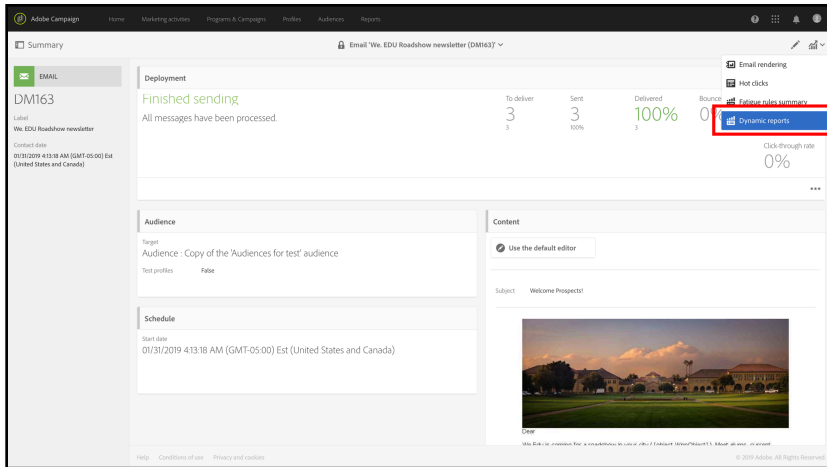
14. From the email dashboard, click on the **workflow link**



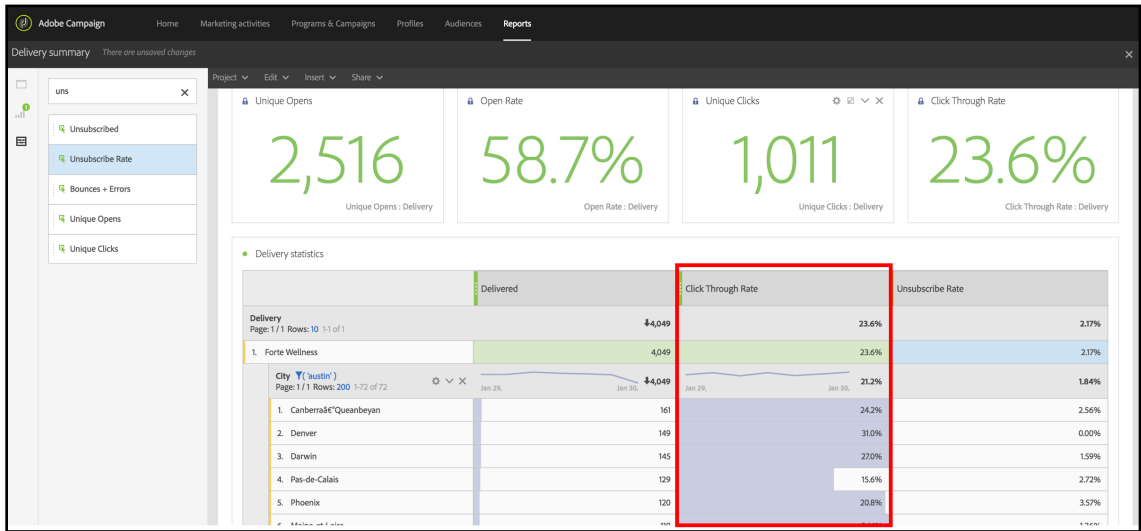
15. From the workflow canvas, open the **second email**



16. Go to dynamic reporting.



17. Select your custom report and you will see which city perform the best.



## Appendix – Challenge yourself by hyper-automating your campaigns

### Objective

Learn how to hyper-automate your workflows by leveraging **incremental query** activity with a **scheduler**.

### Lesson Context

The team has conducted a number of outreach activities that resulted in additional subscribers to their email list as well as additional high engagement campaigns after the original email was sent. They would like to avoid sending an email to recipients who could have already received an email, but essentially they would like to send an invitation to Local events for all new subscribers.

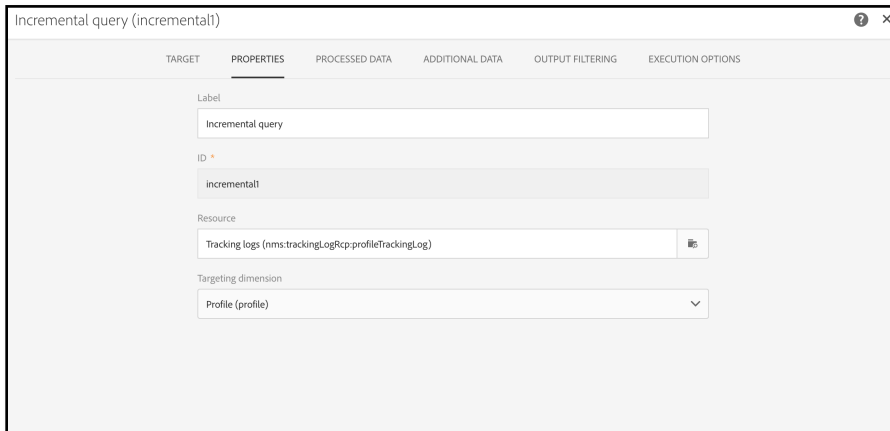
### Exercise

1. Drag and drop **Incremental query** activity

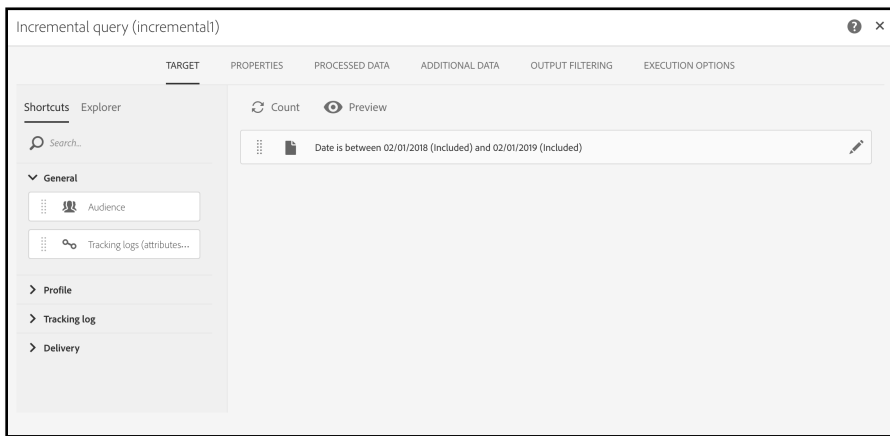


Next, we'll pretty much repeat the steps we took to configure **Query** activity in **Lesson 2**

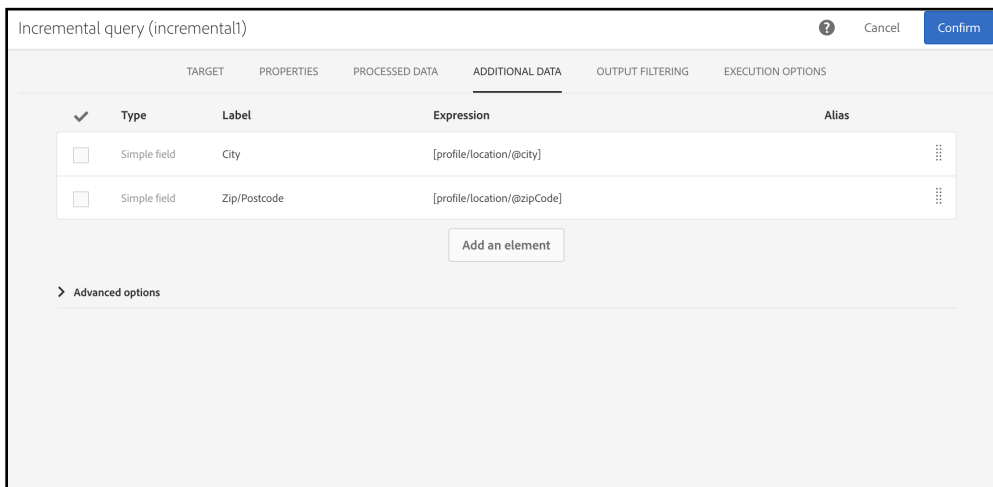
## 2. Switch the Resource to Tracking Logs



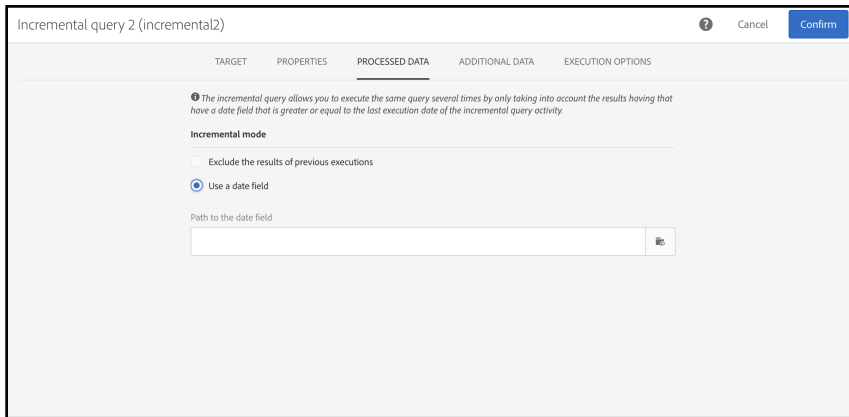
## 3. Select the date range as before



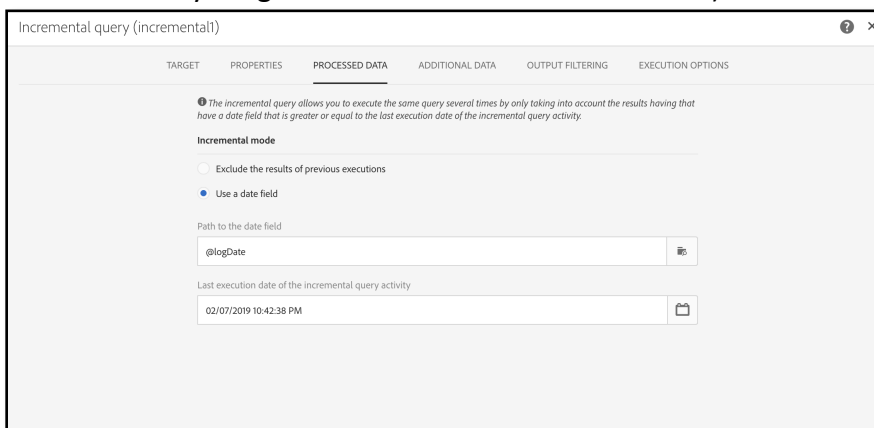
## 4. In **Additional Data** tab add **City** and **Zipcode**



5. Navigate to **Processed Data** tab, check **Use date field** and select **@logdate**

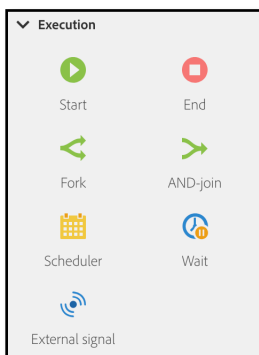


6. Run the activity once, you will see a new field **Last execution date of the incremental activity**, now manually reset it to right before you started collecting new emails (this date can be anything 1 week before or a month before).

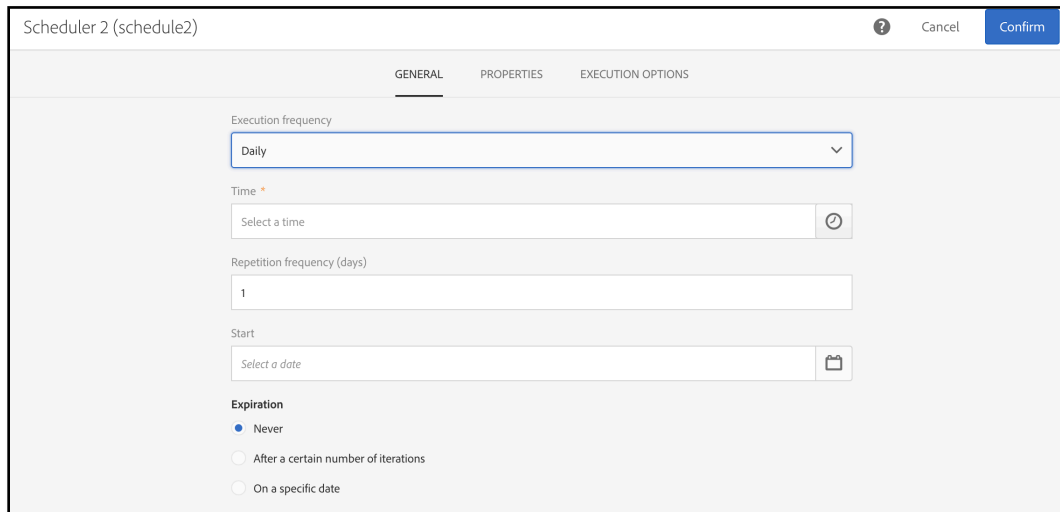


This date will always show the last execution of your incremental query. Therefore, when the incremental query is executed again it will only pick up profiles who have new tracking logs.

7. From the **Channels activities** pick **Scheduler** activity



8. Configure the scheduler to execute as many times a day or a week as you like by specifying parameters in the **General** tab



Scheduler 2 (schedule2) [?] Cancel Confirm

GENERAL PROPERTIES EXECUTION OPTIONS

Execution frequency  
Daily

Time \*  
Select a time

Repetition frequency (days)  
1

Start  
Select a date

Expiration  
 Never  
 After a certain number of iterations  
 On a specific date

Make sure to specify that the activity should be expired after a certain date, otherwise it will continue executing.

---

*Note: if you are planning to run this workflow more than once you should select a recurring delivery in the delivery type selection, rather than a one-time delivery.*

---

## Additional Resources

---

*Additional resources available at [adobe.com/go/summit2019-l759](https://adobe.com/go/summit2019-l759)*

---