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Product Manager*

How to Automate your Quality Assurance and Data Validation for IBM Campaign and IBM Interact



Agenda

- Introductions
- Challenges of IBM Campaign & Interact Quality Assurance
- Importance of Quality Assurance
- What is campaignQA?
- Questions

An aerial photograph of a city skyline, likely Pittsburgh, showing various skyscrapers and buildings. A large blue rectangular box is overlaid on the right side of the image, containing the text "Who am I?".

Who am I?

Brad Penwarden

- Product Development Manager
- 30+ Unica Engagements
- 8-years of EMM Experience:
 - Solutions Consultant
 - System Architect
 - Software Developer



An aerial photograph of a city skyline, likely Pittsburgh, showing various skyscrapers and buildings. A large blue rectangular overlay is positioned in the center-right of the image, containing white text. The text reads "IBM Campaign & Interact QA Challenges".

IBM Campaign & Interact QA Challenges

Common EMM QA Challenges

1. IBM Campaign Abstraction

- *The devil is in the details....*

2. Event Driven Campaigns

- *On demand QA*

3. Inbound Marketing

- *“Always on” QA*
- *Volume*

IBM Campaign Abstractions – Table Mappings

The image shows three overlapping dialog boxes for configuring table mappings in IBM Campaign. The leftmost dialog, titled "New table definition: Specify fields for the new table", shows the source table "DBO.INDIVSM_RETAIL" and a list of fields with their types. The middle dialog, titled "New table definition: Specify the selected table's audience level and assign ID field(s) to it.", shows the audience level set to "Individual" and "INDIV_ID (Numeric)" as the selected audience field. The rightmost dialog, titled "New table definition: Specify the dimension table's key field(s)", shows "SEGMENTID (Numeric)" as the key field(s). Red boxes highlight specific configuration options: a checked checkbox for "This audience level is normalized in this table", an unchecked checkbox for "Key field(s) are normalized in this table", and a dropdown menu for "Table join method" set to "Auto".

New table definition: Specify fields for the new table

Source table: DBO.INDIVSM_RETAIL

Source table fields:

Field name	Field type
INDIV_ID	Numeric
HHOLD_ID	Numeric
SEGMENT	Text
RFM_DECILE	Numeric
STORE_TRADE_A...	Text
MODEL_SCORE1	Numeric
MODEL_SCORE2	Numeric
MODEL_SCORE3	Numeric
FLAG1	Text
FLAG2	Text
FLAG3	Text

New table definition: Specify the selected table's audience level and assign ID field(s) to it.

Audience level: Individual

Audience fields:

- INDIV_ID (Numeric)

This audience level is normalized in this table

New table definition: Specify the dimension table's key field(s).

Key field(s):

- SEGMENTID (Numeric)

< Click here to add new item >

Key field(s) are normalized in this table

Table join method: Auto

Buttons: Back, Next, Cancel, Help

Abstractions – Template Library

The screenshot displays the IBM Campaign interface with two overlapping dialog boxes. The background window shows a campaign named 'SOLA_26OCT2016 (C000000011) - BFC01 - Wil Video'. The 'Stored templates' dialog box is open, showing a 'Full name:' field with 'CHRHTESTING' and an 'Items list' containing 'SetUserVars'. The 'Table mappings' dialog box is also open, displaying a table of mappings.

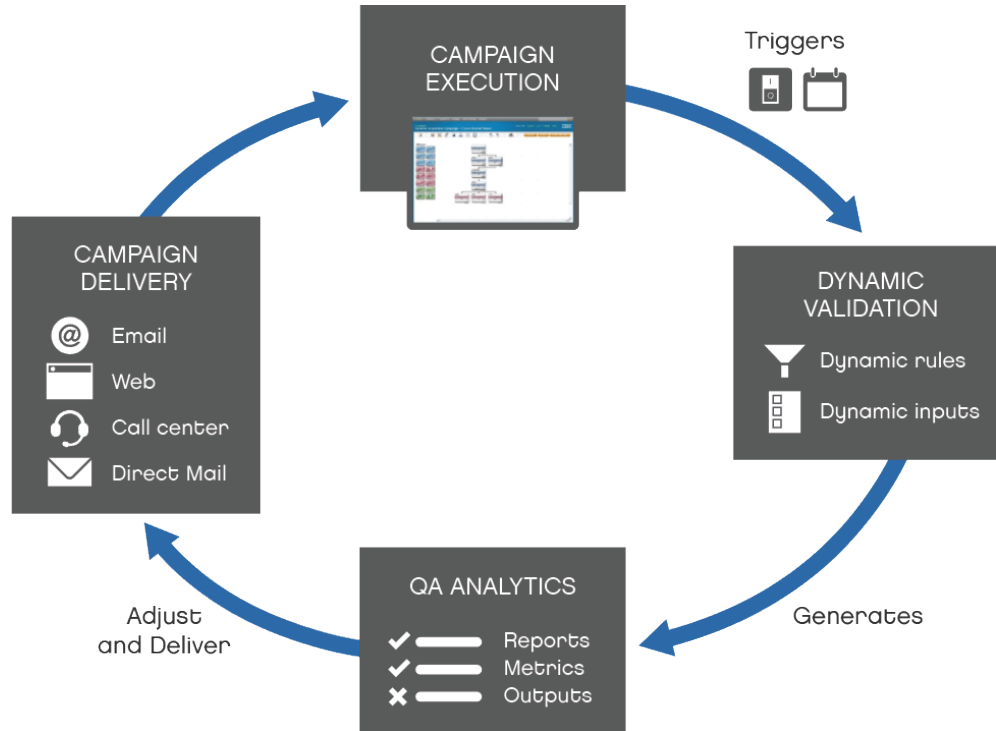
User table name	Type	Audience	ID field(s)	# Records	Data source
BAS_DBO_INDIV	Base Record Table	Individual	INDIV_ID	60725	[DBO] DBO_INDIV
CAMPAGN_UA_...	Base Record Table	Subscription	SUBSCRIPTION_ID	5	[UA_SYSTABLES]
CAMPAGN_UA_...	Base Record Table	Subscription	SUBSCRIPTIONID	2	[UA_SYSTABLES]
UA_ACTIONSUS...	Base Record Table	Subscription	SUBSCRIPTIONID	14	[UA_SYSTABLES]
UA_SUBACTION...	Base Record Table	Subscription	SUBSCRIPTIONID	1	[UA_SYSTABLES]
DBO_INDIV_DEM	Dimension Table		INDIV_ID		[DBO] DBO_INDIV
DBO_DBO_ACCT	Dimension Table		INDIV_ID		[DBO] DBO_ACCT

Abstractions – SQL Assumptions

The screenshot shows a software interface with a tree view on the left containing folders like 'reports', 'validation', 'audienceLevels', 'Optimize', 'dataSources', 'systemTableMapping', and 'server'. The main area displays 'Settings for 'dataProcessing'' with the option 'longNumericIdsAsText' set to 'FALSE'. A diagram is overlaid on the interface, illustrating a data flow and processing step:

- On the left, two data sources are shown: 'Mail list' (containing 7,078 records) and 'Snapshot'.
- Arrows from these sources point to a central blue box representing a query result: '<Customer ID>'. The results listed are:
 - 123
 - ...
 - **132**
 - **132**
- Two blue rectangular boxes are positioned between the data sources and the query result box.
- A bracket on the right side of the query result box groups the two '132' entries, with the label 'Duplicates' next to it.
- The text 'Select **Distinct**

Event Driven Campaigns

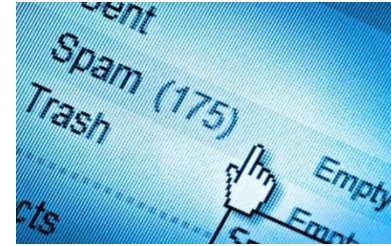


An aerial photograph of a city skyline, likely Pittsburgh, showing various skyscrapers and buildings. A large blue rectangular overlay is positioned in the center-right of the image, containing the text "Why is QA important?".

Why is QA important?

Business Impacts

- Customer Perception
 - Reputation Degradation
 - Customer Confusion
- Financial Implications
 - Fines
 - Time to Market
- QA Management Complexity
 - More systems
 - More/varied data and sources
 - New sources of error
 - Campaign Production Stress



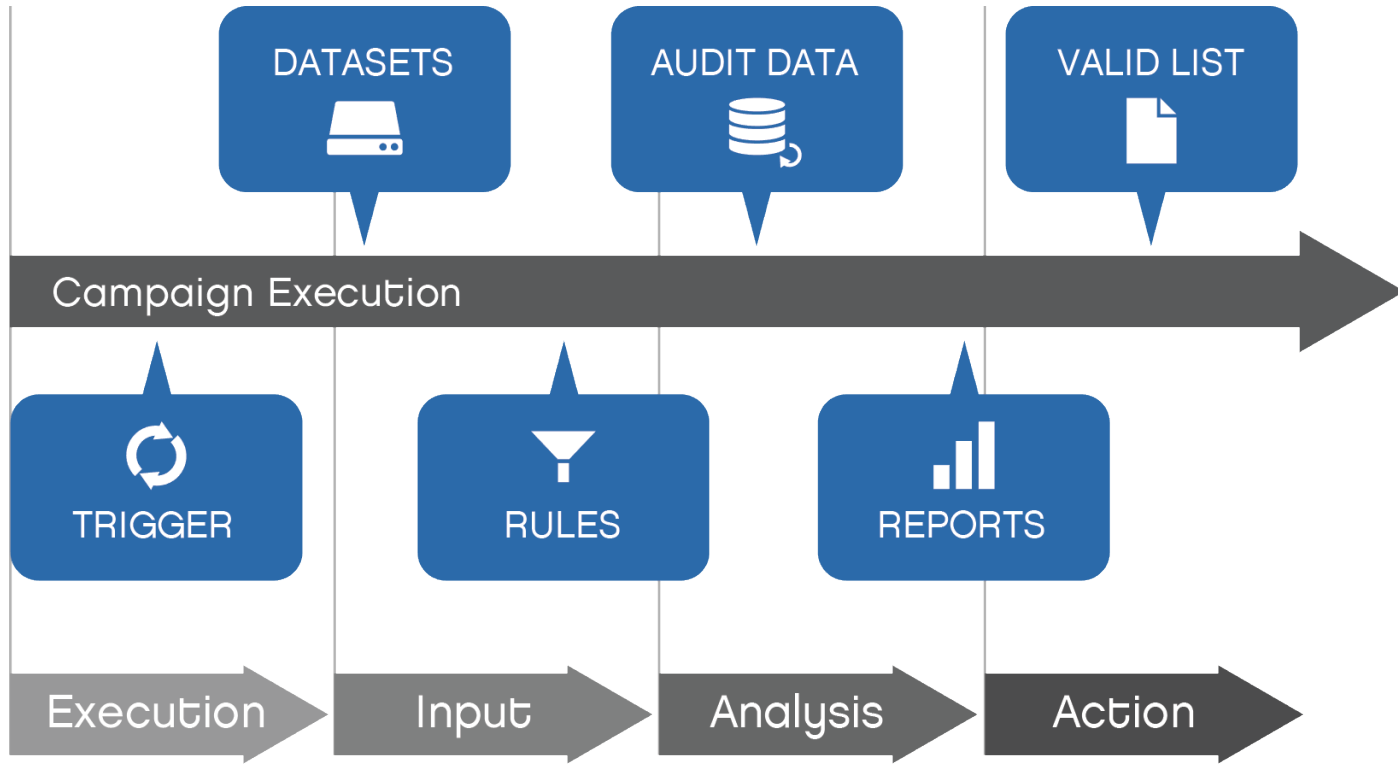
An aerial photograph of a city skyline, likely Pittsburgh, showing various skyscrapers and buildings. A large blue rectangular overlay is positioned in the center-right of the image, containing the title text in white. The background shows a mix of modern high-rise buildings and older, more traditional structures, with a river visible in the distance.

What is campaignQA

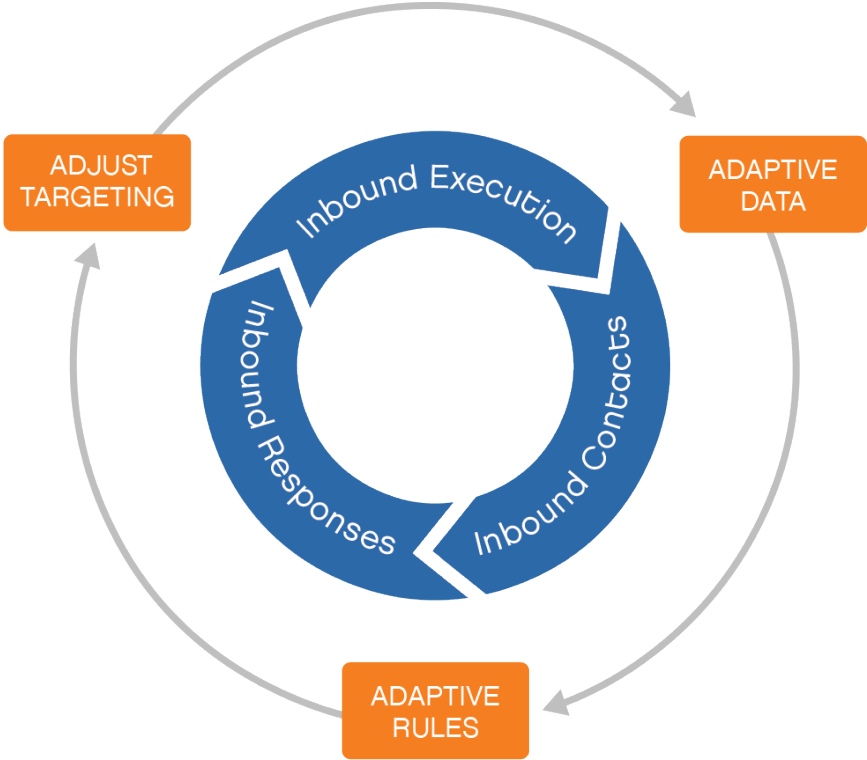
Client Spectrum campaignQA

- Validates data against user-defined rules.
- Corrects lists based on rules.
- Reports on QA results for investigation and analysis.

How does it execute with Outbound?



What about Inbound?



An aerial photograph of a city skyline, likely Pittsburgh, showing various skyscrapers and buildings. A large blue rectangular overlay is positioned in the center-right of the image, containing the word "Demonstration" in white text. The background shows a mix of modern high-rise buildings and older, lower-rise structures, with a river visible in the distance.

Demonstration

campaignQA

1. Using campaignQA from with your Outbound flowcharts
2. Using campaignQA with your Inbound flowcharts

Automating QA Process - campaignQA

Dataset wizard

Dataset Name: Video_list

Dataset Type: []

Connection: []

Use Regex:

Source Name: []

Cache Data: []

Cache Duration: []

Columns

Ruleset wizard

Name: Allowed_Contacts

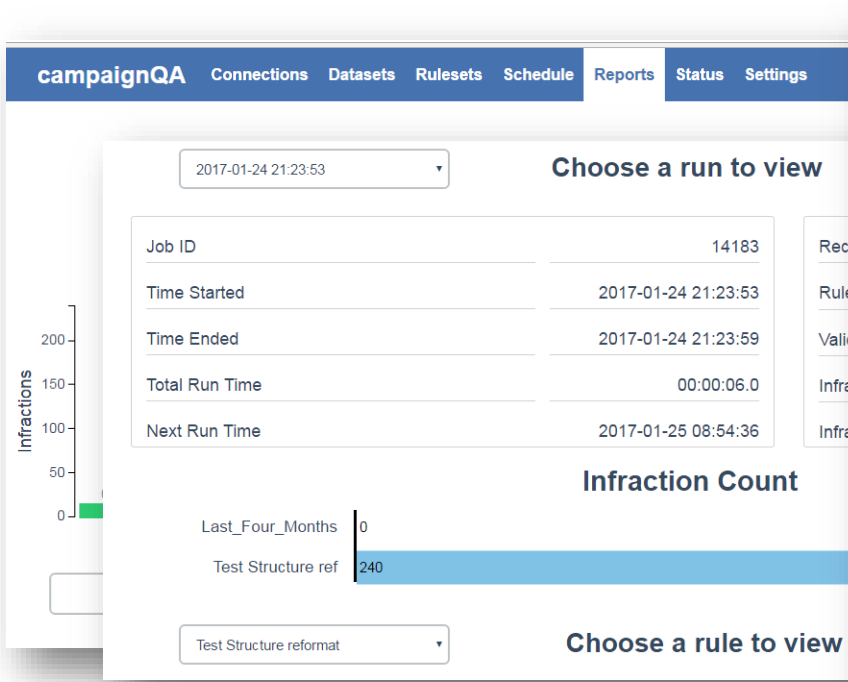
Dataset: Video_list

Rules

Name	Rule Type
Emailable	value
Global_Opt_Out_Check	value

Buttons: Test Dataset, Find Columns, Add Rule, Delete, Save Changes, Cancel

campaignQA – Data Analysis



Rule: Test Structure reformat

Download Results

Search...

QA_ID	PO_ID	PLN_ID	RECOMMENDED_PD_INCREASE_PERCEN	ANNUAL_BASE_PAY_AMT_2	PAYROLL_FREQUENCY_E
123	72873425	30055843	0.08	86917	HZANCYORU
124	22848798	95444292	-0.03	468795	HVPPJHZJU
125	66385159	30889182	0.53	940506	MULMNCMWS
126	32476782	18839407	0.96	66238	YTVMYQNR0
128	74494018	64570098	0.29	980634	ZLHZKXZC
129	69980117	64823954	-0.92	734358	KFRCRIMMF
130	46080881	43371137	-0.97	411272	RPCNGJILC
131	10278221	82539761	0.18	994991	WXGEDEKAQ
132	72388335	93257915	0.03	234544	SBVICRCEQ
133	60896191	6791030	-0.88	513333	QALZVOUZF

Navigation: << < 1 2 3 ... 24 > >>

Page: 1



Inbound campaignQA

campaignQA – Inbound Data

The image displays a composite of four overlapping screenshots from the campaignQA application interface.

- Dataset wizard:** Shows a configuration screen for a dataset. It includes a "Columns" section with a callout: "How do you compare the column against a value". Buttons for "Test Dataset" and "Find Columns" are visible.
- Statistics Rule:** A configuration window for a rule. Fields include "Rule Name" (Single Office Customer Segment), "Column" (IN), "Group By" (SE, ST, HE, HH), "Statistic" (co), "Operator" (les), "Value" (1), "Not" (checkbox), and "Severity" (Se). A "View SQL" button is at the bottom.
- Schedule wizard:** A configuration window for a schedule. Fields include "Name" (Interact Profile Test), "Ruleset" (Profile_Table_Con), "Dataset" (Sample_Interact_F), "Start Date" (2016-12-12 13:00:00), "End Date" (2020-06-10 03:55:00), "Frequency" (DAILY), and "Cron" (Cron). A "View Details" button is at the bottom.
- REPORTS:** A dashboard showing "Last 10 Runs" as a bar chart with all values at 0. A "Severity Totals" pie chart shows 0% for low, med, and high severity. A table below shows details for a specific run:

Field	Value
Job ID	14195
Time Started	2017-01-25 13:00:00
Time Ended	2017-01-25 13:00:24
Total Run Time	00:00:24.0
Next Run Time	2017-01-26 13:00:00

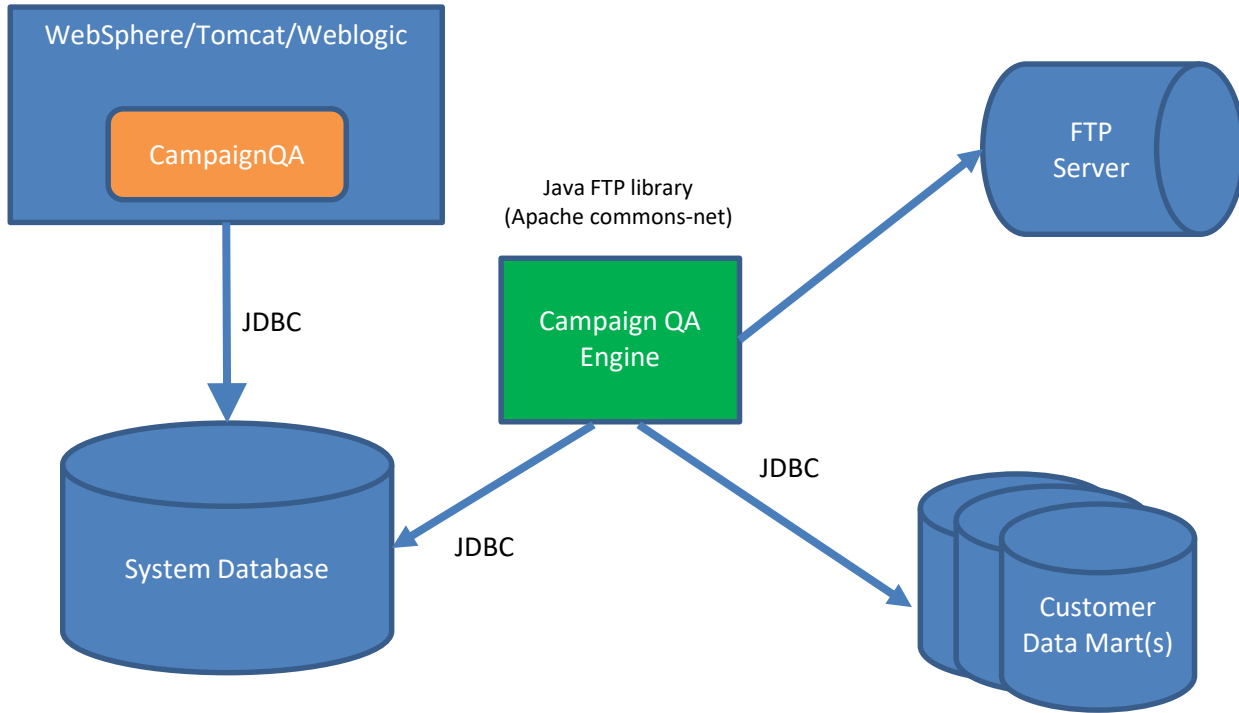
 A summary table on the right shows:

Records	20k
Rules	x 3
Validations	60k
Infractions	0
Infraction Rate	0.00%

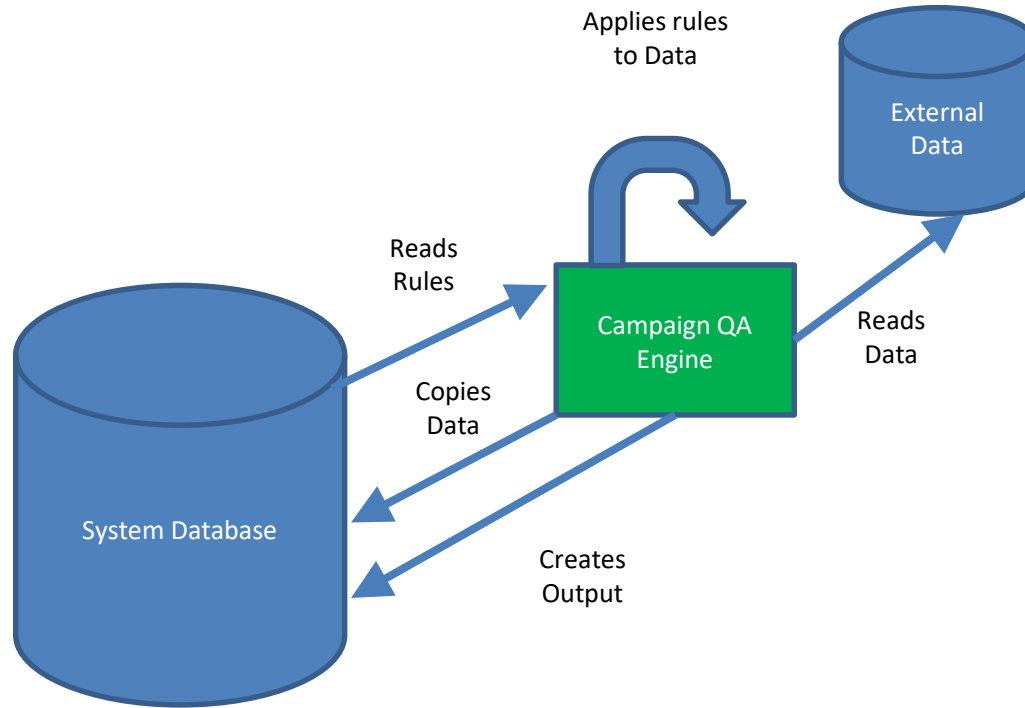


Back End Architecture

Architecture



Architecture



Thank You!

Any Questions?



More Questions?

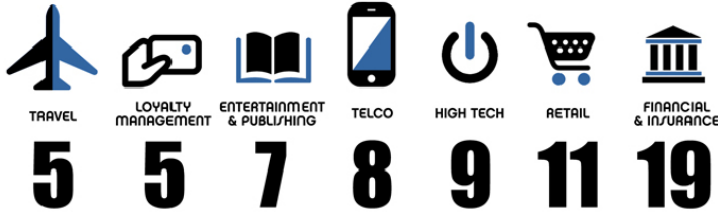
- We will be providing a follow up email 😊
- If you have any questions feel free to email us at sales@munvo.com



Who is Client Spectrum?

Client Spectrum Profile

EMM CLIENTS PER INDUSTRY



NUMBER OF EMM PROJECTS PER LOCATION

