# Oracle Responsys: Essentials Ed 1

Oracle Marketing

| DURATION | MODULES | COURSE CODE |
| --- | --- | --- |
| **3 Days** | **6 Lectures** | **—** |

## Course Overview

Whether you’re new to Oracle Responsys, or just looking to brush up on the basics, the Oracle Responsys (B2C) Essentials Series of courses is great way to get started. These courses teach you how to navigate and use the different functional areas of the Oracle Responsys platform, and include best practice tips along the way.

## What You Will Learn

- Table of
- Essentials of Navigation
- OnDemand Lab Access
- Overview
- Why Oracle Responsys?
- Responsys Campaign Workflow
- Oracle Responsys Navigation
- Logging In
- Responsys Home
- Feature Announcements
- Responsys Online Help
- Campaign Monitor on Home Screen
- Responsys Main Menu
- Actions Menu
- Campaigns Menu
- Manage Campaign Screen: List View
- Object Relationship Navigator
- Campaign Designer
- Push, In-App, and SMS Campaign Development Examples
- Campaign Objects stored in Folders
- Programs Menu
- Program Development and Production Life Cycle
- Program Designer Canvas
- Audiences Menu

- Audiences Menu: Filter Designer
- Manage Audiences and Audience Designer
- Main Menu>Data > Profile List
- Data Menu: Connect
- Responsys Data Objects
- Content Menu: Content Library
- Content Menu: Hosted Library
- Campaign Assets versus Campaign Objects
- Search Objects Functionality
- Forms Menu
- Folders
- Archiving: Account-Level Best Practices
- Insight Menu
- Tools Menu
- Account Settings
- Multiple Tabs or Browser Windows
- Enterprise Authorization for Users
- Summary & Resources
- Responsys Insiders Community
- Earn Recognition and Accreditation
- Table of
- Essentials of Data Sources
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of Data Sources
- Responsys Data Sources
- Data Sources
- Data Integration Methods
- Profile Lists
- Profile List
- List Composition
- System Fields for Identifying Subscribers
- Email Permission Status Field
- Email Deliverability Status Field
- Profile Lists View
- Lists Associations
- Lists
- Multiple Lists: B2B vs. B2C
- Profile Extension Tables
- Creating a Profile Extension Table via Specify Fields
- How a PET Works
- PET Use Cases
- PET Limitations
- Supplemental Tables
- Joining a Supplemental Table with Contacts List
- How a Contact List is Joined with a Supplemental Table: Example
- Supplemental Table Uses

- Creating a Supplemental Table
- Creating a Supplemental Table via Specify Fields
- Primary Key and Data Extraction Key
- Joining Tables Using DEK Keys
- Using Supplemental Tables for Targeting: Inclusions
- Using Supplemental Tables for Targeting: Exclusions
- Using Supplemental Tables for Inclusions and Exclusions
- Managing Supplemental Tables
- DEK Best Practices
- Supplemental Table Best Practices
- Supplemental Table: Best Practices
- Supplemental Table: Limitations
- Data Transfers with Responsys Connect
- Responsys Connect
- Creating Import Jobs
- Creating Export Jobs
- Creating Export Feed Data Jobs
- View Job Execution Logs
- Accessing File Server through Connect
- Online Help for Exporting Contact Event Data
- Summary & Resources
- Earn Recognition and Accreditation
- Oracle Cloud: Become Certified
- Services and Support
- Table of
- Essentials of Audience Designer
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of Audience Designer
- Overview
- Audience Designer for Targeting
- Audience Designer vs. Filter Designer
- CXAudience’s Approach to Segmentation
- Audience Designer Features
- Audiences Menu
- Manage Audience
- Steps to Create and Use an Audience
- Creating Simple Filters
- Different Types of Filters
- Simple Filters
- Profile Data Filters
- Email Behavior Filters
- Form Behavior Filters
- SMS Behavior Filters
- Web Behavior Filters
- Display Filters
- Other Filters

- Considerations When Designing Filters
- Viewing Filter Counts
- Save a Filter’s Result Set and De-dupe Records
- Using Result Set PET through Membership Attribute
- Viewing Load History
- De-dupe Records on App Channel Filters
- Use Filters for Inclusions, Exclusions, or Suppressions
- Source Table Name Tool Tip
- Creating a Simple Filter
- Configure Attribute Conditions
- String Data
- Dates
- Behavioral Action and Campaign, Program, or Form Objects
- Classic Filters (Legacy)
- Filter Designer: Best Practices
- Creating an Audience
- What Is an Audience?
- Create Audiences
- Audience Designer
- Developing an Audience Definition
- AND
- OR
- MINUS
- Final Audience
- Note
- Audience Designer Constraints
- Settings: General and Options
- Validate and Publish Audience
- Access Audiences via Folders
- Export an Audience
- Analyzing an Audience
- Run an Audience Analysis
- Troubleshooting
- Make Changes in Audience Design
- Using Filters or Audiences
- Using in Campaign or Program
- Campaign: Select Audience
- Campaign: Select Simple Filter(s)
- Program: Get an Audience
- Program: Scheduled Filter
- Program: Data Switch Uses Simple Filters
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- Essentials of Segment Groups
- OnDemand Lab Access
- Understanding List Segmentations
- Segment Groups
- Filters vs. Segments vs. Audiences
- Segment Groups Uses
- Segment Groups Added to Campaigns
- Segment Groups: Interactive Dashboards
- Create Segment Groups
- Create Segment Group Rules
- Create Rules Sets Using Operators
- Analyze Results
- Earn Recognition and Accreditation
- Oracle Cloud: Become Certified
- Services and Support
- Table of
- Essentials of Managing Content
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of Managing Content
- Content Library
- Campaign Content
- Where Does Responsys Store Campaign Content?
- Campaign Assets versus Campaign Objects
- Content Library
- Content Library: Manage Content Screen
- Personalizing Your View
- Individual File Actions
- Bulk Actions
- Create or Upload Content
- Creating HTML or Text Documents
- Create Document Screen
- Uploading Content
- Uploading Files
- Source Path Structure Must Match Content Library
- Preview and Edit Documents
- Previewing Documents
- Editing Document: Drop-Down Menu
- Editing Documents: Document Preview Screen
- Editing Documents: Quick View
- HTML Document
- HTML Document: Text Replacement
- HTML Document: Links
- HTML Documents: Images
- Image Reference in HTML
- Image Reference in HTML: Full Path
- Image Reference in HTML: Relative Path

- Hosted Content
- Hosted Content Pool
- Email Templates
- Creating Email Templates
- Visual Template Designer Functionality
- Saved Templates versus Sample Templates
- Saved Templates
- Visual Template Designer: Functional Roles
- Summary and Resources
- Earn Recognition and Accreditation
- Table of
- Introduction to RPL for Marketers
- What Is RPL?
- RPL and FreeMarker
- Dynamic Capabilities Enabled by RPL
- How to Write RPL?
- Where Can RPL be Used?
- Where RPL Can Be Used
- Encountering RPL in EMD
- Source Editor in EMD
- RPL in HTML (Contd...)
- RPL Components and Syntax
- RPL in SMS Campaign
- Noteworthy RPL Methods
- Facebookjoinus() RPL Method
- Clickthrough() RPL Method
- Track Clickthroughs without Anchor Tags
- Using Personalization Tokens
- Personalization Syntax
- Earn Recognition and Accreditation
- Table of
- Essentials of a Basic Email Campaign
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of a Basic Email Campaign
- Campaign Overview
- Integrated Campaign Experience Across Channels
- Launching Campaigns
- Responsys Campaign Creation Life Cycle
- Campaign Discovery Phase
- Email Campaign User Roles Required to Create Campaigns
- Campaign Creation via Campaign Designer
- Creating an Email Campaign
- Responsys Campaign Creation Life Cycle
- Steps to Create an Email Campaign
- Ways to Create an Email Campaign
- Email Message Designer (EMD) vs. Classic Campaigns

- Creating Campaigns from Classic Templates
- Creating a New Campaign
- Select Create Message in Campaign Designer
- Creating a Campaign from Saved Templates
- Create From File
- Selecting HTML and Text Asset for Campaign
- EMD Overview
- EMD Features
- EMD: Split-View and Source Editors
- EMD: Manage Header
- EMD: Version Test
- EMD: Creating/Personalizing Subject Line
- EMD: Content Widgets
- Content Widget Features
- EMD: Create Dynamic Regions Using Content Widgets
- EMD: Preview Campaign
- EMD: Message Preview and Debugging Output
- EMD: Setting Up Link Tracking
- Manage Campaigns Screen
- Export and Import Campaigns: Controlled Availability
- Link Tables and External Link Tracking
- Link Tracking
- How does Link Tracking work?
- Two Ways to Create Link Tables
- Generating a Link Table in EMD
- Link Table Anatomy
- Coding Links
- Create Link Table
- Create Link Table: Extract from Campaigns
- clickthrough() RPL Method
- Create Campaign: Best Practices for Link Tracking
- External Tracking
- External Links: The Analytics Big Picture
- External Tracking Link: Example
- Steps for External Link Tracking
- Admin Configuration: Technical Resource
- Setting Up External Link Tracking for a Campaign
- External Tracking: Campaign Level
- Configuring a Campaign
- Campaign Designer
- Object Relationship Navigator
- Email Message
- Data Sources
- Specify Data Sources
- Specify Additional Data Sources
- Add Supplemental Data Source

- Data Source Aliasing
- About Your Campaign
- Targeting
- Confirmed Opt-in for Subscribers
- Additional Settings
- Additional Settings: Campaign Settings and Tracking
- Additional Settings: Footer, Attachments, X-Headers, Auto-Close Options
- Additional Settings: Unsubscribe, Notifications, Throttle, Access Control
- Campaign Launch Notifications
- Preview and Test Options
- Preview the Campaign
- Test Links
- Deliverability
- Campaign Summary
- Proofing, Launching, and Analyzing a Campaign
- Proof, Launch, and Analyze
- Validate the Campaign
- Proof Launch
- Proof Launched Emails
- Launch Campaign: Once
- Launch Campaign: Immediately
- Launch Campaign: Recurring
- Launch: Schedule
- Don’t Panic! Cancel a Launch
- Best Practices: Campaign Live Launch
- Campaign Analysis via Campaign Designer
- Campaign Performance Metrics
- Live Report
- Overlay Report via Campaign Designer
- Overlay Report via Folders Screen
- Monitor Campaign: View Report
- Monitor Campaign: Pause, Resume, or Stop Launches
- Campaign Reporting with Interactive Dashboards
- Campaign Approval Workflow: Overview
- Request Approval
- Request Translation
- Summary and Resources
- Earn Recognition and Accreditation
- Table of
- Essentials of Dynamic Campaigns
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of Dynamic Campaigns
- Dynamic Content Campaigns
- What Is Dynamic Content Functionality?
- Think Modular, Dynamic, and Data Driven!
- Easy-to-Use Visual Tools

- Dynamic Content Components
- Dynamic Campaign Components
- Enabling Split-View Editor
- List
- Base HTML Creative
- Dynamic Content
- Rules
- Put It All Together for a Dynamic Campaign
- Creating a Dynamic Email Campaign
- Email Campaign Related Roles
- Creating a Dynamic Content Email Campaign
- Create a Dynamic Campaign: Enter Basic Information
- Creating a Campaign from New Templates
- EMD Overview for Dynamic Campaign Development
- Select Creative for Dynamic Campaign
- Selecting a Profile List
- Subject Line Personalization Using Token
- Using Dynamic Content Widget
- Dynamic Content Regions and Rules
- Dynamic Regions: Source View
- Default Rule
- Default Rule: Rules Editor
- Create New Rule and Define Data to Use
- Defining Rules Conditions
- Selecting Content
- Click-through and Preview Rules
- Dynamic Subject Line Using Widgets
- Save Rule Sets
- Rule Set Manager via Folder View
- Import Rule Sets
- Test in Preview
- Message Access Restrictions
- Summary & Resources
- Earn Recognition and Accreditation
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- Essentials of Program
- OnDemand Lab Access
- Agenda – Oracle Responsys: Essentials of Program
- Program Basics
- What Is Oracle Responsys Program?
- Designing a Program: Analyze Requirements
- Creating a Program: List Requirements
- Responsys Program: Solution Design Document
- Program Example: Welcome Program
- Program Example: Abandon Cart
- Programs in Production

- Cross-Channel Programs
- Channels
- Program Navigation
- Manage Programs
- Program Templates
- Program Designer Canvas
- Connecting Elements and Labeling Paths
- Aligning Path Lines
- Editing Toolbar: Program Development Cycle Screens
- Editing Toolbar: Other Features
- Element Properties
- Element Properties: Detailed View
- Creating a New Program
- Program Development
- Program Development and Production Life Cycle
- Designing a Program in Responsys
- Configure Program Settings
- Configure Program Settings: Example
- Designing a Program in Responsys
- Entry or Starting Events
- Entry or Starting Event: Get an Audience
- Entry or Starting Event: Scheduled Filter or View
- Customer Activated and Deactivated Events
- Entry or Starting Event: SMS Received Event
- Entry or Starting Event: Connect Event
- Entry or Starting Event: Custom Event
- Campaign Event: Send Email Campaign
- Check Email Campaigns
- Campaign Event: Send SMS or Push Campaigns
- Timer Event: Timer
- Throw and Catch
- End Event: Exit Program
- Holdout Group Element
- Switch Events: Business Logic
- Switch Events: Data Switch
- Switch Events: Allocation Switch
- Count Switch
- Allocation and Data Switch Example
- Validate, Promote, and Test Program
- Designing a Program in Responsys
- Validation
- Validation Complete
- Test Tab
- Testing
- Test Settings
- Test Options: Promote Draft, Test, Reset, and Stop

- Publish, Analyze, and Modify Program
- Designing a Program in Responsys
- Publish
- Analyze: Snapshot Tab
- Analyze: Monitor Tab
- Analyze: Performance Metrics Tab
- Program Reporting
- Managing Programs
- Summary View
- Modify a Program
- Modify: Unpublish
- Modify: Create a Draft and Republish
- Save As
- Terminate Program(s)
- Program Best Practices
- Summary & Resources
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- Oracle Cloud: Become Certified
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- Reporting with Interactive Dashboards
- OnDemand Lab Access
- Agenda – Oracle Responsys: Interactive Dashboards
- Overview
- Be Data Smart!
- Need for Advanced Reporting and Analytics
- Advanced Reporting and Analytics Capabilities
- Introduction to Interactive Dashboards
- What Is Interactive Dashboards?
- Interactive Dashboard: Functionalities
- Navigating to Interactive Dashboards
- Role-Based Privileges and Permissions
- Interactive Dashboards Common Terminology
- Navigating Interactive Dashboards
- Interactive Dashboards Home Page
- Navigational Interface: Key Sections
- Dashboard Tabs
- Smart Prompts
- Filters and Search Prompts
- Ad Hoc Prompts
- Drill-Downs
- Table Customization
- Navigational Interface: Global Header
- Main Dashboard
- Standard Reports
- Performance Trend Analysis Report

- Performance Trend Analysis Report: Navigation
- Campaign Exploration Report
- Performance by Marketing Strategy Report
- Performance by Campaign Purpose Report
- Performance by Device Report
- Analysis (Custom Reports)
- Performance: Campaign
- Campaign Performance Example
- Performance: Content
- Content Performance Example
- Performance: Link
- Link Performance Example
- Performance: Device
- Device Performance Example
- Performance: Segment
- Segment Performance Example
- Performance: Segment Group
- Segment Group Performance Example
- Performance: Multivariate Tests
- Multivariate Tests Example
- Performance: Account
- Performance: Organization
- Organization Performance Example
- Performance: Interval Analysis
- Interval Analysis Example
- Performance: Time Period Comparison
- Time Period Comparison Example
- Deliverability: Deliverability Trends
- Other Interactive Dashboards
- SMS and MMS Dashboard
- Mobile Apps Dashboard
- Web Push Dashboard
- Multi-Channel Dashboard
- List Analysis Dashboard
- Usage Dashboard
- Considerations While Using Usage Dashboard
- Working with Interactive Dashboards
- What Are Prompts?
- Prompts: Uses
- Interactive Graphs and Tables
- Interactive Graphs
- Common Interactive Graphs
- Working with Interactive Graphs
- Working with Interactive Tables
- Sorting
- Drill Down

- Regrouping
- Table-Level Prompts
- Section Filters
- Section Filters (Contd…)
- Interactive Dashboards Catalog
- Catalog Introduction
- Basic Catalog Search
- Full-Text Catalog Search
- Catalog: Folders, Tasks, and Search Panes
- Catalog: Toolbar
- Scheduling Reports using the Agent Editor
- Agent Editor: Overview of Steps
- Scheduling a New Report: Agent
- Agent Editor: Toolbar
- Agent Editor: General Tab
- Agent Editor: Schedule Tab
- Agent Editor: Delivery Content Tab (1/3)
- Agent Editor: Delivery Content Tab (2/3)
- Agent Editor: Delivery Content Tab (3/3)
- Agent Editor: Recipients Tab
- Agent Editor: Save the Schedule
- Agent Editor: Run the Schedule
- Creating Agents from Saved Analysis
- Recency-Frequency-Monetary Analysis
- What Is RFM?
- RFM Terminology
- RFM Dashboard
- RFM Prebuilt Filters and PETs
- RFM for Personalization, Targeting, and Reporting
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- Resources
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