Fonctionnalités Web

Technical Documentation

Adobe Campaign v6.1

Adobe Campaign

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Neolane, an Adobe Company
18 rue Roger Simon Barboux, 94110 Arcueil - France
+33 1 41 98 35 35
www.adobe.com

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CHAPTER 1

Introduction

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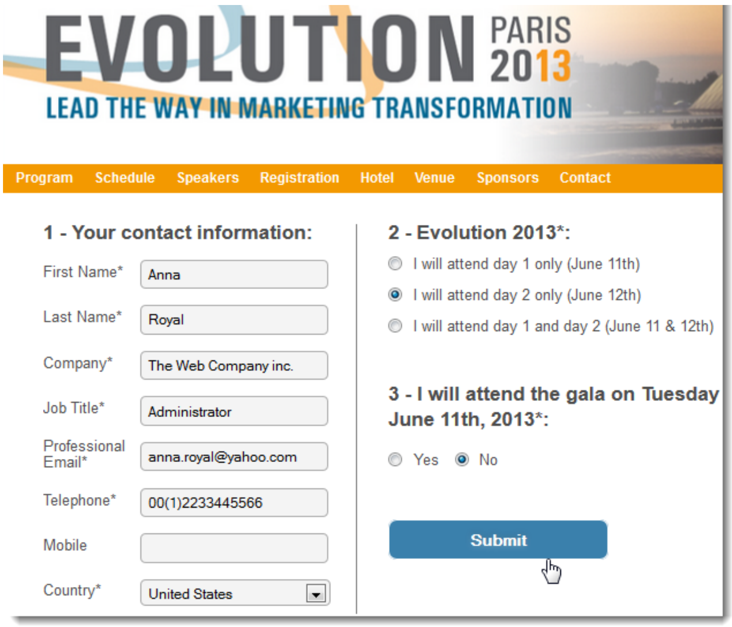
General operation

Adobe Campaign lets you create dynamic and interactive web applications with data from the database and content adapted to the rights of the connected user.

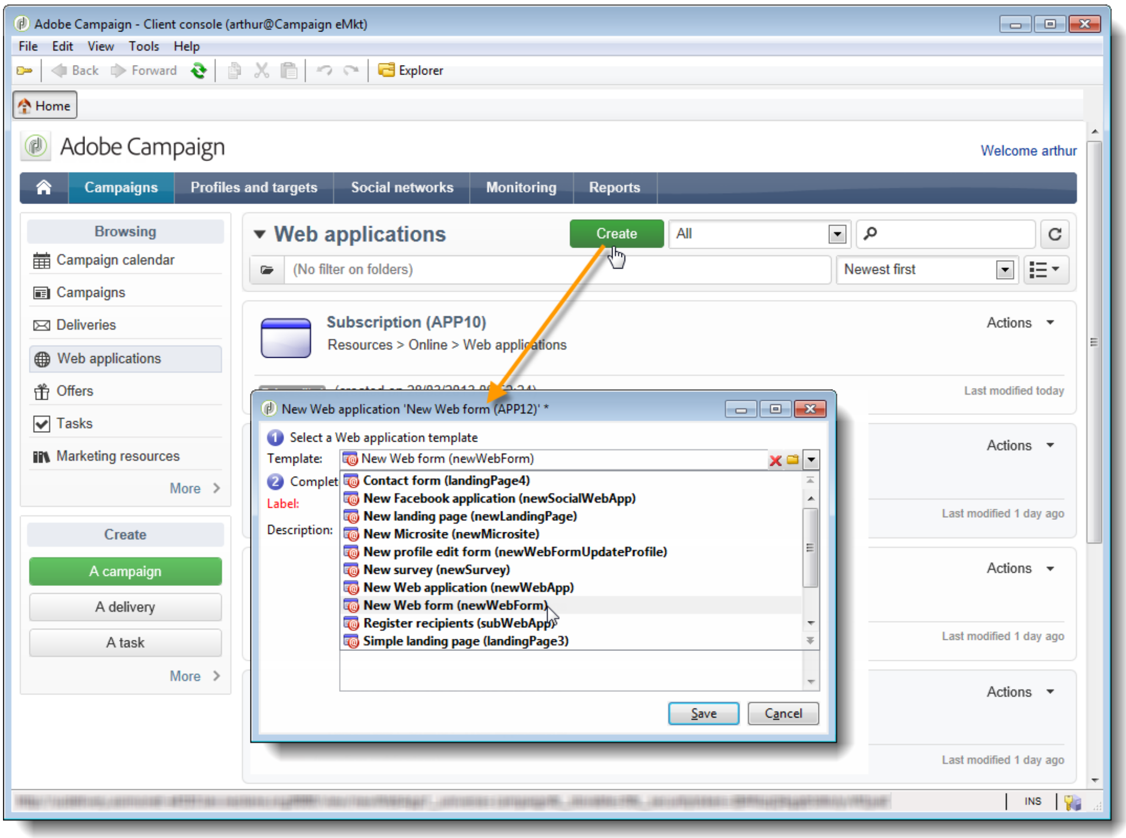
This can be a subscription form containing data that has been preloaded with information contained in the Adobe Campaign database, as shown below:



Creating a Web application

Web application types are selected during creation.

Go to the **Campaigns** universe and select the **Web Applications** menu. Click the **Create** button. Select the Web application template you want to use:



This template determines the type of Web Application. You can create:

1. Web forms (+ profile modification)

   Web forms enable you to offer Web pages with input or selection fields: the information entered by users can be stored in the Adobe Campaign database. For more on this, refer to Web forms.

2. Web Applications

   Adobe Campaign lets you create Web applications to be exposed on a Web platform or an extranet for instance. This enables you to edit data and record information in Adobe Campaign. In this case, you can restrict their access to authenticated users (via access control) and set up data preloading based on various criteria. For more on this, refer to Web applications.

3. Landing pages

   A landing page is an HTML page whose content is available on a Website and which enables users to enter information to be stored in the Adobe Campaign database profile. The content of this type of page is usually created by a specialized Web agency before being imported into Adobe Campaign for publication, management and follow-up. For more on this, refer to Creating a landing page [page 28].

4. Surveys

   Adobe Campaign enables you, via the **Survey Manager** option, to design and manage online surveys and process their results: dynamic field creation, score management, export of answers and dedicated reports. For more on this, refer to Online surveys.

⚠ Warning:

Survey Manager is an optional Adobe Campaign module. Please check your license agreement.

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5 Microsites

Adobe Campaign enables you, via the **Microsites** option, to create personalized Web pages accessible via a specific URL that includes personalization information.

Warning:

Microsites is an optional Adobe Campaign module. Please check your license agreement.

6 Facebook applications

Thanks to the **Social Marketing** option, Adobe Campaign lets you publish personalized content in a Facebook application. For more on this, refer to the Social Marketing guide.

Warning:

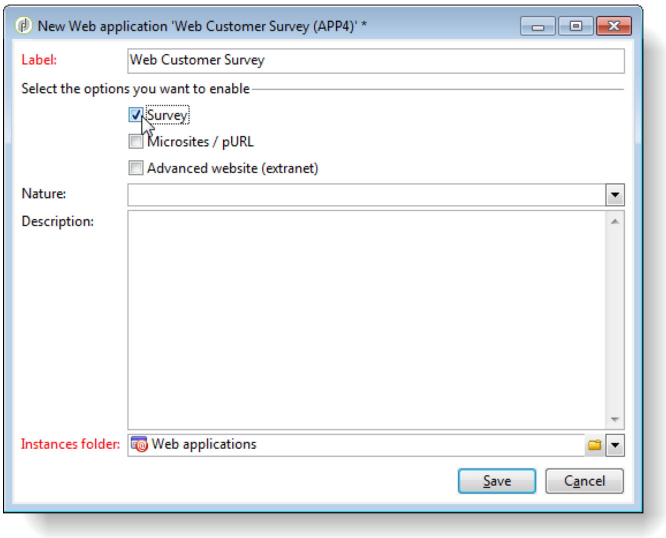
Social Marketing is an optional Adobe Campaign module. Please check your license agreement.

The page configuration mode as well as available configurations can be identical for several Web application types. For more on this, refer to Web forms.

Web Application templates

By default, Adobe Campaign provides one template per available Web Application. You can create new templates via the **Resources** > **Templates** > **Web Application templates** node of the Adobe Campaign tree.

The creation wizard lets you select the options you want to enable, as shown below.



Warning:

The available applications depend on your options and modules. Please check your license agreement.

CHAPTER 2

Editing HTML content

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Overview

The **Digital Content Editor (DCE)** is an HTML content editor that lets you easily create or modify templates or content in HTML format within Adobe Campaign.

The Digital Content Editor allows you to insert and format page elements and associate database fields with elements of an HTML page. It is offered by default when creating a page for a Web application, or available when creating deliveries based on a template in which it is active.

Note:

The DCE only allows you to carry out the operations detailed in this section.

If you would like to add server side JavaScript code, it is better to add it in personalization blocks. For more information on creating and modifying personalization blocks, refer to the Adding personalization blocks section.

General operation

This section presents the main steps to edit and upload content edited with the DCE within the framework of a Web application and in the context of a delivery.

The general operation is as follows:

To create a Web application, the steps are as follows:

- Creating a 'Landing page' type Web application, for more on this, refer to Creating a Web application [page 8],
- Selecting existing content or creating content from a standard template, for more on this, refer to Template management [page 13],
- Editing and configuring online content, for more on this, refer to Creating content [page 13],
- Publishing the Web application, for more on this, refer to Step 3: Publishing content [page 37] and Managing delivery and tracking [page 116].

Note:

For a complete example detailing the implementation of the DCE within the framework of a Web application, refer to Creating a landing page [page 28].

To create an email delivery, the steps are as follows:

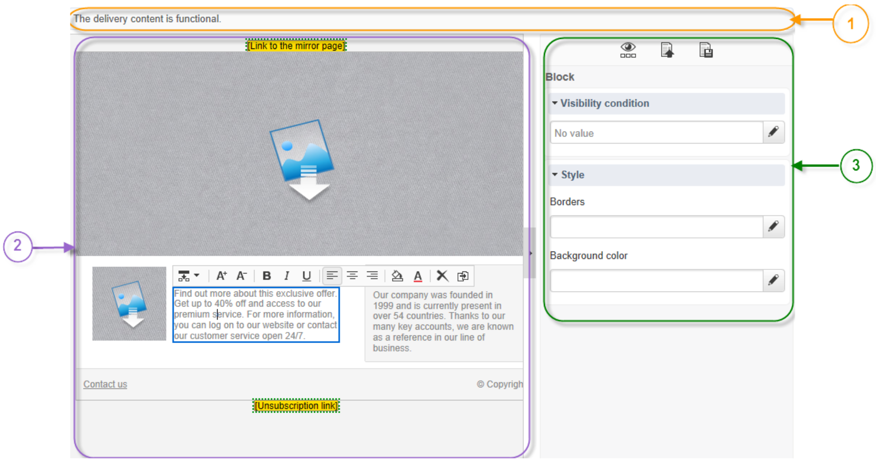
- Creating a delivery from an email type template in which the DCE is active,
- Selecting existing content or creating content from a standard template,
- Editing and configuring online content,
- Sending the delivery, for more on this refer to the Delivery guide.

Note:

For a complete example detailing the implementation of the DCE within the framework of an email delivery, refer to Delivering with the DCE [page 38].

Creating content

The DCE editing window is broken down into three different sections. They let you view, modify and check the state of the content.



1 The **top** section is a display area for messages to the user. These messages indicate the status of the Web application status or the delivery being created as well as warnings and error messages related to the content. For more on this, refer to Information messages and error messages [page 25].

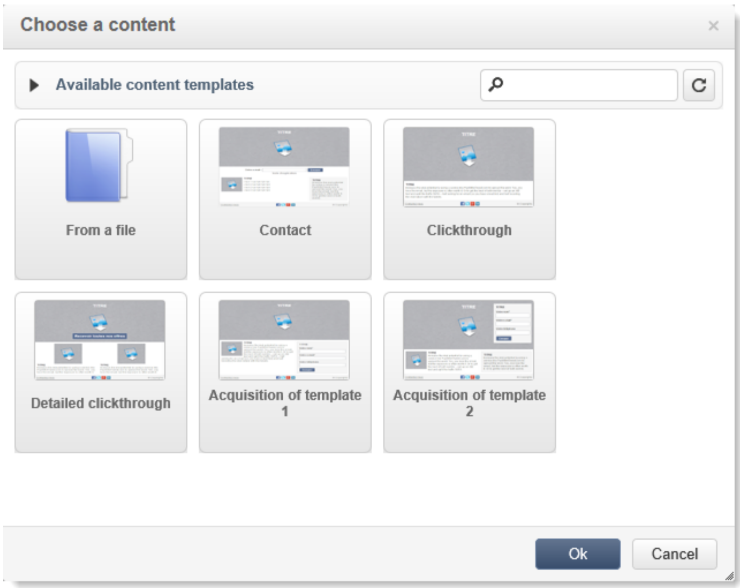
2 The section to the **left** of the window is the area for editing content. From this area, the user can directly interact with the content using the pop-up toolbar: insert a link into an image, change the font, delete a field, etc. For more on this refer to Using the toolbar [page 20].

3 The section to the **right** of the window is the control panel area. This area groups the different options for the editor, particularly those related to configuring the page heading and general options for a block: add a border, link a database field with an input zone, access Web page properties, etc. For more on this, refer to the Global options [page 14] and Block management [page 16] sections.

Template management

The Digital Content Editor offers **standard templates** for Web applications and deliveries.

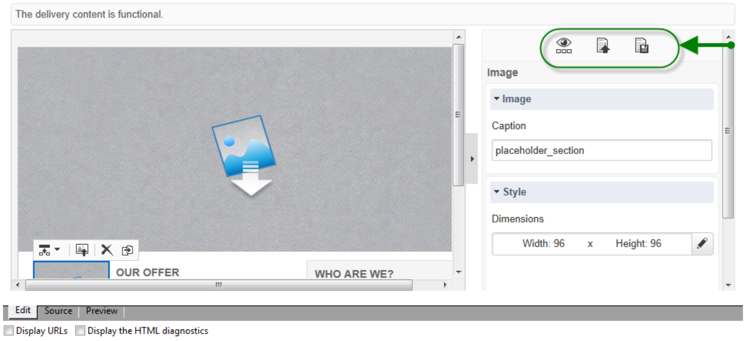
When creating a Landing Page type Web application, the user can choose one of these templates. You may also import an HTML template created outside of Adobe Campaign.



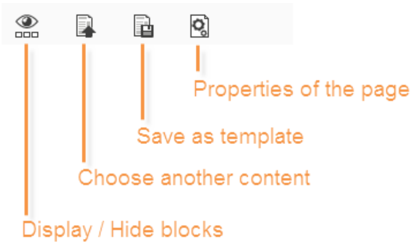
To add a template, refer to Global options [page 14].

Global options

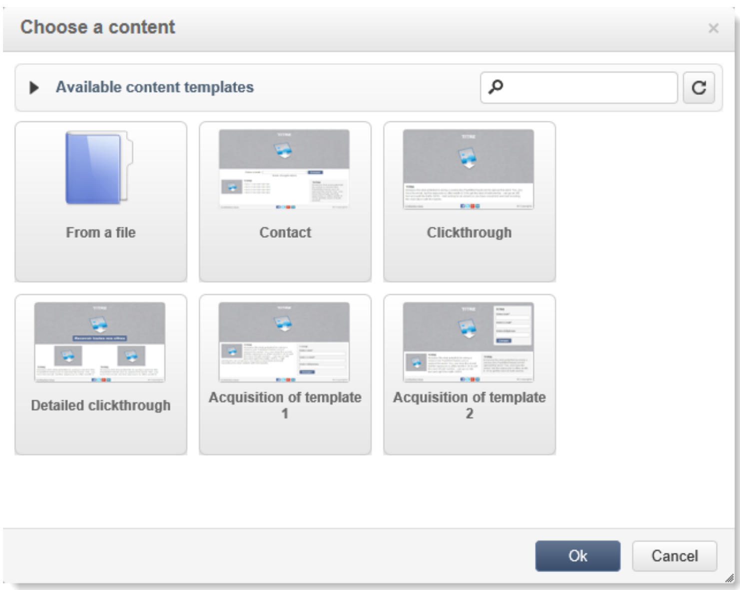
The top right section of the editor lets you access global options allowing you to control the content currently being created.



It has four icons:

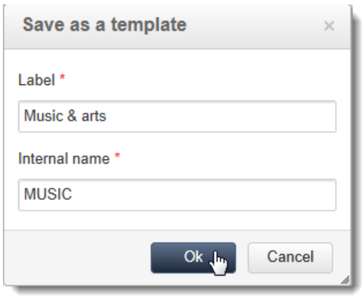


- The **Display/Hide blocks** icon lets you display blue frames around the content blocks (corresponding to the **<div>** HTML tag).
- The **Choose another content** icon lets the user load new content from a template (existing template or out-of-the-box template).

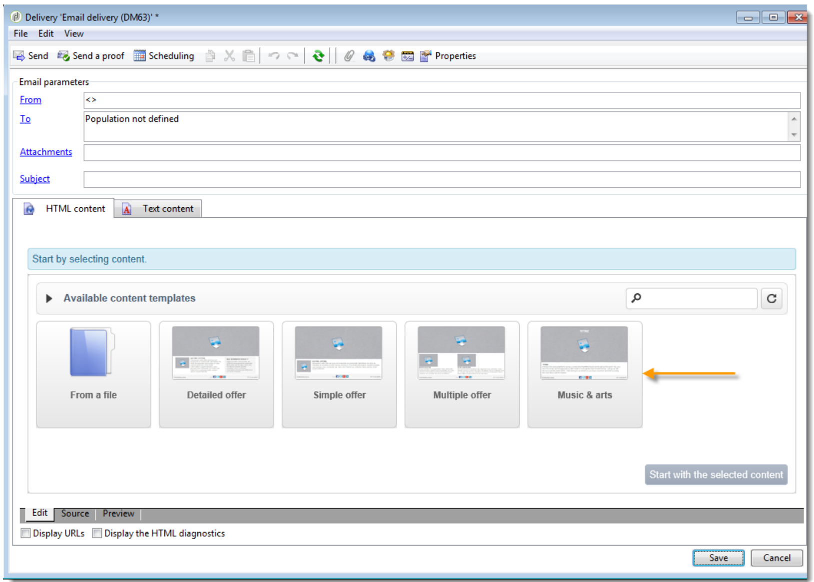


> **Warning:**
> The selected content replaces the current content.

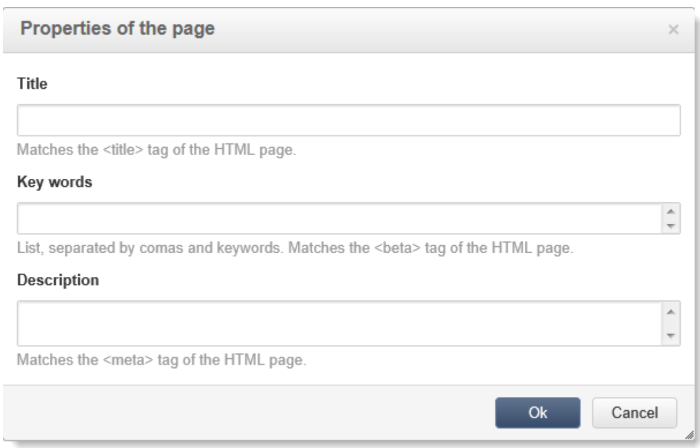
- The **Save as template** icon lets you save the current content as a template. You must enter the label and internal name for the template. Templates are stored in the **Resources** > **Templates** > **Content models** node.



Once saved, the template is available and can be selected when creating new content.



- The **Page properties** icon lets you select content information at the top of the HTML page.



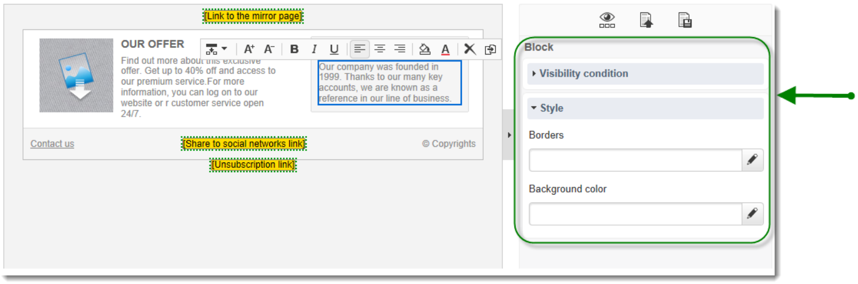
Note:

This information corresponds to the **<title>** and **<meta>** HTML tags on the page.

The key words must be separated by commas.

Block management

The section to the right of the editor groups the main options which allow you to act upon the content. To display these options, you must select a block: the nature of these options depends on the block selected.



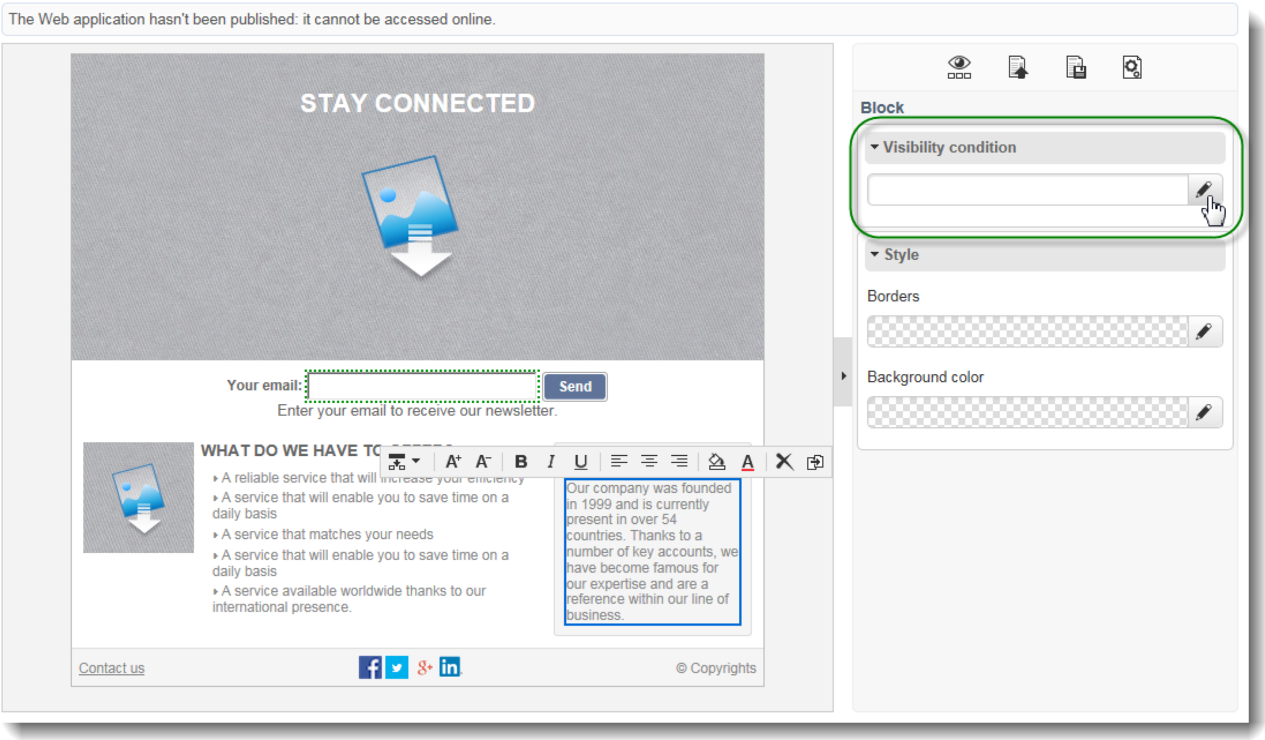
You can:

- Determine the display for one or several blocks, refer to Defining a visibility condition [page 16],
- Define the borders and frames, refer to Adding a border and background [page 18],
- Define image attributes (size, caption), refer to Editing image properties [page 18],
- Link the database to a form element (input zone, checkbox), refer to Changing the data properties for a form [page 19],
- Make a part of a form mandatory, refer to Changing the data properties for a form [page 19],
- Define an action for a button, refer to Adding an action to a button [page 20].

Defining a visibility condition

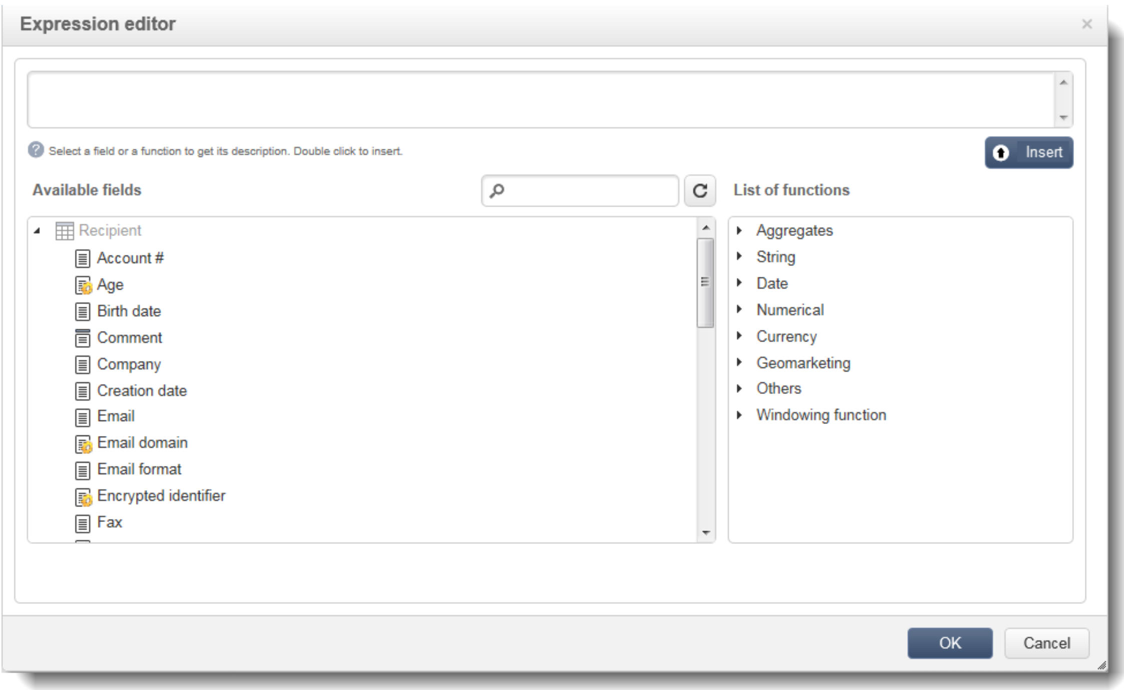
You can specify a visibility condition on a web page element: this element will only be visible if the condition is respected.

To add a visibility condition, select a block and enter the condition in the **Visibility condition** field using the expression editor.



Note:

Advanced expression editing is presented in the List of functions in the expression editor.



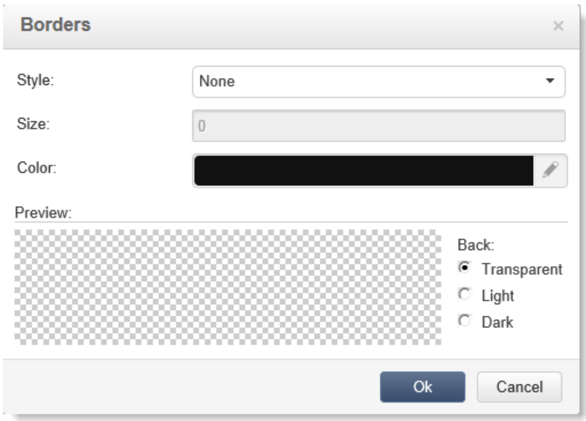
These conditions adopt the XTK expression syntax (for example **ctx.recipient.@email != ""** or **ctx.recipient.@status=="0"**). By default, all fields are visible.

Note:

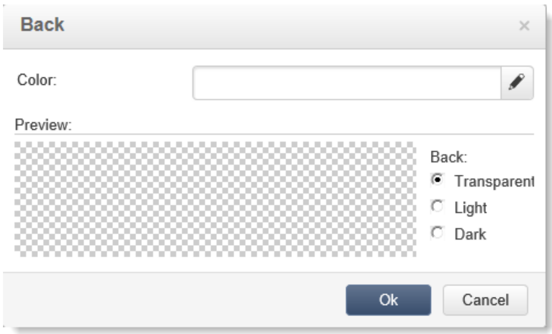
Non-visible dynamic blocks, such as drop-down menus, cannot be edited.

Adding a border and background

You can add a **border** to a selected block. The borders are defined using three options: style, size and color.



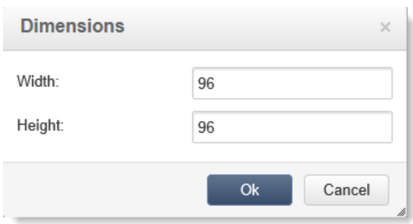
You can also define a **background color** by selecting a color from the color chart.



Editing image properties

When you select a block containing an image, you access the following properties:

- **Caption** lets you define the caption linked to the image (corresponds to the **alt** HTML attribute).
- **Dimensions** lets you specify the image size, in pixels.



Changing the data properties for a form

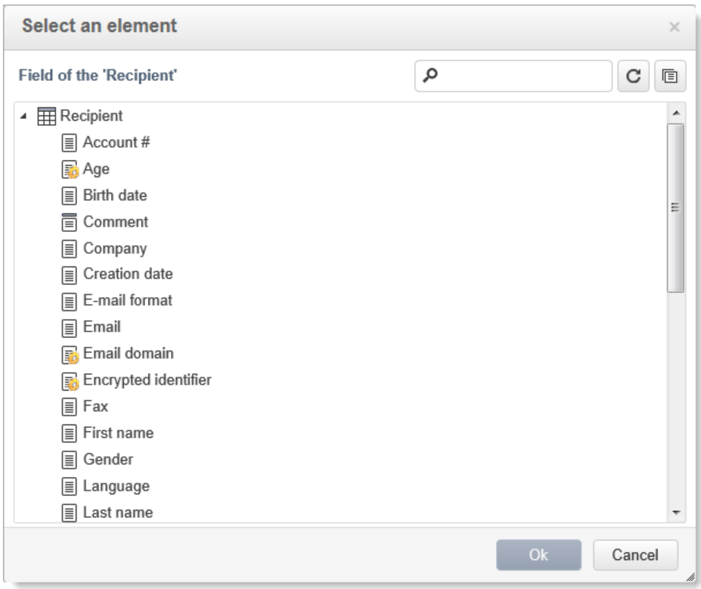
You can link database fields with input zone, radio button or checkbox type blocks.

Note:

The default fields are those in the Web application storage schema.

- The **field** input zone lets you select a database field to link with the form field.

  By default, the fields offered are those in the **nms:recipient** table.



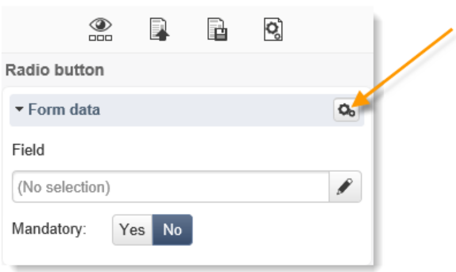
- The **Required field** option lets you only authorize the page's approval if the user has filled in the field. If a required field is not filled in, an error message will appear.

  For radio buttons and checkboxes, **additional configuration is required**.

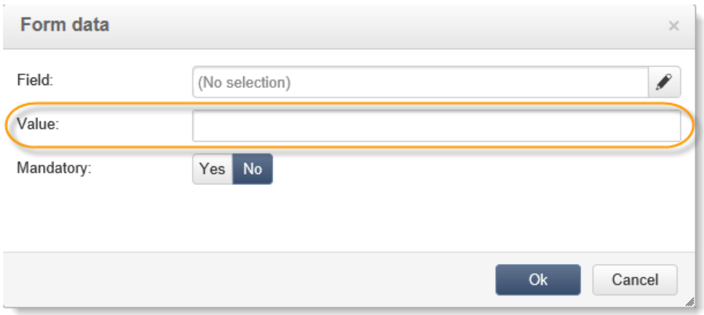
  Indeed, if the template used does not contain a value by default, you must complete it in the editor.

  To do this:

  - Click the **Edit** icon.

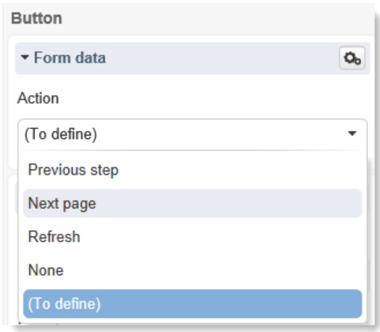


- Enter the itemized list value (defined by the selected field) into the **Value** field.



Adding an action to a button

When the user clicks a button, you can define an associated action. To do this, select the action to be carried out from the drop-down list.



The actions available are as follows:

- **Refresh**: refreshes the current page.
- **Next page**: creates a link to the next page in the Web application.
- **Previous page**: creates a link to the previous page in the Web application.

Note:

The **None** value allows you to not activate the button.

You can modify the label linked to the button in the corresponding field.

Using the toolbar

The toolbar is a **pop-up element** of the DCE interface that presents different functions according to the selected block.

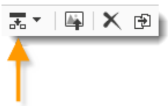
Warning:

Certain toolbar functions let you format the HTML content. However, if the page contains a CSS style sheet, the **instructions** from the style sheet may prove to take **priority** over the instructions specified with the toolbar.

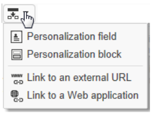
Adding a link

You can insert a link into any page element: image, word, group of words, block of text, etc.

To do this, select the element then use the first icon from the pop-up menu.



This icon lets you access all the available types of links.



Personalization blocks and fields can only be inserted into Text type blocks.

Note:

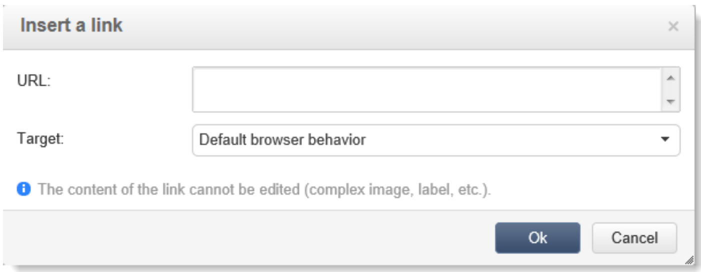
For each type of link, you can configure the opening mode: select the target window in the **Target** drop-down list. This value corresponds to the **<target>** HTML tag.

The list of available **targets** is as follows:

- Other (IFrame)
- Top window (_top)
- Parent window (_parent)
- New window (_blank)
- Current window (_self)
- Default browser behavior

Link to a URL

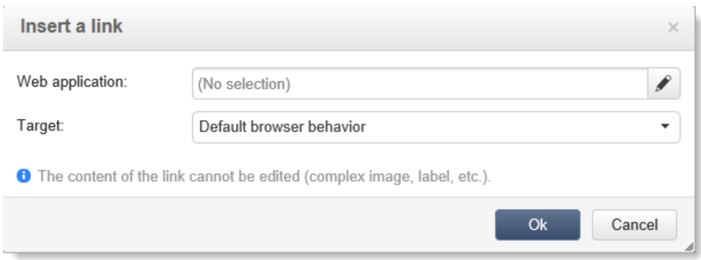
The **Link to an external URL** option lets you open any URL from the source content.



Enter the link address in question into the **URL** field. The URL field should be entered as: **http://www.myURL.com**.

Link to a Web application

The **Link to a Web application** option lets you access an Adobe Campaign Web application.

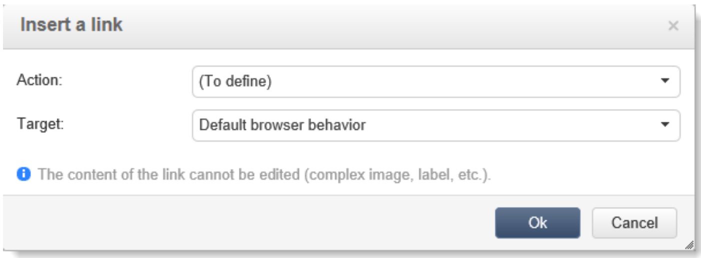


Select the Web application from the corresponding field.

The list of suggested Web applications corresponds to the available applications in the **Resources** > **Online** > **Web Applications** node.

Link to an action

The **Link that defines an action** option lets you configure an action when clicking a source element.



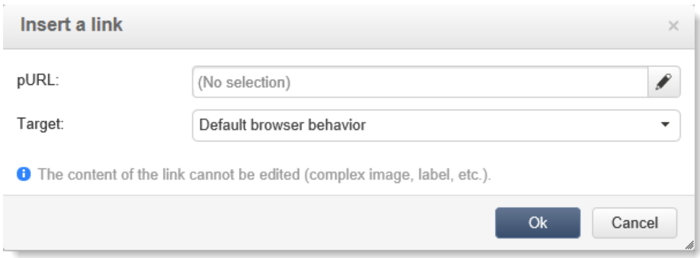
Note:

Available actions are detailed in the Adding an action to a button [page 20] section.

Link to a pURL

The **Link to a pURL** option lets you access a microsite via a pURL.

The list of pURLs offered corresponds to the pURLs available in the **Administration** > **Production** > **pURL** node.



Warning:

To insert a pURL, the **Microsite** option must be installed. Check your license contract.

Delete a link

When a link has been inserted, the tool bar offers two new icons: **Edit link** and **Break the link** that let you interact with the link created.

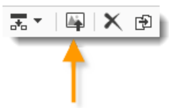
- **Edit link** lets you display a window featuring all the parameters of the link.
- **Break the link** lets you delete, after confirmation, the link and all related parameters.

Note:

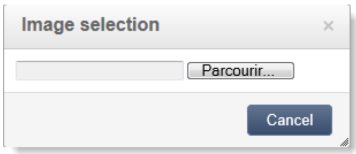
If the link is deleted, the content is still kept.

Adding / Deleting / Duplicating an image

To insert an image, select an Image type block and click the **Image** icon.



Select an image file saved locally.



Note:

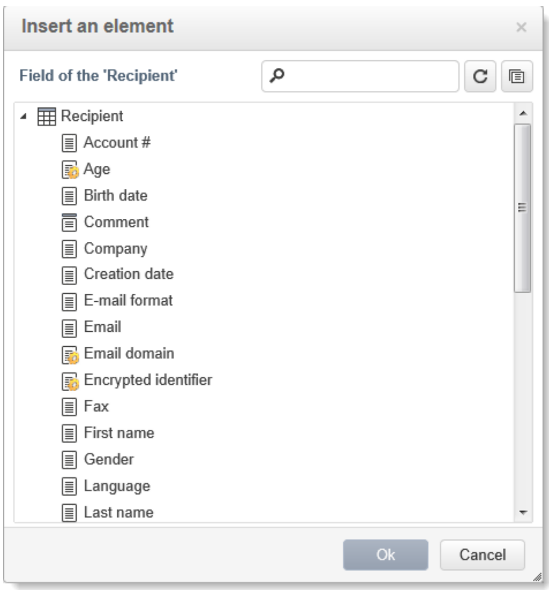
- The **Delete** icon deletes the <img> tag containing the image.
- The **Duplicate** icon duplicates the <img> tag and its content.

Warning:

When you duplicate an image, the identifiers related to the new image are deleted.

Inserting a personalization field

The **Personalization field** option for the insert icon lets you add a database field into the content, such as the recipient's name. This option is only available for text type blocks.



By default, the fields offered are from the **Recipient** table. Where necessary, edit the Web application properties to select another table.

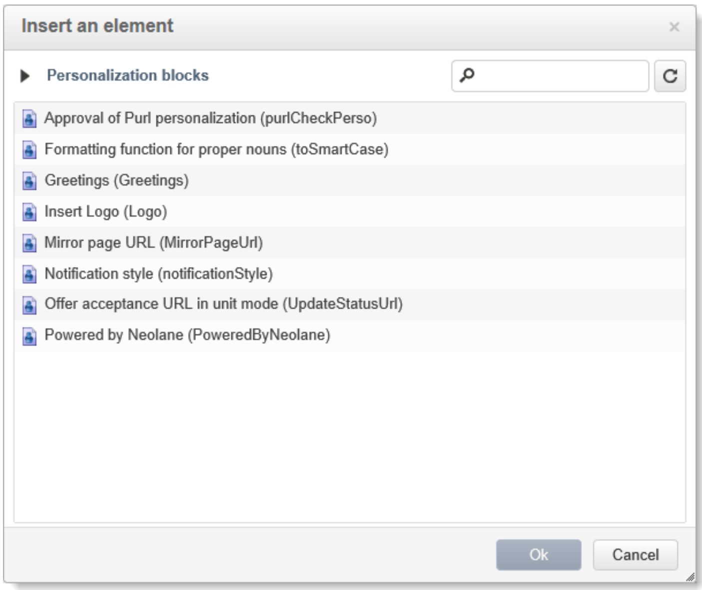
The field name appears in the editor, highlighted in yellow. It will be replaced by the profile of the targeted recipient when the personalization is generated (for example, when previewing a landing page).

An example is presented in the Inserting a personalization field [page 35] section.

Inserting a personalization block

The **Personalization block** option lets you insert a personalization block into the content. It is not available for Text type blocks.

These personalization blocks are dynamic, personalized and contain a specific rendering. For example, you can add a logo or a greeting message. In the case of a delivery, you can even add a link to a mirror page (see Delivering with the DCE [page 38]).



The personalization block name appears in the editor, highlighted in yellow. It is automatically adapted to the recipient profile when personalization is generated.

An example is presented in the Step 4: Creating content for your delivery [page 40] section.

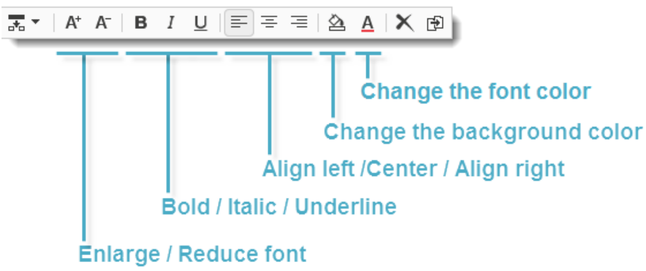
Personalization blocks are accessed via the **Resources** > **Campaign Management** > **Personalization blocks** node of the Adobe Campaign explorer.

Note:

For more on creating and modifying personalization blocks, refer to the Adding personalization blocks section.

Changing font attributes

When you select a text element, you can modify font attributes (style, format).



The available options are as follows:

- **Enlarge font** icon: increases the size of the selected text (add <span style="font size:">)
- **Reduce font** icon: reduces the size of the selected text (add <span style="font-size:">).
- **Bold** icon: makes selected text bold (wrap text with the tag).
- **Italic** icon: makes selected text italic (wrap text with the tag).

- **Underline** icon: makes selected text underlined (wrap text with the <span style="text-decoration: underline;"> tag).
- **Align left** icon: aligns text to the left of the selected block (add style="text-align: left;").
- **Center** icon: centers the text for the selected block (add style="text-align: center;").
- **Align right** icon: aligns text to the right of the selected block (add style="text-align: right;").
- **Change the background color** icon: lets you change the background color for the selected block (add style="background-color: rgba(170, 86, 255, 0.87)).
- **Change text color** icon: lets you change the text color of the selected block or just the selected text (<span style="color: #56ff56;">).

Note:

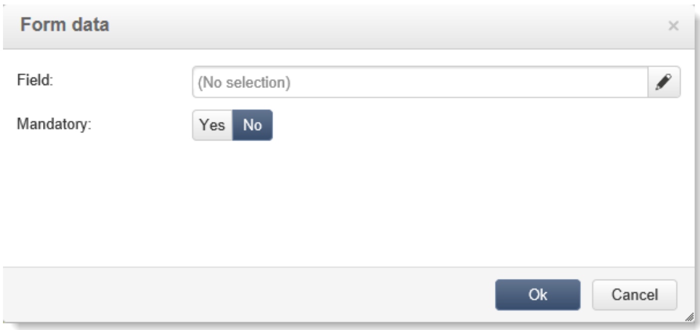
- **Delete** icon: deletes the block and all its content.
- **Duplicate** icon: duplicates the block as well as all the styles related to the block.

Modifying form fields

Form fields such as radio buttons, input zones, drop-down lists, etc. can be modified from their toolbars.

This means you can:

- Delete the block containing the form fields using the **Delete** icon.
- Duplicate the selected field by creating a new block using the **Duplicate** icon.
- Edit the **Form data** window to link a database field to the form zone, using the **Edit** icon.



Managing images and animations

The Digital Content Editor lets you work on **any type of image** compatible with browsers.

To be compatible with the DCE, **"Flash" type animations** must be inserted into an HTML page in the following way:

```
<object type="application/x-shockwave-flash"
data="http://www.mydomaine.com/flash/your_animation.swf" width="200" height="400">
 <param name="movie" value="http://www.mydomaine.com/flash/your_animation.swf" />
 <param name="quality" value="high" />
 <param name="play" value="true"/>
 <param name="loop" value="true"/>
</object>
```

Warning:

You must not call up **external files in a <script> tag** of the HTML page. These files will not be imported onto the Adobe Campaign server.

Information messages and error messages

The upper section of the editor displays messages related to the status of the content. The color codes for the messages are as follows:

- **Grey message**: information message, no actions need to be carried out in the editor.
- **Blue message**: information message related to the content being edited.
- **Yellow message**: warning or error message requiring action on behalf of the user.

List of messages when editing a Web application

- The HTML content is functional.
- The Web application has not been published and cannot be accessed online.
- The Web application is online, please publish again to apply any changes.
- The page content isn't functional. It must include an HTML form (<form/>).
- There are n input zone(s) or buttons to configure.
- To enable the transition to the next page, you need to link the 'Next page' action to a button or a link on the current page.

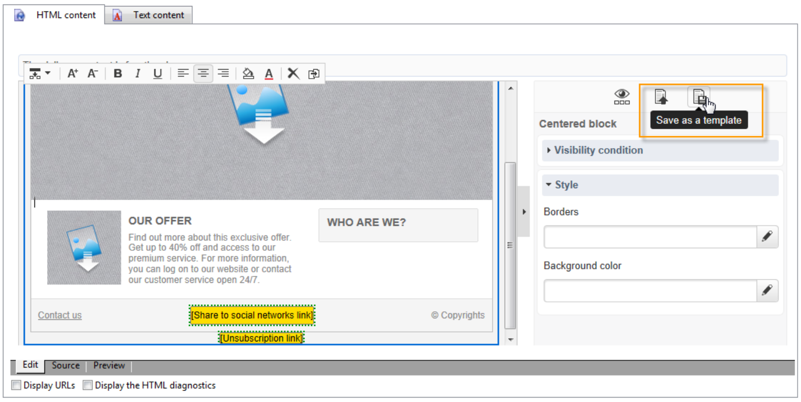
List of messages when editing a delivery

- The delivery content is functional
- There are n fields or personalization blocks to configure.
- The delivery content is ready, please run the analysis again to apply any changes.
- The delivery is ready to be sent.

Saving a delivery as a template

After configuring a delivery, you can save it as a template in order to re-use it for future deliveries.

In the **Campaigns** universe, open the chosen delivery. Click on the **Save as template** button, name the template and then save.



Note:

The new template is saved under **Resources** > **Templates** > **Content models** node in the explorer.

Best practices

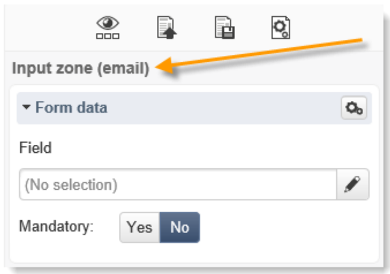
To ensure the editor's optimal operation, we recommend observing the following guidelines:

- Before **importing an HTML page template** in Adobe Campaign, please make sure the template opens and displays correctly in the various browsers.
- If the HTML page contains **JavaScript scripts**, they need to execute **without errors** outside of the editor.
- When building a template, we recommend adding a **'type'** attribute to <input> tags. This information will be processed by the editor and help the user to link a field of the database to the field of the form when configuring the Web application.

  Example of HTML code in the template:

  ```
  <input id="email" type="email" name="email"/>
  ```

The **'type'** attribute is visible in the interface in the following form:



The official list of 'type' attributes is available at the following address: http://www.w3schools.com/tags/att_input_type.asp

- Steps to simulating an end page with the DCE:

- Make sure that there is only one <body> </body> in the page.
- When a CSS or JS file is uploaded, the images contained within the.zip file are not uploaded. The references to these images present in the CSS are therefore not updated.
- Iframe: the linked pages are not uploaded.

Supported formats

The Digital Content Editor supports the HTML format: you can switch-over to **source** mode at any time.

The Digital Content Editor's import function works as follows with the following supported formats:

- CSS: the images present in the .zip file are not imported. The references to these images in the CSS are not updated.
- JS: the images present in the .zip file are not imported. The refences to these images in the JS are not updated.
- Iframe: the linked pages are not imported.
- Landing pages & Web apps: if a **form** tag is missing, a warning will appear. A <form> </form> must always be present in the message body.
- Supported Code-pages
  - iso-8859-1
  - iso-8859-2
  - utf-7
  - utf-8 (recommended when using a BOM)
  - iso-8859-15
  - us-ascii
  - shift jis
  - iso-2022-jp
  - big-5
  - euc-kr
  - utf-16

Note:

The HTML code page must be defined in a meta tag (HTML 4 or HTML 5) or in the BOM. If no code page is available, open the file in latin1.

Creating a landing page

Introduction

This use case shows the use of the Digital Editor to create a Landing Page from the Adobe Campaign console.

Before you start configuring the Landing Page in Adobe Campaign, make sure you have **one or more templates** to represent the HTML page(s).

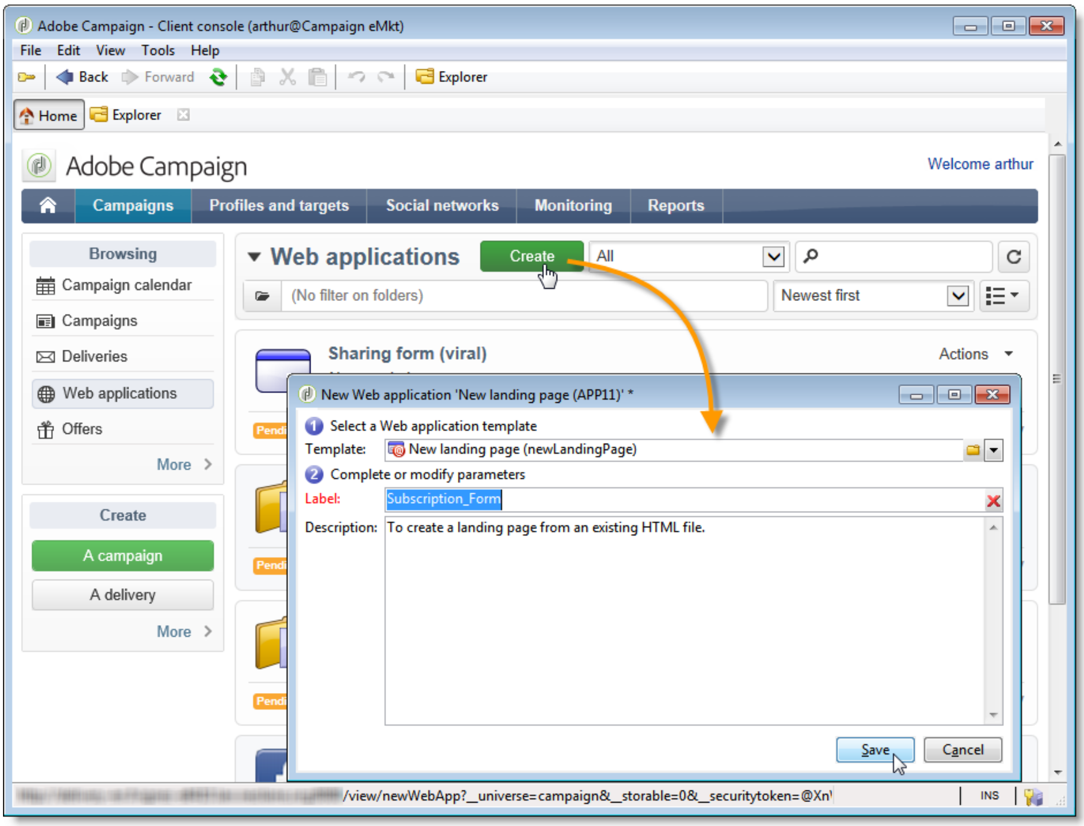
The **main aim** of this use case is to make the Landing Page form fields correspond with the internal fields in Adobe Campaign using the functions in the DCE.

Creating the landing page

To create a new Landing Page type Web application, use the following steps:

1 Go to the **Campaigns** universe and click the **Web application** link, then click the **Create** button.

2 Select the **New landing page** template and enter a label, then click **Save**.

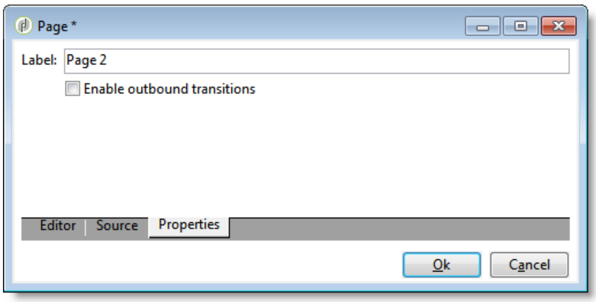


3 Click the **Edit** tab.

4 Delete the **End** activity.

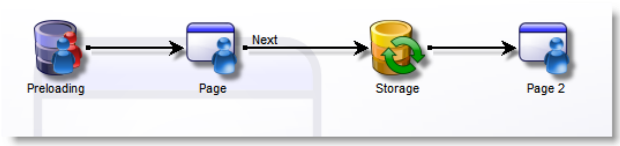
5 Add a **Page** activity after the **Record** activity.

6 Edit the **Page 2** activity then uncheck the **Activate outbound transitions** option in the **Properties** tab.



7 Save changes.

Use the following scenario:



Note:

For more on creating a Web application, refer to Creating a Web form [page 46].

Step 1: Selecting and loading templates

In this section, we are going to look at how to **import HTML content** for each page of the Web application.

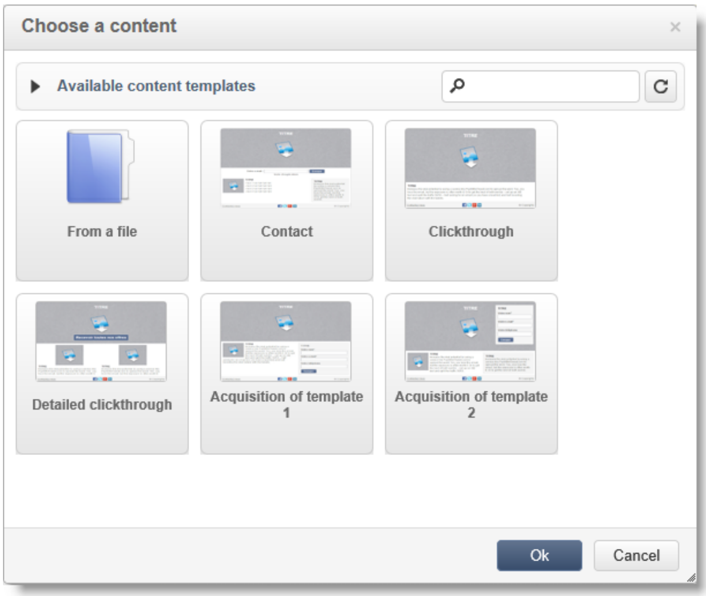
A template must contain:

- an **HTML** file (mandatory)
- one or more **CSS** files (optional)
- one or more **images** (optional)

To load the template on the first page, apply the following steps:

1 Open the first **Page** activity of the Web application.

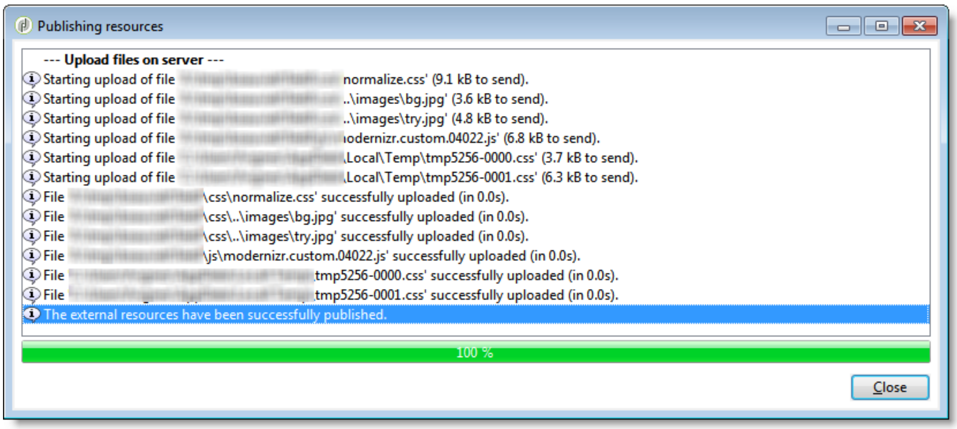
2 Select **From a file** to fetch your content template



3 Select the HTML file to use.

4 Click **Open** to start the import.

Click the **Close** button once the import has finished.



Note:

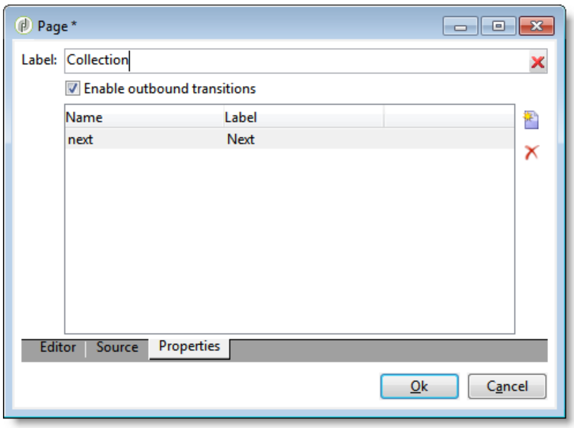
During loading, the list of shared files is displayed. The import system checks that all files linked to the selected HTML are there (CSS, images, etc.).

Warning:

You must wait until the phrase **The external resources have been successfully published.** appears before clicking the **Close** button.

5 Click the **Properties** tab.

6 Enter a **label** for each page (here: Page 1= Collect, Page 2=Thank you).



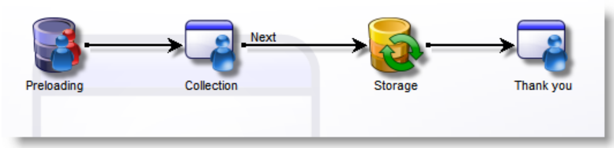
Apply these steps for each page inserted in the Web application.

Warning:

The DCE executes the JavaScript code for the loaded HTML page. JavaScript errors in the HTML template which may appear in the Adobe Campaign interface. These errors are not related to the editor. To check that there are no errors in the imported files, it is recommended you test them in a browser (Internet Explorer / FireFox / Chrome) before importing the files into the DCE.

Step 2: Configuring the content

In this section, we are going to adjust imported content and link the fields of the database to the form of the web page. The Web application created previously is:



Modifying content

Let's start by changing the colors of the page. To do this:

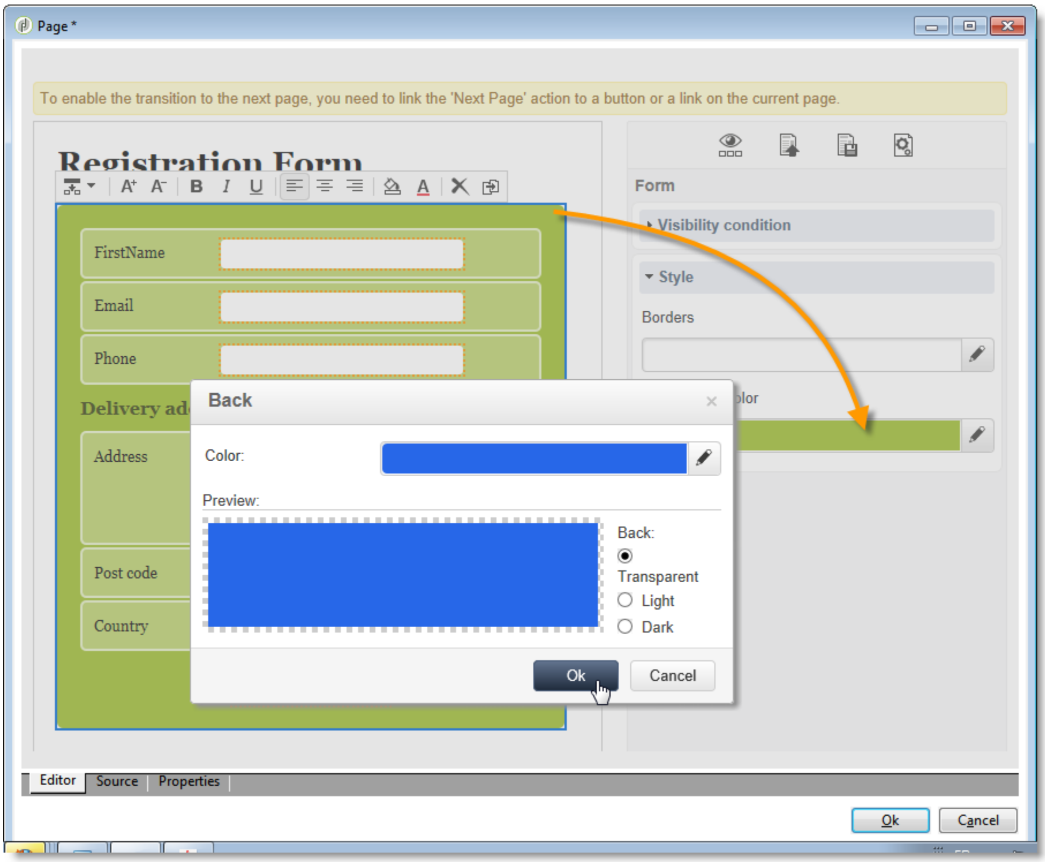
1 Open the **Collection** page.

2 Click the background.

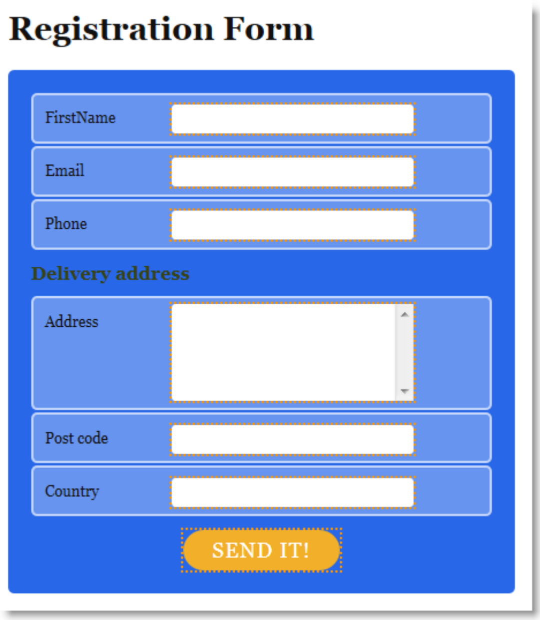
3 Click **Background color** on the right-hand side.

4 Select a new background color.

5 Click **OK** to confirm the change.



6 Apply these same processes to change the color of the button



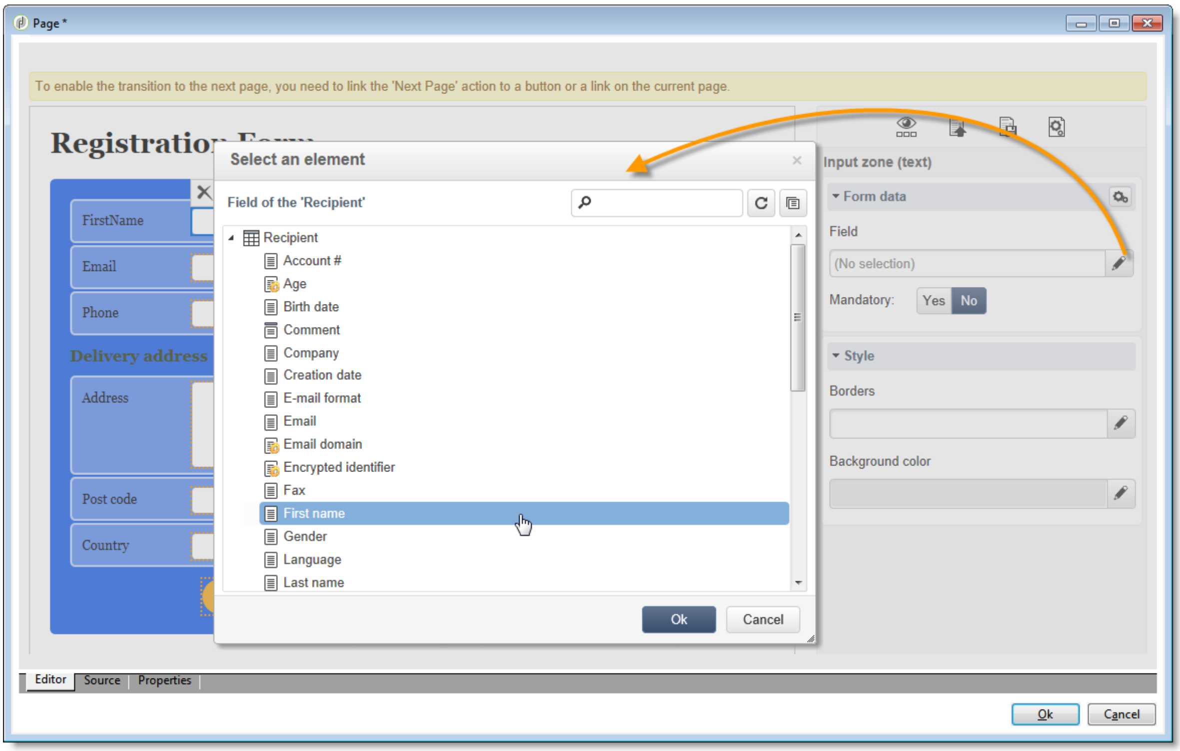
Linking form fields

We are going to link the fields in the page to those in the database, in order to save the information provided.

1 Select a form field.

2 Edit the **Field** section on right-hand side of the editor.

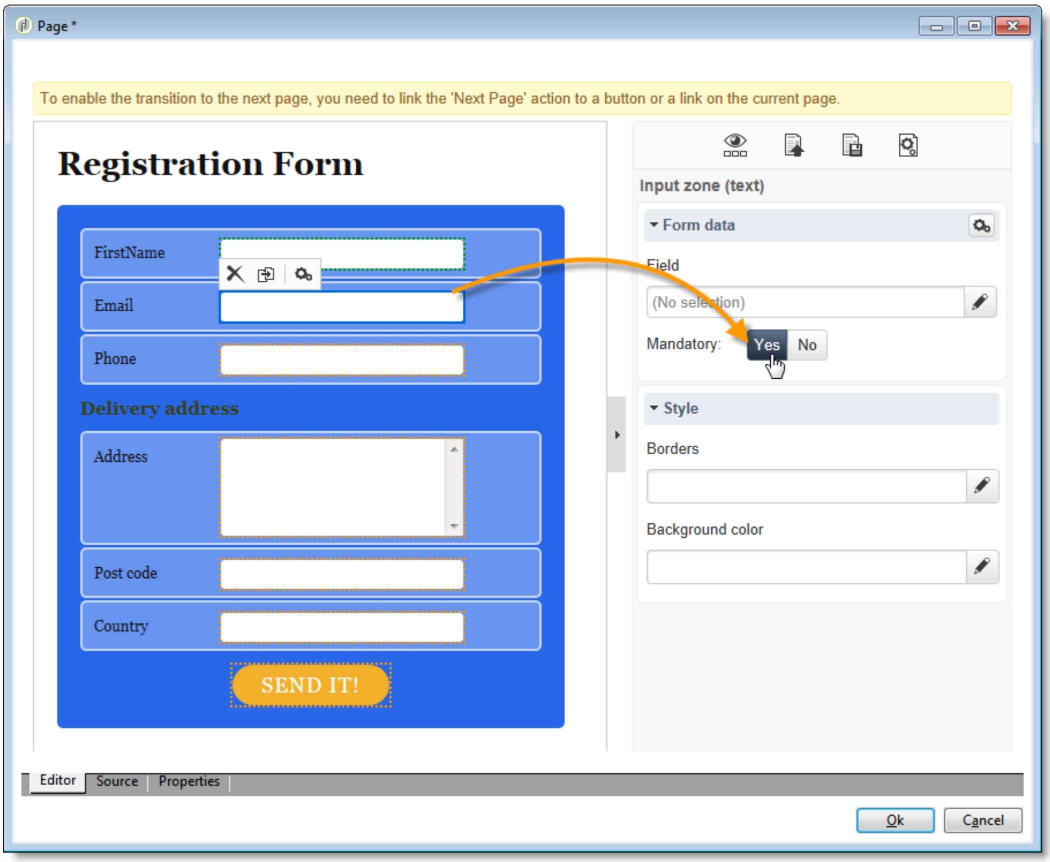
3 Select the database field that you want to link to the selected field.



4 Repeat this process for each field on the page.

Note:

You can make a field mandatory: for example, click the **Email** field then enable the **Mandatory** option.

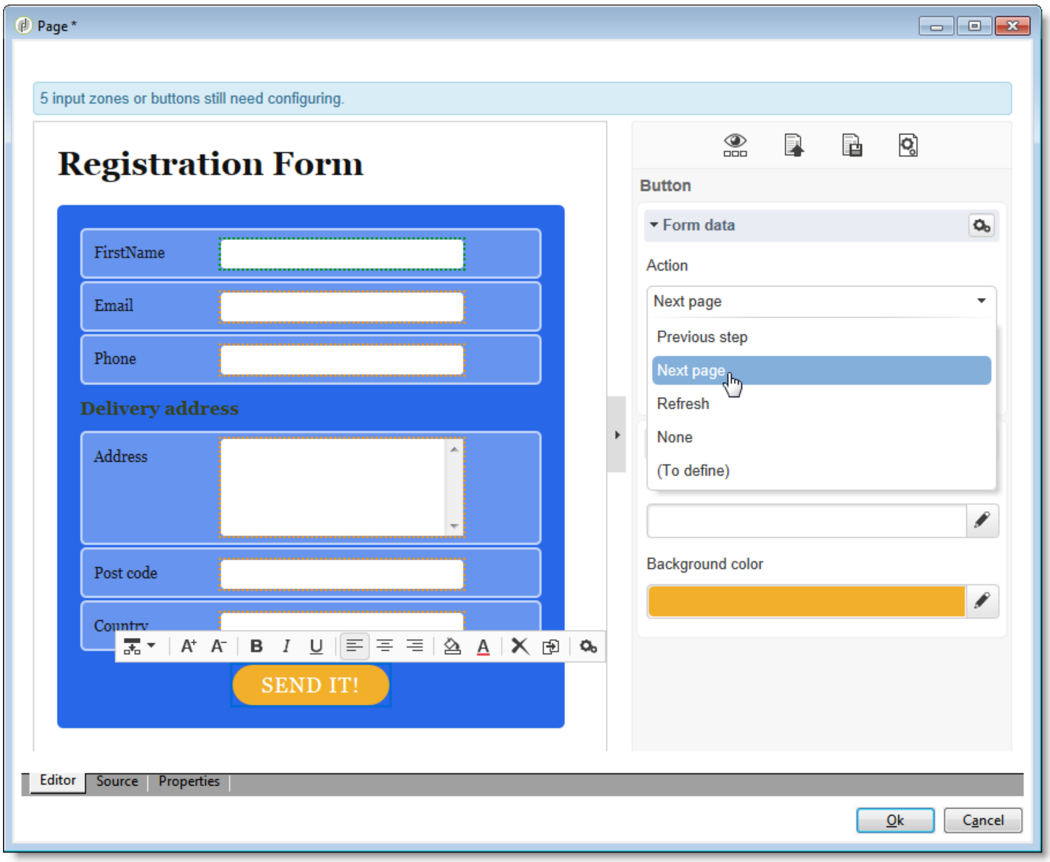


Creating a link to the next page

This step is mandatory because it will allow the Web application to determine the sequence of the next steps: Saving the collected data in the database then displaying the next page (**Thank you**).

1. Select the **Send it!** button of the **Collection** page.
2. Click the **Action** drop-down menu.

3 Select the **Next page** action.



Inserting a personalization field

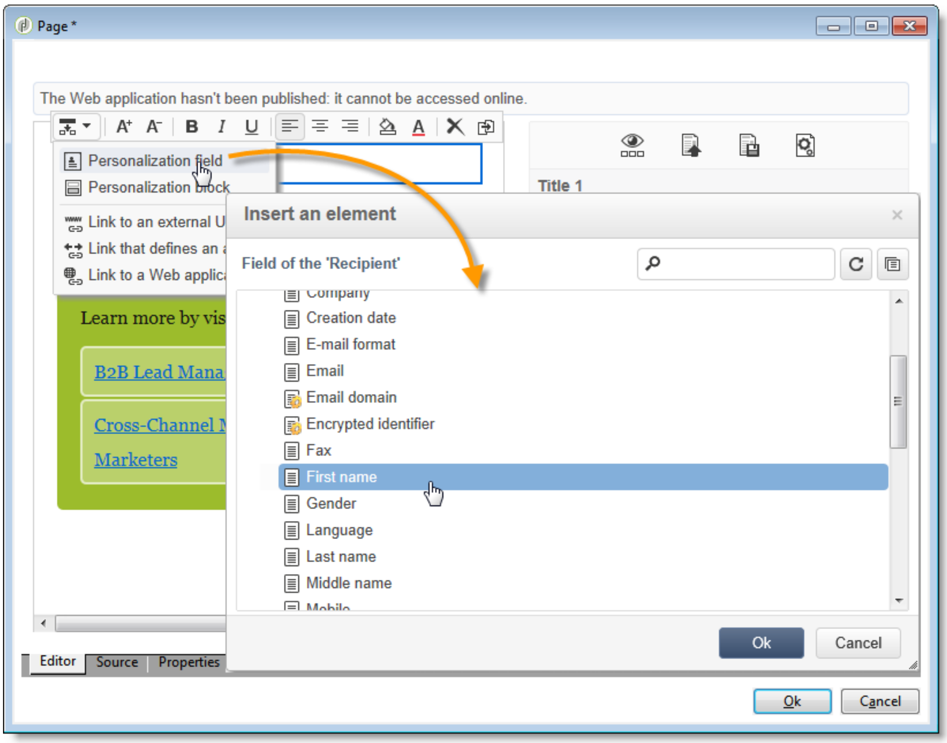
This step lets you personalize the Thank you page. To do this:

1 Open the **Thank you** page.

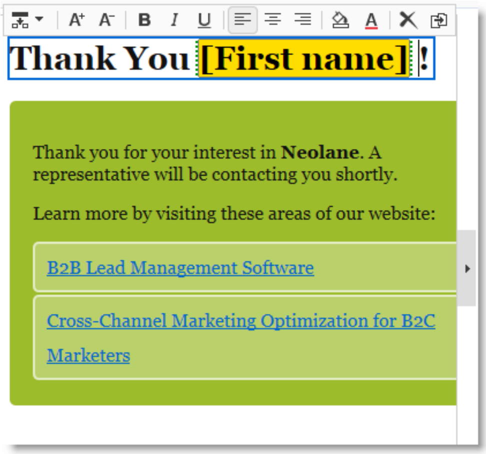
2 Place the cursor in a text area, where you wish to insert the recipient's first name.

3 Select **Personalization field** in the **Insert** menu of the toolbar.

4 Select the first name.

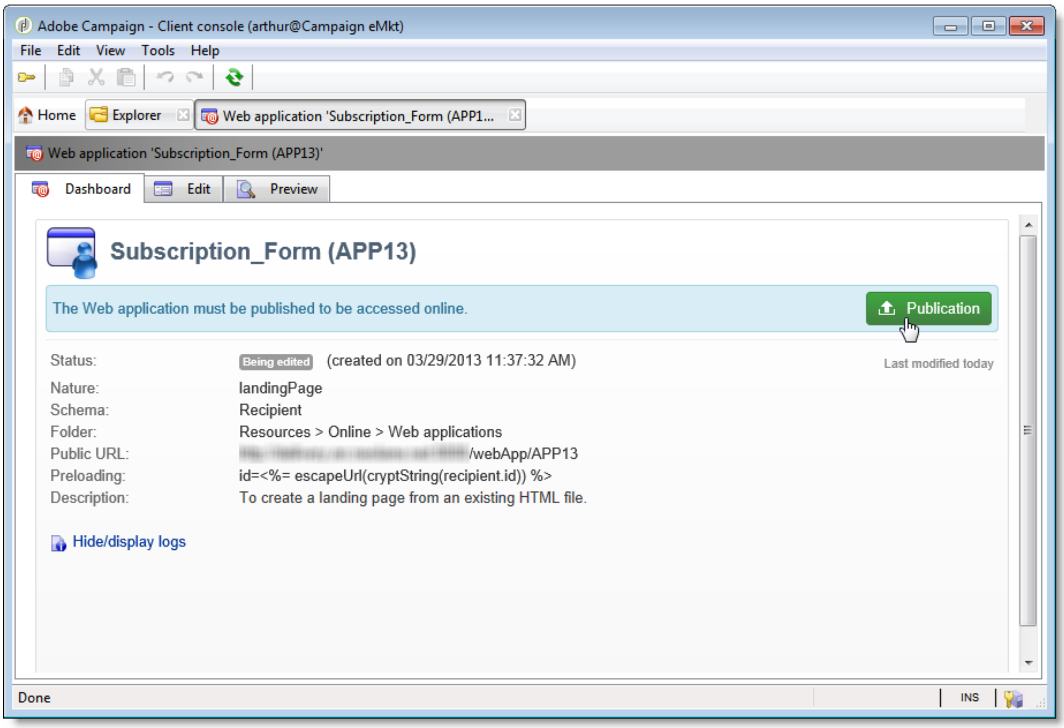


The personalization field has a yellow background in the editor.



Step 3: Publishing content

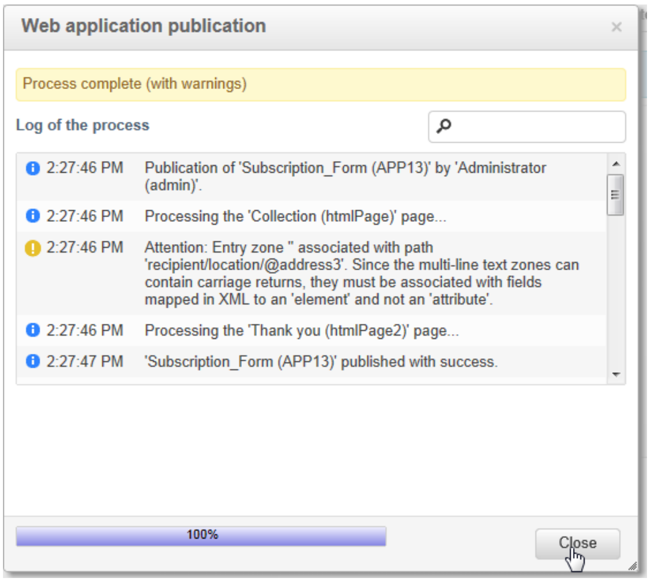
Content is published from the web application dashboard. Click the **Publication** button to run it.



During publication, a log is displayed. The publishing system analyzes all the content found in the Web application

Note:

In the publication log, warnings and errors are sorted by activity.



The form is now available: its URL is accessible in the application dashboard and can be sent to recipients.

Delivering with the DCE

Introduction

Here we suggest you follow the steps for performing an email delivery using the Digital Content Editor.

Our final goal is to create a delivery with a personalized template which contains:

- A direct address for a recipient (using first and second names)
- Two types of links to an external URL
- A mirror page
- A link to a web application

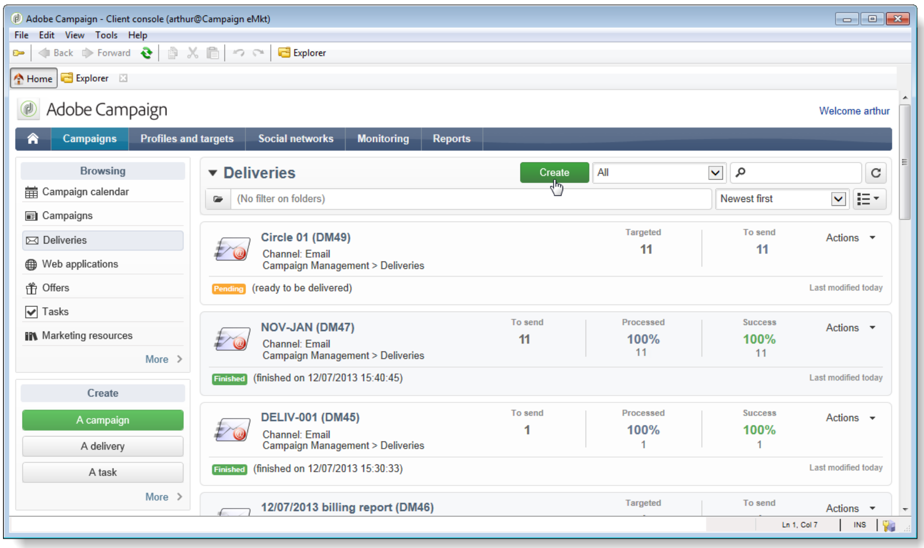
Note:

Before you start, you must have at least one **HTML template** configured to host the content of your future deliveries.

In the delivery **Properties**, make sure that the **Content editing mode** (**Advanced** tab) is set to **DCE**. To ensure the editor's optimal operation, refer to the Best practices [page 26].

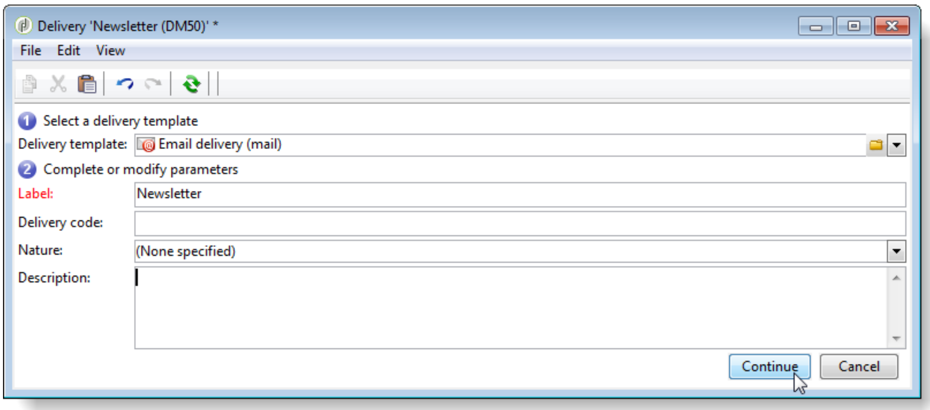
Step 1: Creating a delivery

To create a new delivery, place your cursor in the **Campaigns** universe and click **Deliveries**. Next click the **Create** button above the list of existing deliveries. For more on creating deliveries, refer to Creating deliveries.



Step 2: Selecting a delivery template

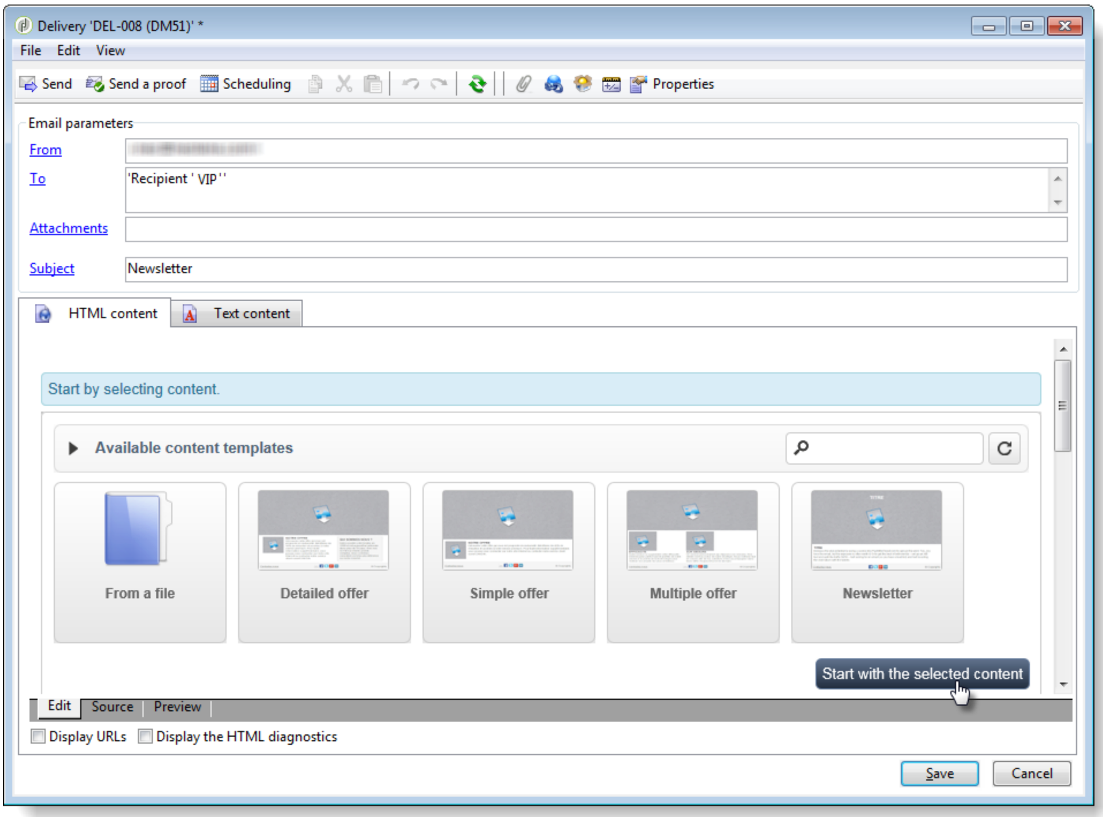
Select a delivery template, then name your delivery. This name will only be visible to users of the Adobe Campaign console and not by your recipients, however this heading will be displayed in your list of deliveries. Click **Save**.



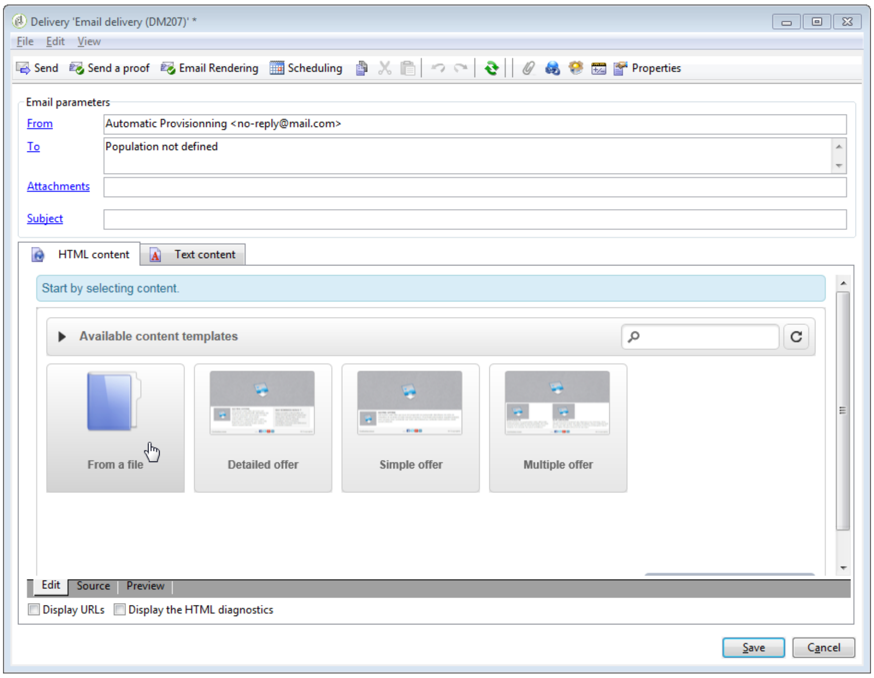
Step 3: Selecting a content template

The Digital Content Editor comes with various out-of-the-box templates with varying structures (columns, text areas, etc.).

Select the content model that you want to use, then click the **Start with the selected content** button to display the template in the created delivery.



You can also import an HTML content created outside of Adobe Campaign by selecting **From a file**.



You can save this content as a template for future use. Once a personalized content template is created, you can preview it from the list of templates. For more on this, refer to Template management [page 13].

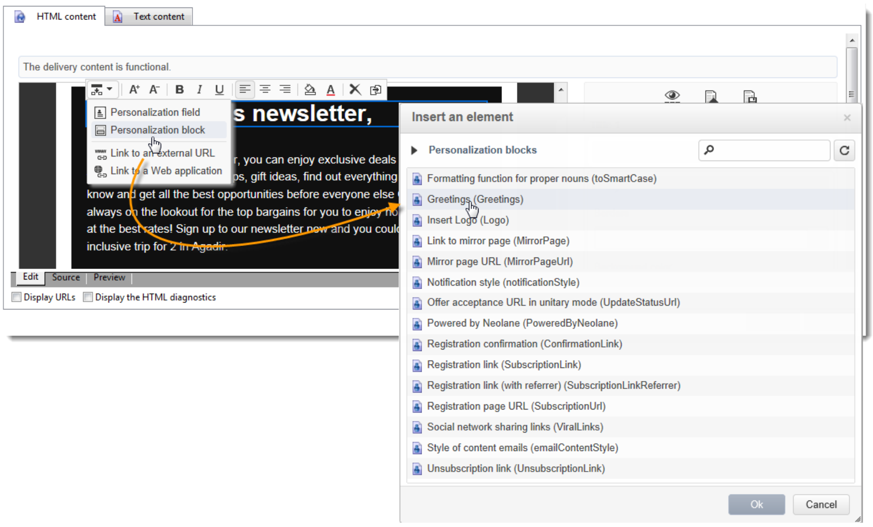
Warning:

If you are using the Adobe Campaign web interface, you must import a .zip file containing the HTML content and related images.

Step 4: Creating content for your delivery

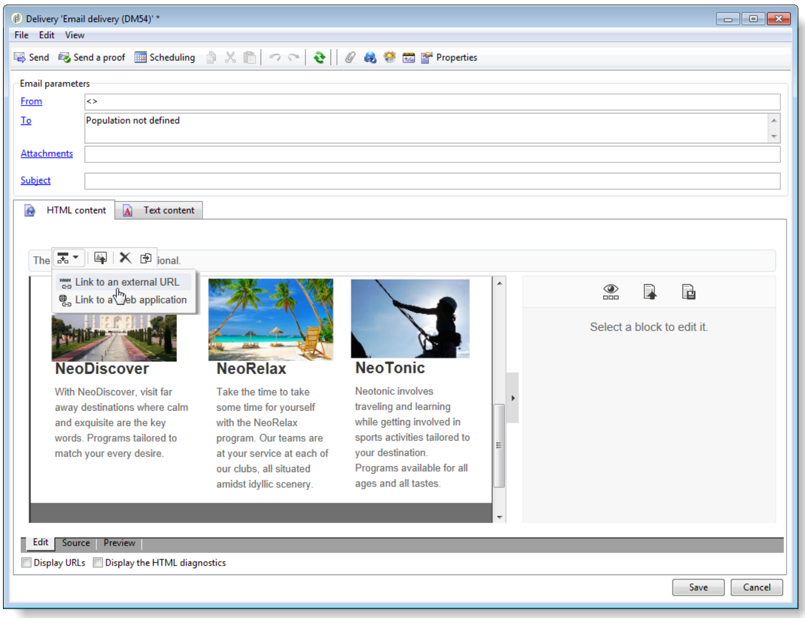
- Display the first and second names of your recipients

  To insert the first and second names of your recipients into a text field in your delivery, click your chosen text field, then place your cursor where you want to display them. Click the first icon in the pop-up toolbar, then click **Personalization block**. Select **Greetings**, then click **Ok**.



- Insert a link into an image

  To take delivery recipients to an external address via an image, click on the relevant image to display the pop-up toolbar, place the cursor on the first icon then click **Link to an external URL**. For more on this, refer to Using the toolbar [page 20].



  Enter the URL for the link in the **URL** field using the following format **http://www.myURL.com**, then confirm.

  Note:

  The link can be changed at any time using the section to the right of the window.

- Insert a link into text

  To integrate an external link into the text in your delivery, select some text or a block of text then click on the first icon in the pop-up toolbar. Click **Link to an external URL**, enter the link address into the **URL** field. For more on this, refer to Using the toolbar [page 20].

  Note:

  The link can be changed at any time using the section to the right of the window.

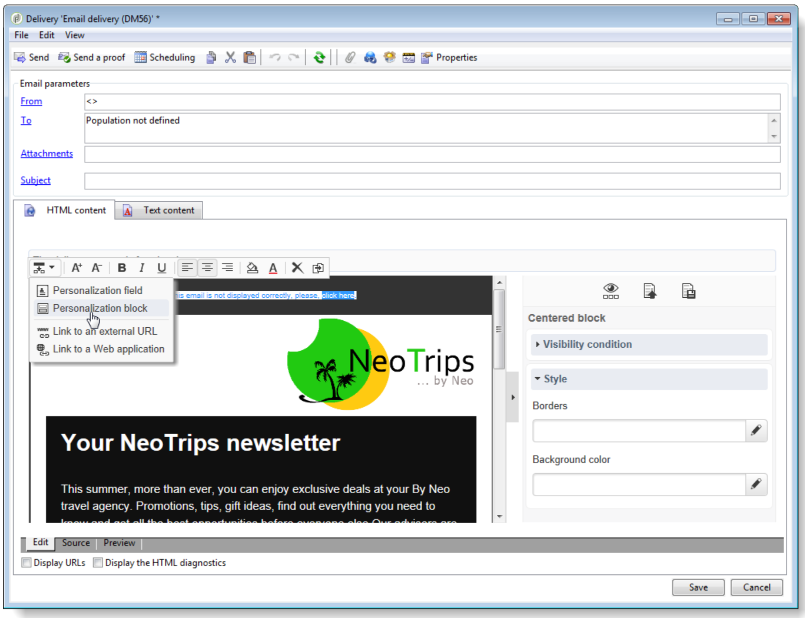
  Warning:

  The text entered in the **Label** field replaces the original text.

- Add a mirror page

  To allow your recipients to view your delivery content in a Web browser, you can integrate a link to a mirror page into your delivery.

Click the text field in which you wish to see the link posted. Click the first icon in the pop-up toolbar, select **Personalization block**, then **Link to Mirror Page (MirrorPage)**. Click **Save** to confirm.



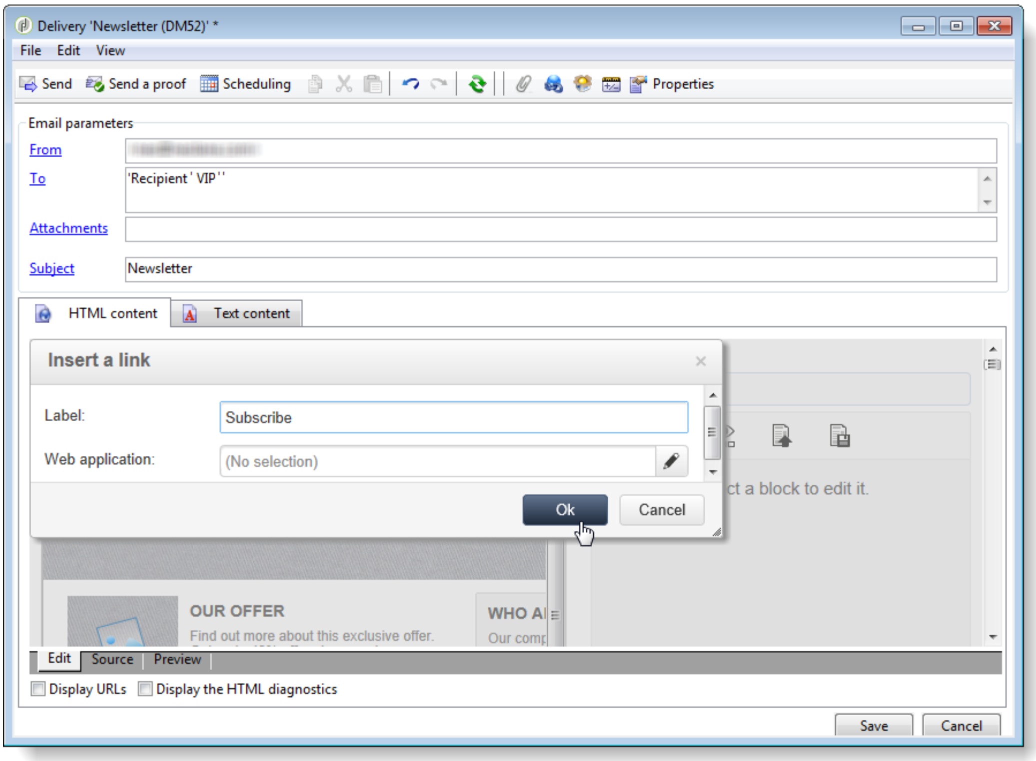
Warning:

The personalization block label automatically replaces the original text in your delivery.

- Integrate a link to a Web application

  The Digital Content Editor lets you integrate links to Web applications from your Adobe Campaign console, such as a landing page or a form page. For more on this, refer to Using the toolbar [page 20].

Select a text field for your link to a Web application, then click the first icon. Choose **Link to a Web application**, then select the desired application by clicking the icon at the end of the **Web Application** field.



Click **Save** to confirm.

Note:

This step requires you to save at least one Web application beforehand. These can be found in the **Campaigns** > **Web applications** universe of your console.

Step 5: Saving the delivery

Once the content is integrated, save the delivery by clicking **Save**. It will now be displayed in your list of deliveries, found in the **Campaigns** > **Offers** universe.

CHAPTER 3

Web Forms

Table of Contents

Overview

Adobe Campaign integrates a graphical module for defining and publishing Web forms to create pages containing input and selection fields, and which may include data in the database. This lets you design and post web pages which users can access to view or enter information.

This chapter details the creation and management of Web forms, how to manage fields and pages, as well as storage and saving modes.

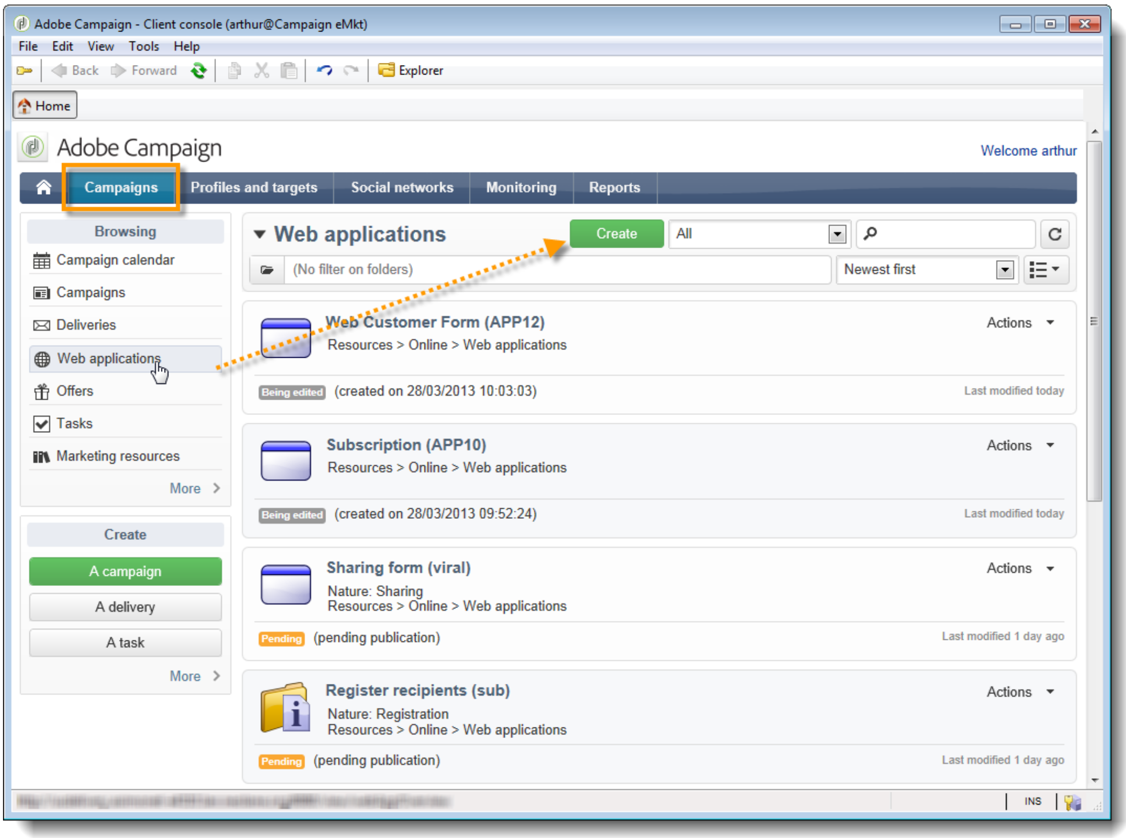
Creating a Web form

This chapter details the steps required for designing a **webForm** type form in Adobe Campaign, as well as the available options and configurations. Adobe Campaign lets you make this Web form available to users as well as collect and archive answers in the database.

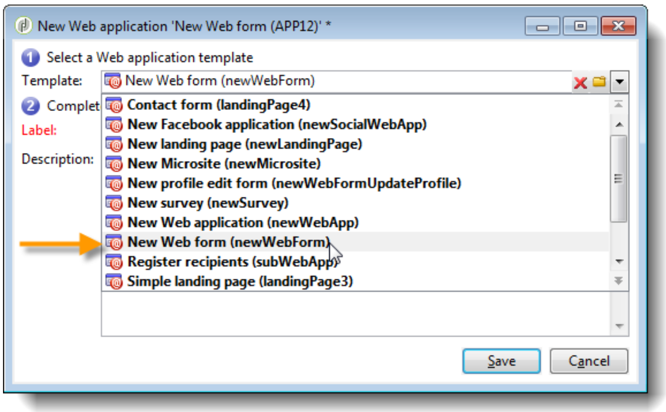
Creation steps

Web forms are accessed via the Web Applications menu of the **Campaigns** universe. In the Adobe Campaign tree, they are grouped under the **Resources > Online > Web Applications** node.

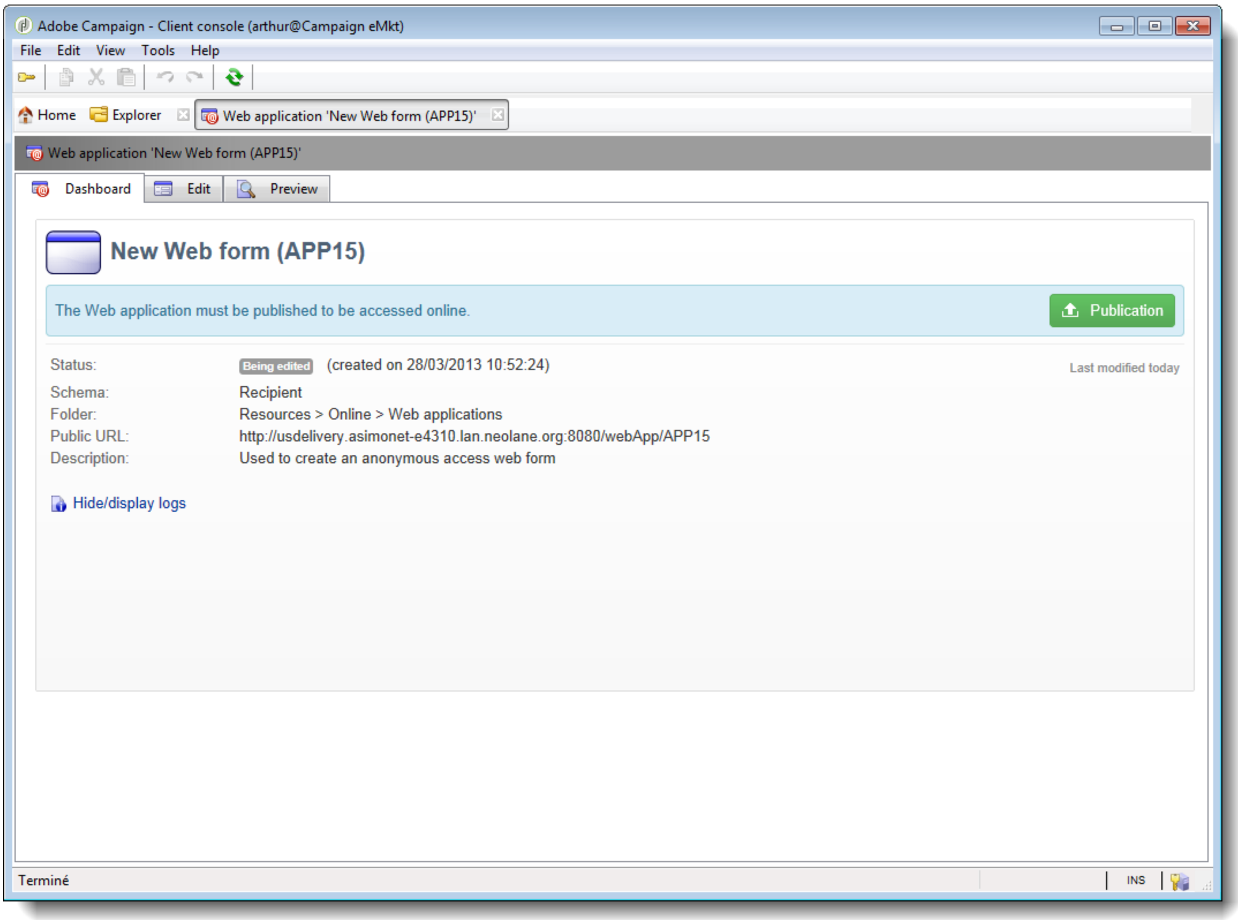
To create a Web form, click the **Create** button above the list of Web applications.



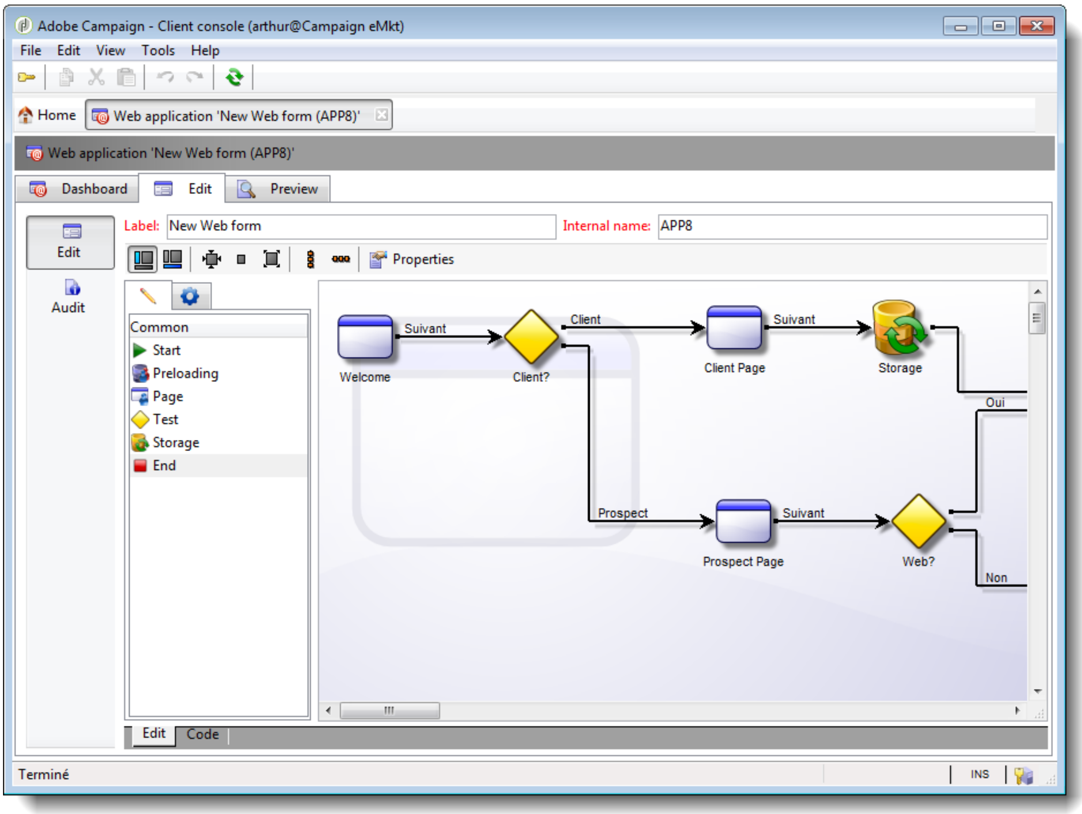
Select the Web form template (**newWebForm** by default).



This will take you to the dashboard of the form.



The **Edit** tab lets you create your content.



To define the configuration and content of the Web form, apply the following steps:

- Start by creating the required pages and checks: input fields, drop-down lists, HTML content, etc.
  This step is detailed below.
- Define page sequencing and condition the display.
  This step is detailed in Defining page sequencing [page 98].
- Translate the content if necessary.
  This step is detailed in Translating a form [page 132]

Creating the page content

The pages of the form are created via a specific editor which lets you define and configure input zones (text), selection fields (lists, checkboxes, etc.) and static elements (images, HTLM contents, etc.). They can be grouped into containers and their layout altered to suit your needs (for more on this, refer to Adding containers [page 83]).

The following sections detail how to define content and layout for form screens:

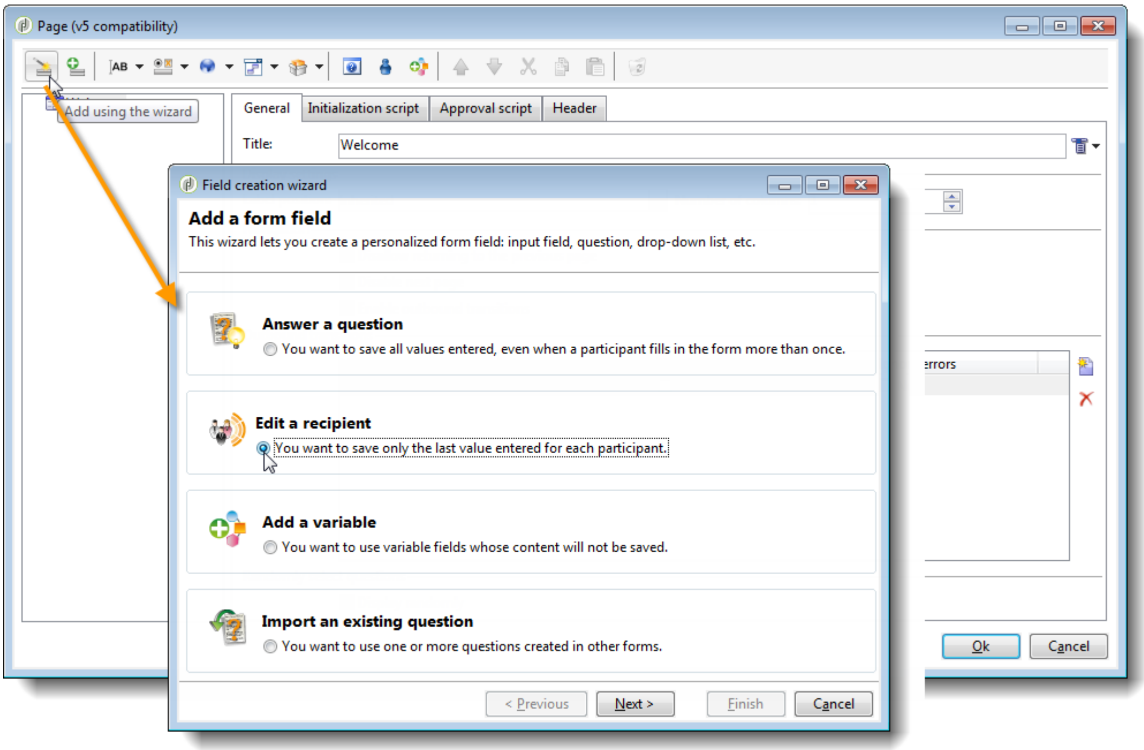
- Adding fields [page 51],
- Adding static elements [page 71],
- Adding containers [page 83],
- Configuring element layout [page 84].

Note:

- During page design, you can view the final rendering in the **Preview** tab. To view changes, save the form first. Any errors are displayed in the **Log** tab.
- To make sure page display and information storage occur in the appropriate sequence, enable debug mode in the Web form. To do this, go to the **Preview** sub-tab and check the **Enable debug mode** box: all collected information and possible execution errors will be displayed at the bottom of each page.

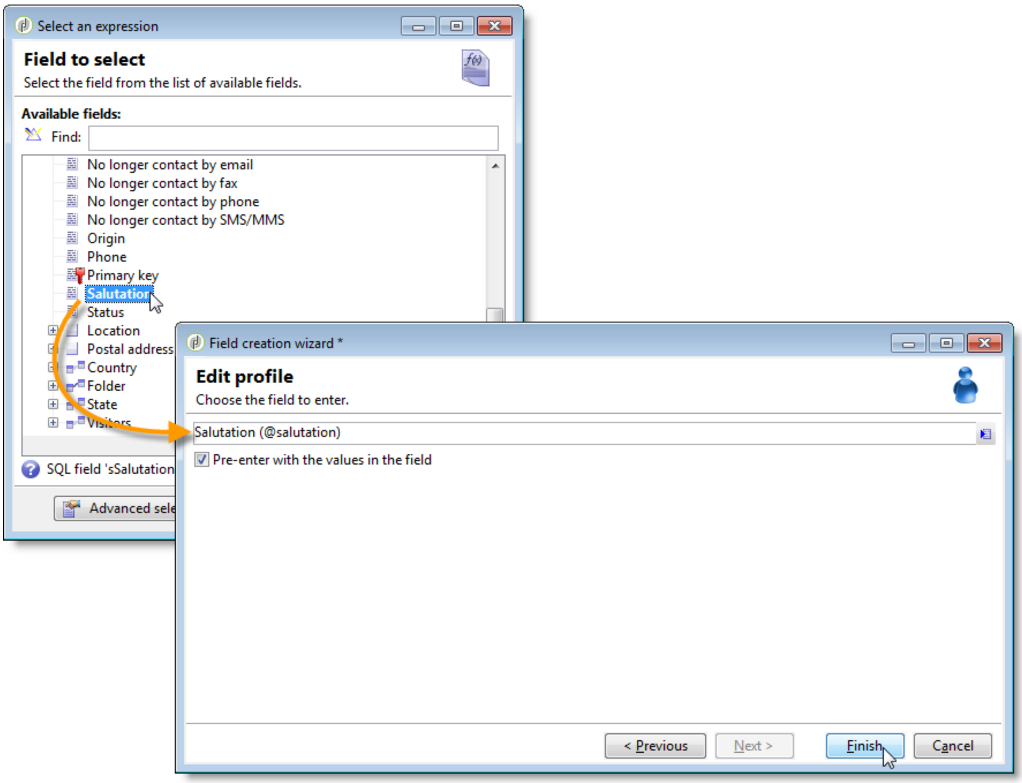
Field creation wizard

For each page of the form, you can add a field via the first button in the toolbar. To do this, go to the **Add using the wizard** menu.

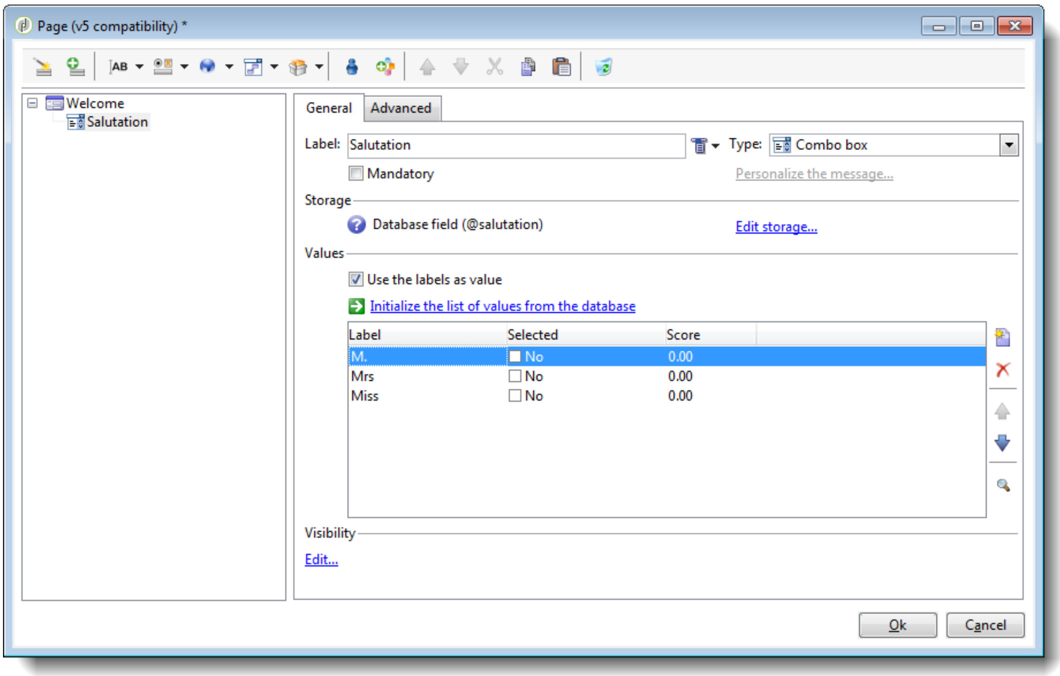


Select the type of field you want to create: you can choose to add a field in the database, a variable or to import a group of fields created in another form and collected in a container.

Click **Next** and select the storage field or variable, or the container you want to import.

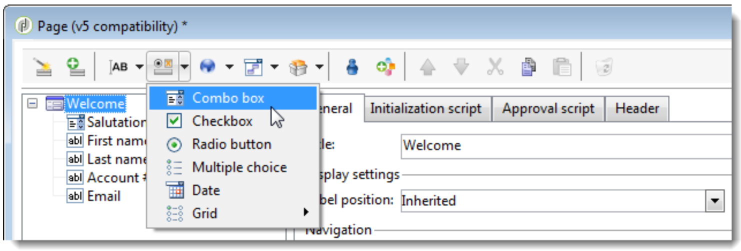


Click **Finish** to insert the selected field into the page.

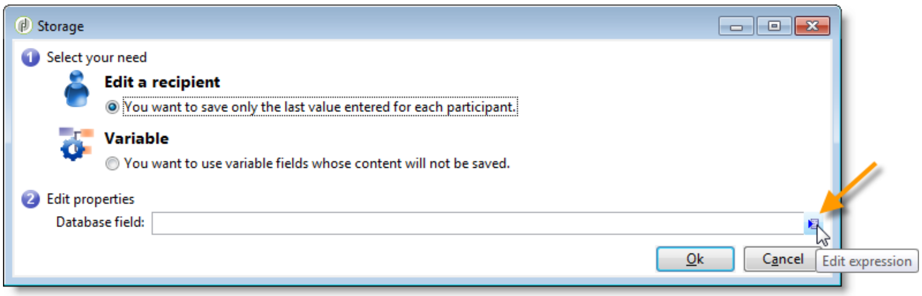


Using the icons in the toolbar

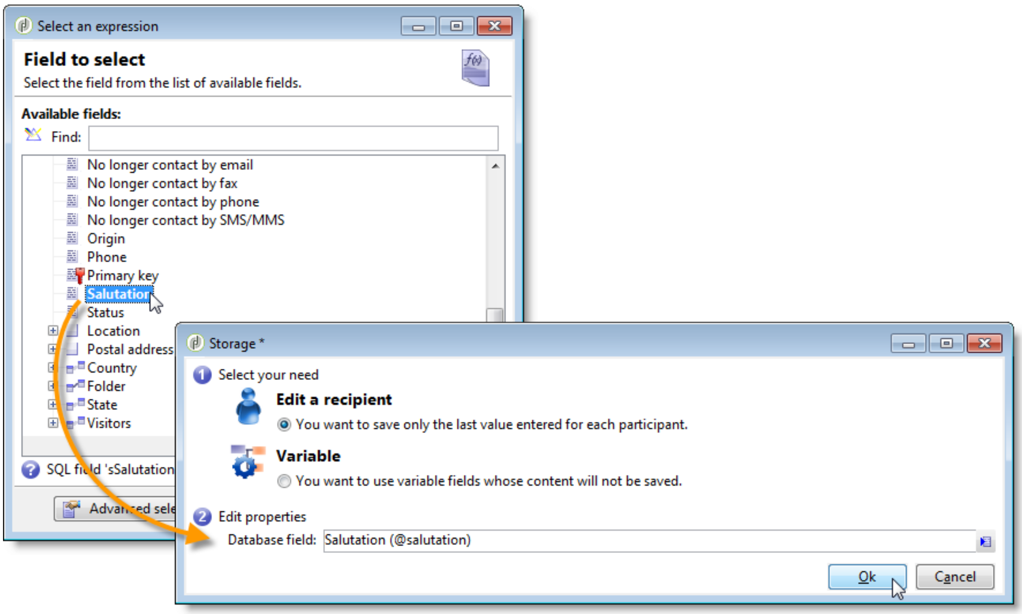
You can also use the icons in the toolbar or a right-click to insert an input zone.



In this case, start by selecting the type of field to add and the answer storage mode.



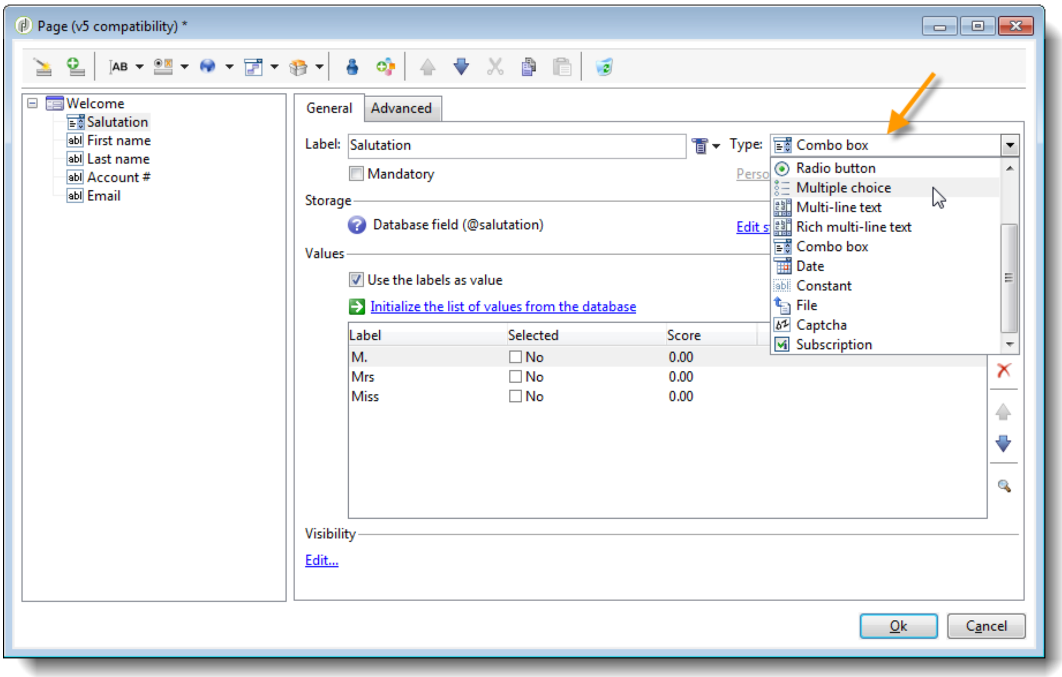
Click **Ok** to approve the selection.



Adding fields

In a Web form, fields enable users to enter information and select options. Web forms can offer input fields, selection fields, static and advanced content (captchas, subscriptions, etc.).

When you use the wizard to add fields, the field type is detected automatically based on the selected field or storage variable. You can edit it using the **Type** drop-down box in the **General** tab.



When using the buttons in the toolbar, select the type of field you want to add.

The following types of field are available:

- Text/number input. See Input fields [page 53].
- Selection from a drop-down list. See Lists [page 55].
- Multiple choice via checkboxes. See Checkboxes [page 58].
- Exclusive selection via radio buttons. See Radio buttons [page 61].
- Vote in an option grid. See Grid [page 62].
- Entering numbers and dates. See Dates and numbers [page 63].
- Subscribing to and unsubscribing from an information service. See Subscriptions [page 67].
- Check before approval via a captcha. See Captcha [page 68].
- Adding a download button. Uploading a file [page 70].
- Constant approval. See Constant [page 70].

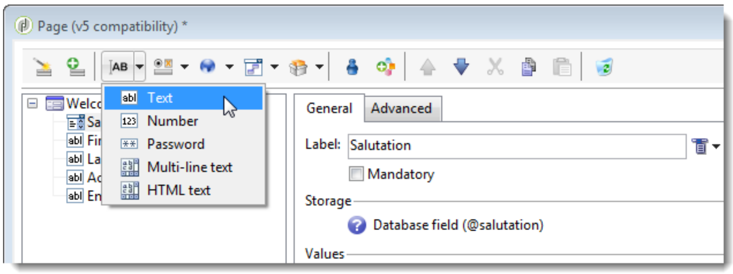
Please specify the answer registration mode: update a field in the database (stores only the last value saved) or store in a variable (the answer is not stored). For more on this, refer to Response storage fields [page 106].

Note:

By default, the field is inserted at the bottom of the current tree. Use the arrows in the toolbar to move it up or down.

Input fields

To add an input field, click the **Input control** button and choose the type of field you want to add.



Types of input fields

Five different types of text fields can be inserted into a form page:

- **Text**: lets the user enter a text on one line.

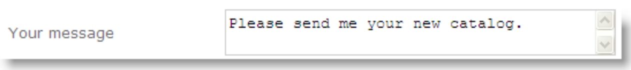
- **Number**: lets the user enter a number on one line. for more on this, refer to Numbers [page 65].

  When the page is approved, field content is checked to make sure the value entered is compatible with the field. For more on this, refer to Defining check and approval settings [page 93].
- **Password**: lets the user enter text on a single line. During text entry, the characters are replaced by periods:

Warning:

Passwords are stored unencrypted in the database.

- **Multi-line text**: lets the user enter text on several lines.

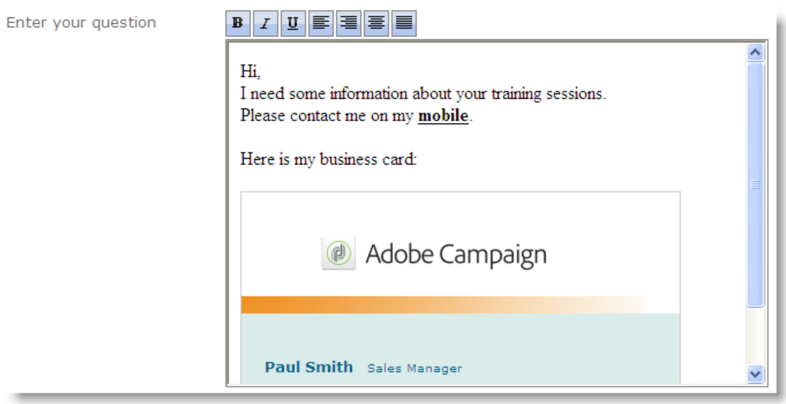


Warning:

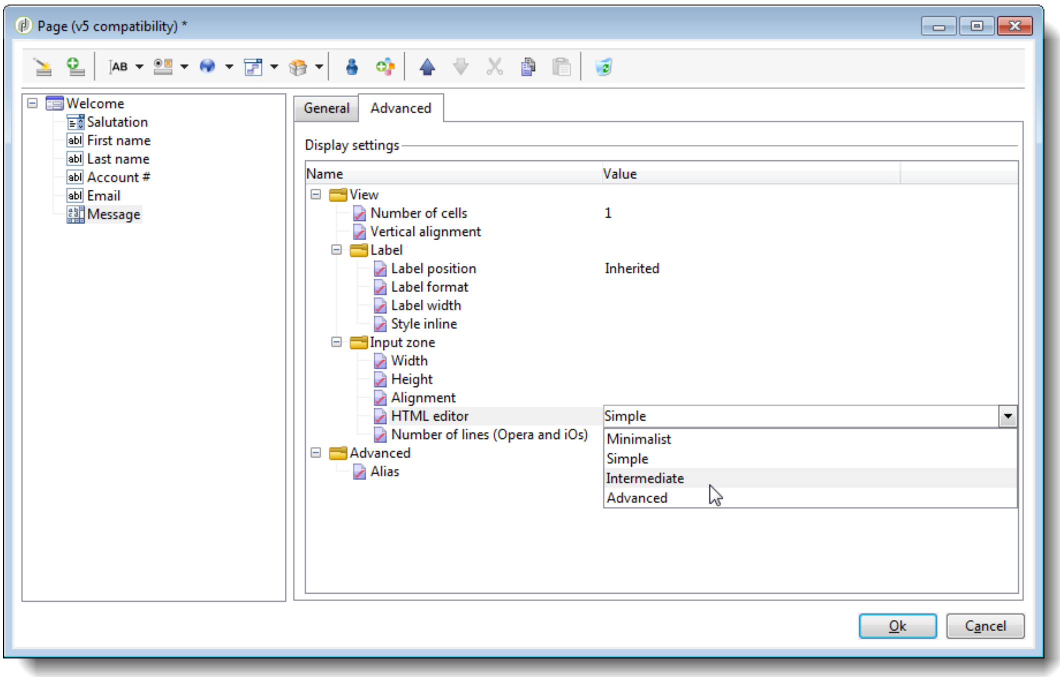
Multi-line text fields are specific fields that can contain carriage returns. Their storage space must be associated with a field mapped on an XML element, not an XML attribute. For more on the types of data in schemas, refer to the "Schema reference" chapter in the Configuration guide.

If you are using the **Survey** module, you can store this type of field in an archived field which will automatically adapt to the format. For more on this, refer to Overview [page 187].

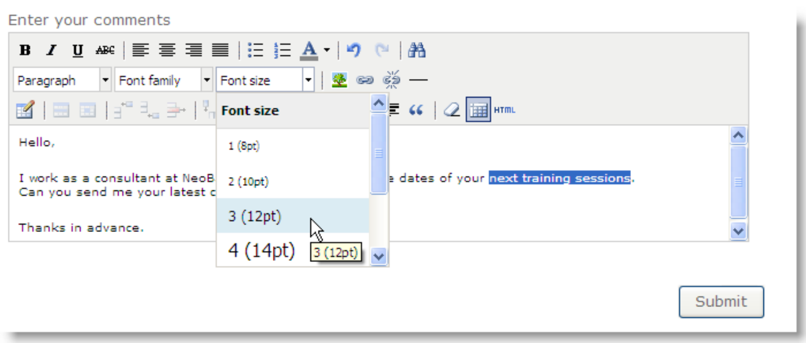
- **Enriched multi-line text**: lets the user enter text with a layout which will be stored in HTML format.



You can select the type of editor offered to users. To do this, use the drop-down box of the **HTML editor** field in the **Advanced** tab.

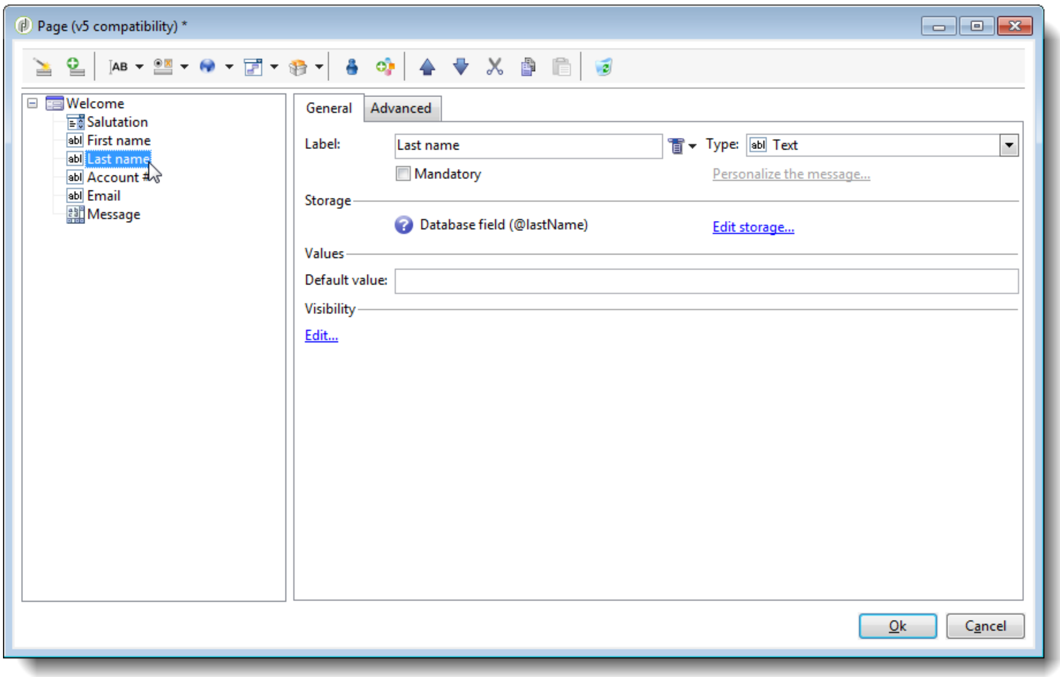


The number of icons displayed varies depending on the type of editor. For an **Advanced** editor, the rendering will be as follows:



Configuring input fields

Input fields are all configured based on the same mode, using the following options:



The **General** tab lets you enter the name of the field and attribute a default value to it if necessary.

The answer storage mode can be altered via the **Edit storage...** link. Values can be stored in an existing field of the database; or you can choose not to save information in the database (use a local variable).

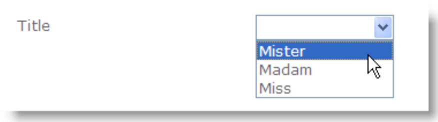
Note:

Storage modes are detailed in Response storage fields [page 106]

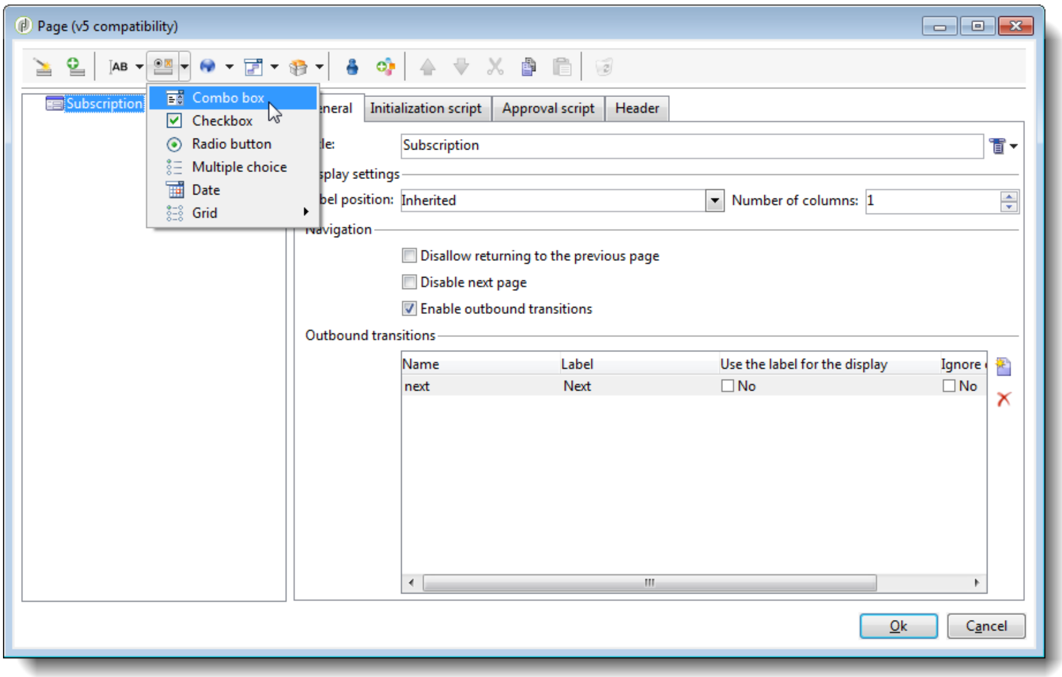
The **Advanced** tab lets you define display parameters for the field (position of labels, alignment, etc.). See Configuring element layout [page 84].

Lists

You can insert a drop-down list into a survey page. This lets the user select a value from those on offer in a drop-down menu.

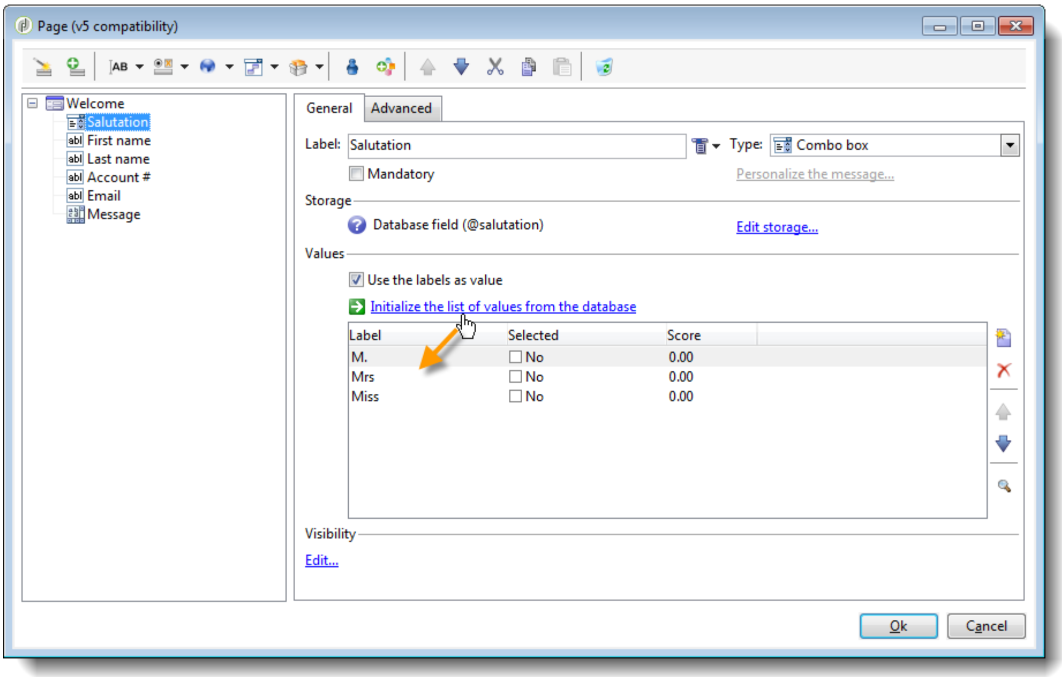


To add a drop-down box to a form page, click the **Selection controls** > **Drop-down list** button in the toolbar of the page editor.



Select the answer storage mode and confirm your choice.

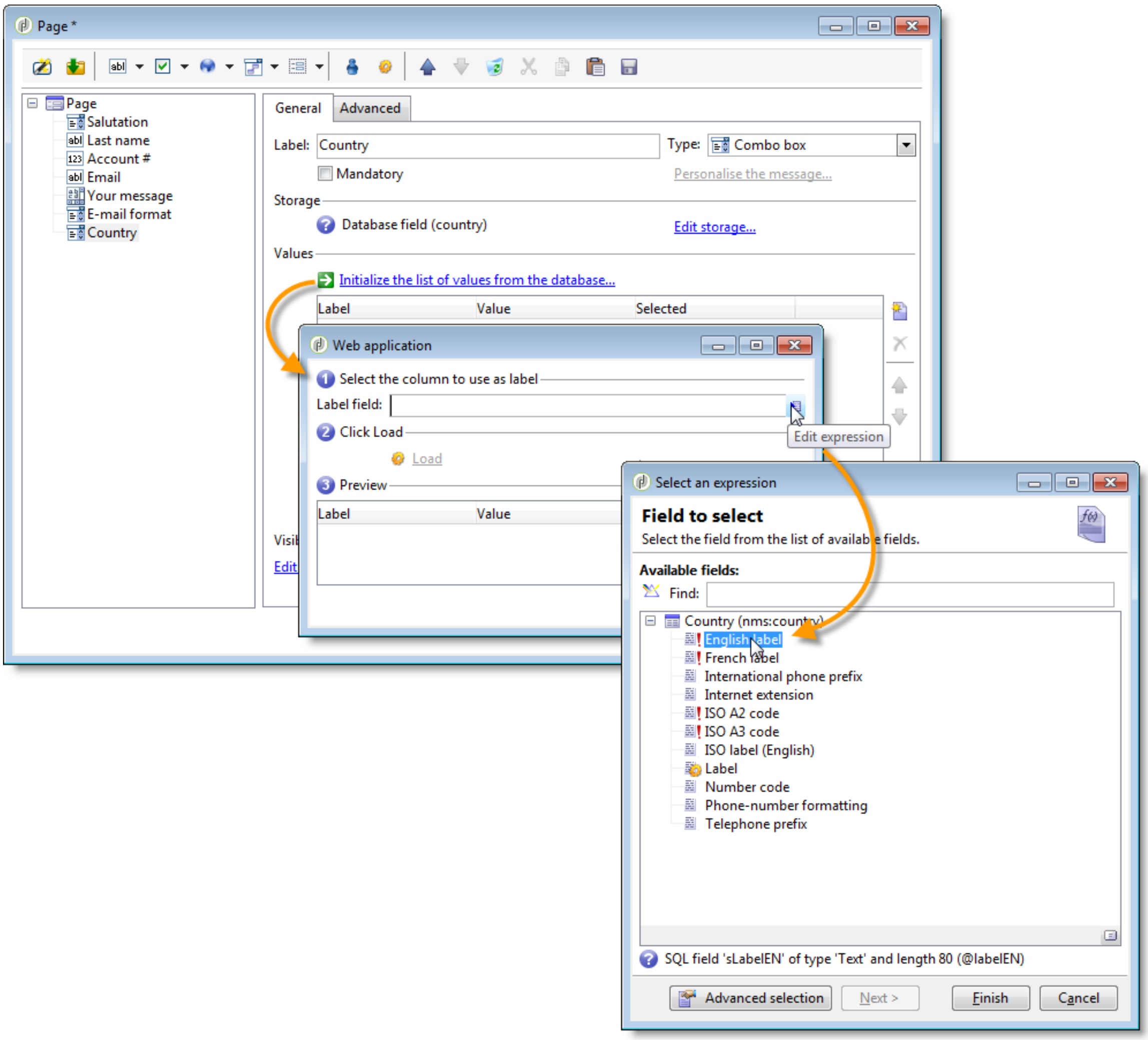
Define the labels and values of the list in the lower section of the **General** tab. If the information is stored in an existing field of the database and it is an enumeration field, you can fill in the values automatically by clicking **Initialize the list of values from the database**, as shown below:



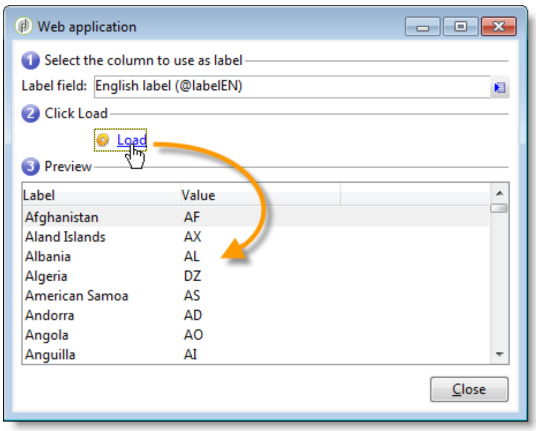
Note:

Use the arrows to the right of the list of values to change their sequence.

If the data is stored in a linked table, you can select the field where the values to be suggested in the list are saved. For example, if you select the table of countries, click **Initialize the list of values from the database...** and select the desired field.



Next, click the **Load** link to retrieve the values:

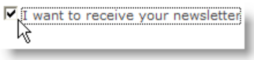


Warning:

Repeat this operation whenever the list is updated to refresh the values on offer.

Checkboxes

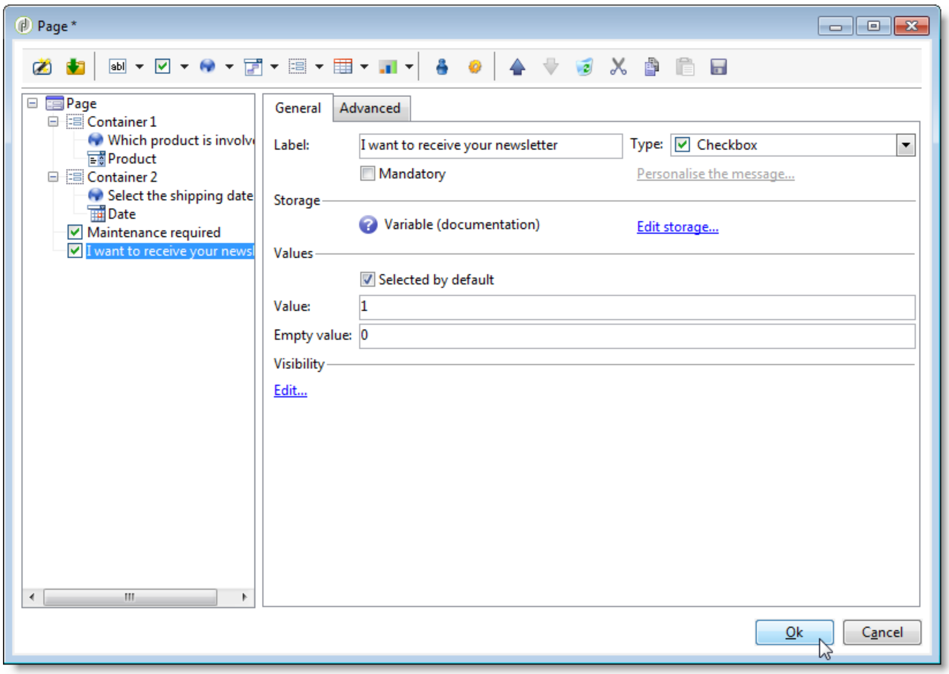
In order for the user to select an option, you need to use a checkbox.



To add a checkbox to a form, click the **Selection controls** > **Checkbox...** icon in the toolbar of the page editor.

Select the answer storage mode and confirm your choice.

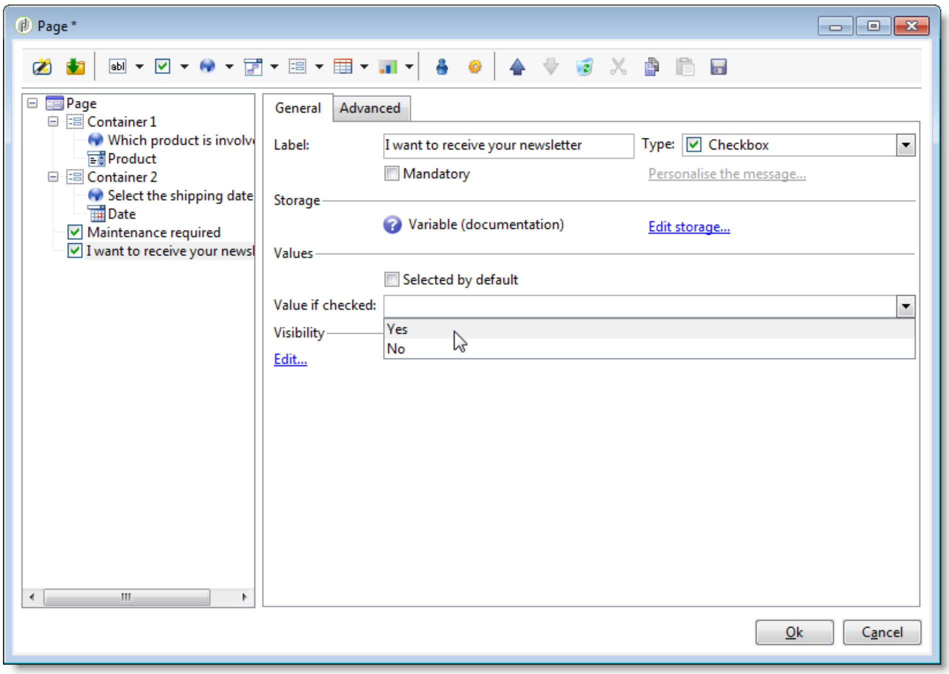
Enter the label of the box in the **Label** field of the **General** tab.



A checkbox lets you assign a value to the storage field (or value) depending on whether or not the box is checked. The **Values** section lets you enter the value to assign if the box is checked (in the **Value** field), and the value to assign if it is not checked (in the **Empty value** field). These values depend on the data storage format.

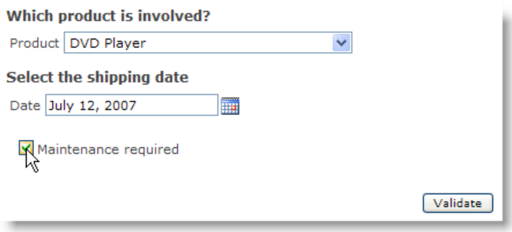
Note:

If the storage field (or variable) is boolean, the value to assign if the box is not checked will be deduced automatically. In this case, only the **Value if checked** field is offered, as shown below:

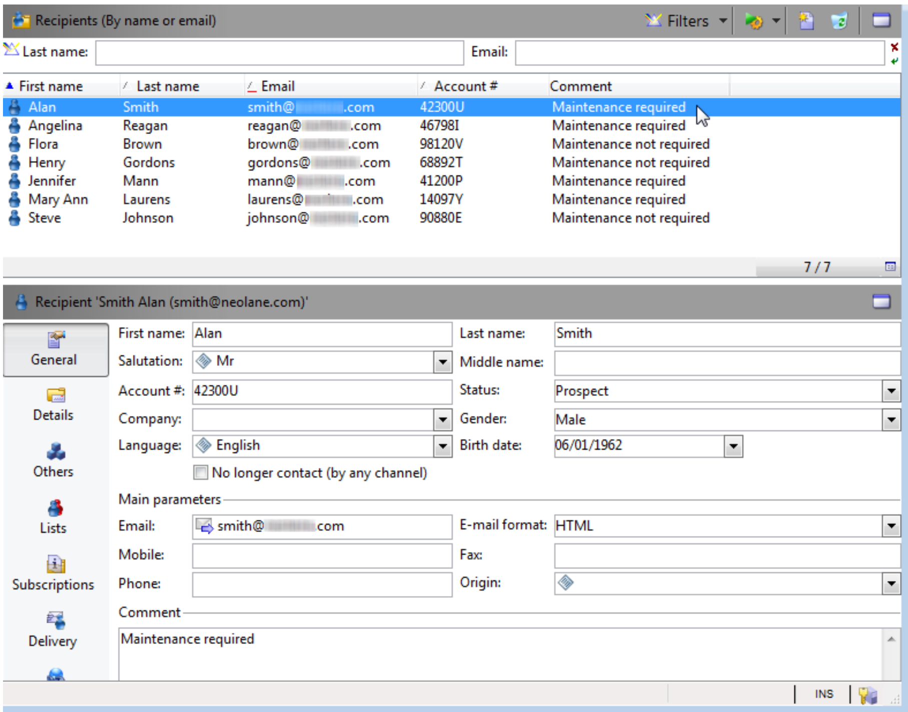


Example: Assigning a value to a field if a box is checked

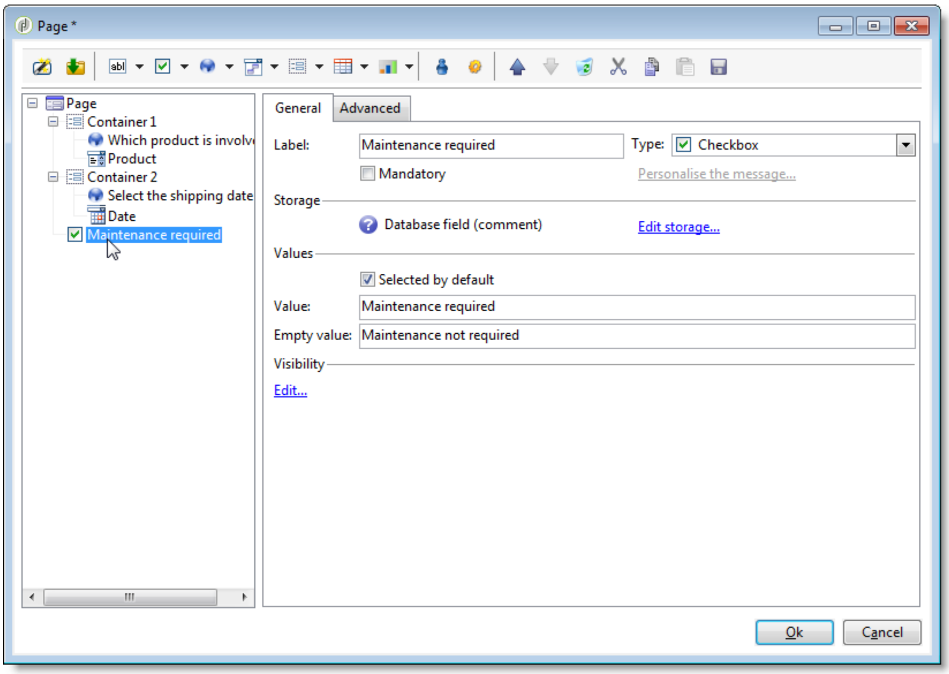
We want to insert a checkbox into a form to send a maintenance request, as shown below:



The information will be uploaded to the database and into an existing field (in this case, the **Comment** field):

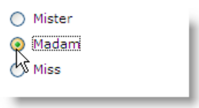


If the "Maintenance required" box is checked, the **Comment** column will contain "Maintenance required". If the box isn't checked, the column will show "Maintenance not required". To obtain this result, apply the following configuration to the checkbox on the form page:



Radio buttons

Radio buttons let you offer the user a series of exclusive options to choose from. These are different values for the same field.



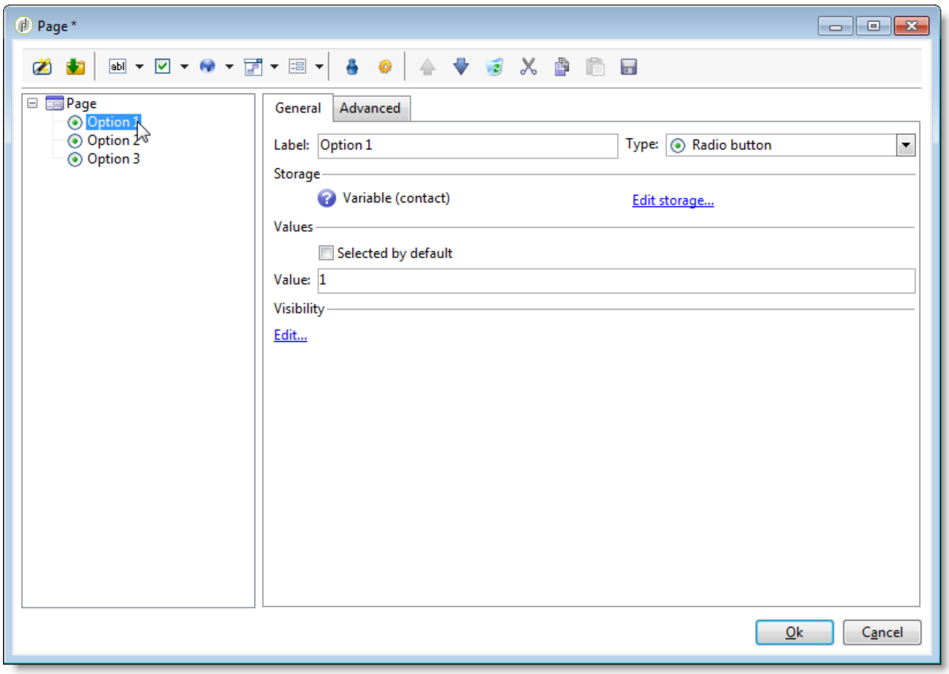
You can create radio buttons individually (unit buttons) or via a multiple-choice list, but since the point of the radio buttons is to select one option or another, we will always create at least a pair of radio buttons, never just a single button.

Warning:

To make selection mandatory, you need to create a multiple choice list.

Creating each button individually

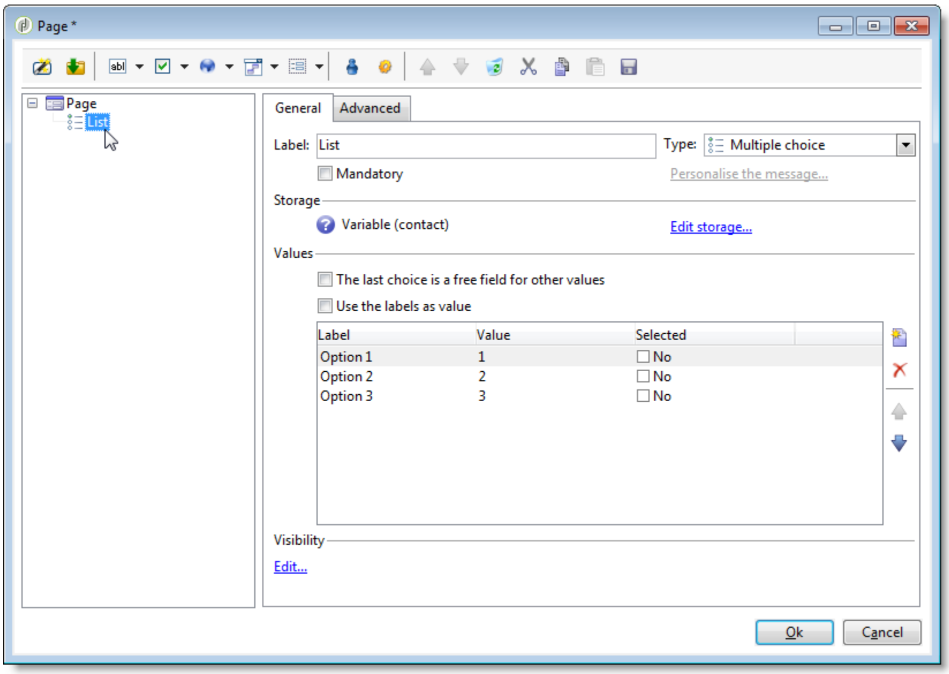
To add a radio button to a form page, go to the **Selection controls** > **Radio button** menu in the toolbar of the page editor and choose a storage mode.



Radio buttons are configured in a similar way to checkboxes (see Checkboxes [page 58]). However, no value is assigned if the option is not selected. In order for several buttons to be interdependent, i.e. selecting one automatically deselects the others, they must be stored in the same field. If they are not stored in the database, the same local variable must be used for temporary storage. See Response storage fields [page 106].

Creating a list of buttons

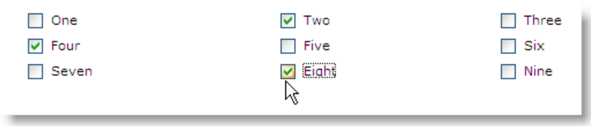
To add radio buttons via a list, go to the **Selection controls>Multiple choice** menu in the toolbar of the page editor.



Add as many radio buttons as there are labels. The advantage of this feature is that you can import values from an existing field (in case of an itemized field) and make it mandatory for the user to choose one option. However, the layout of buttons is less flexible.

Note:

Web forms don't authorize the selection of several values. Multiple selection may only be activated for **Survey** type forms.

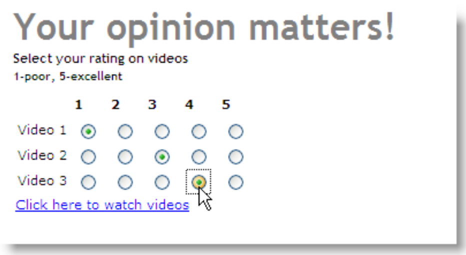


For more on this, refer to Overview [page 187].

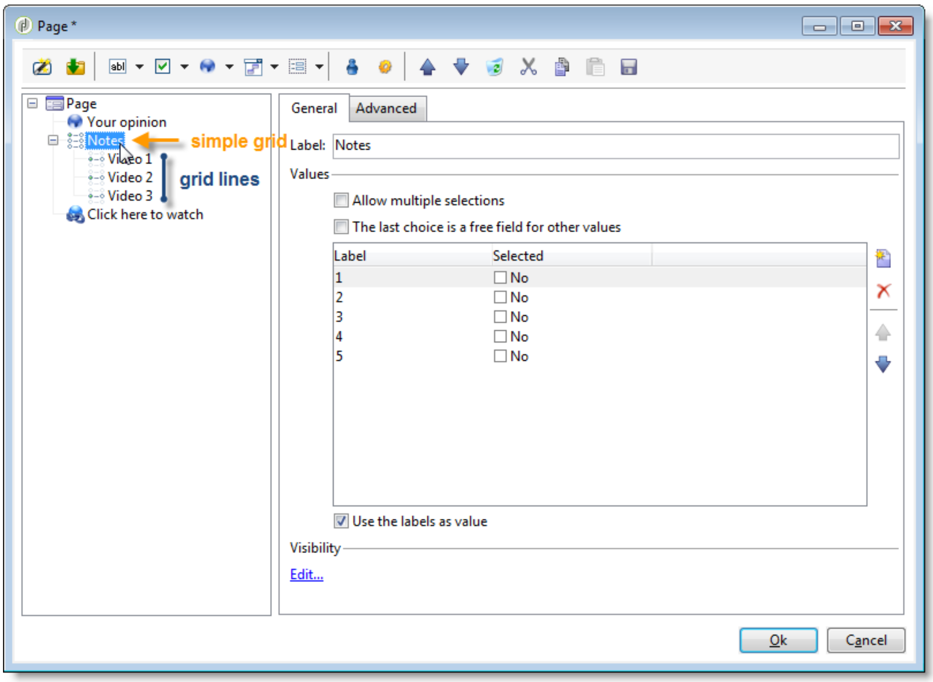
It is possible, however, to insert a **Multiple choice** type field into a Web application; but without authorizing the selection of several values: the options offered can be selected using radio buttons.

Grid

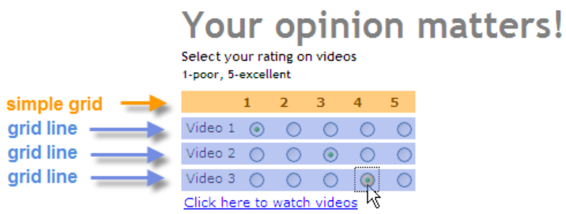
Grids are used to design voting pages in Web applications. This lets you offer lists of radio buttons for answering survey or assessment type Web forms, as shown below:



To use this type of element in a form, create a simple grid and add a line for each element to be assessed.



The number of radio buttons in each line of the grid matches the number of values defined in the simple grid.



Only one option can be selected per grid line.

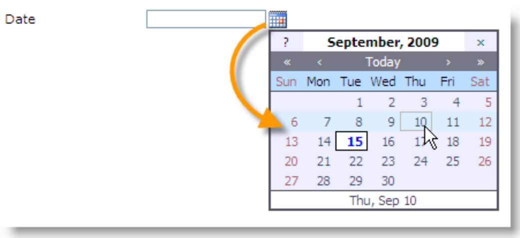
Note:

In our example, the label of the grid is hidden. To do this, go to the **Advanced** tab, the **Label position** display is defined as **Hidden**. See Defining the position of labels [page 87].

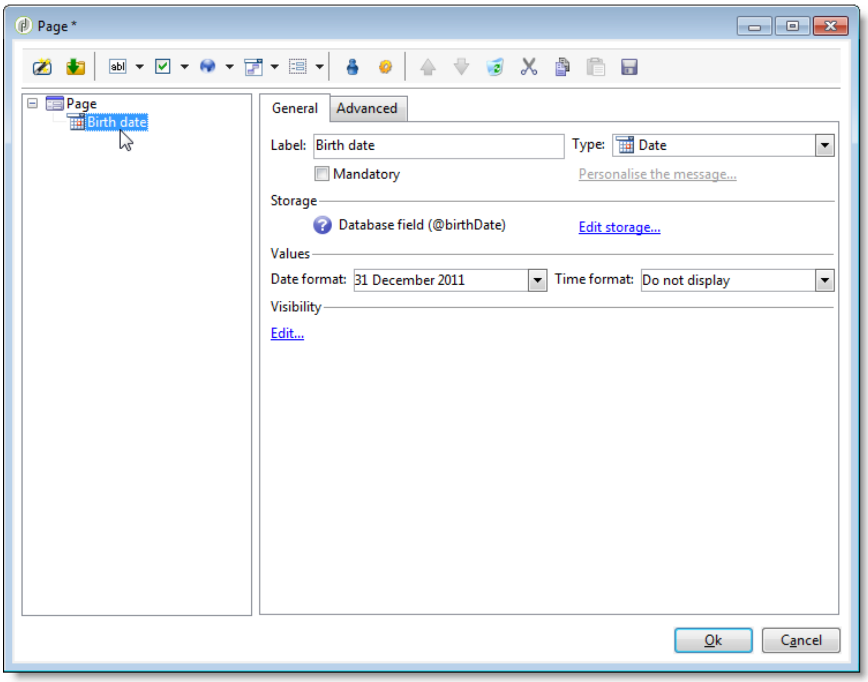
Dates and numbers

The content of the form fields can be formatted to match the data stored in the database or to satisfy a particular requirement. You can create suitable fields for the entry of numbers and dates.

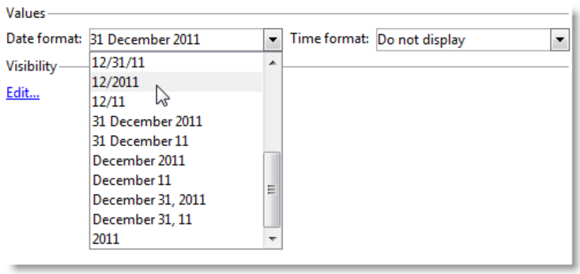
Dates



To allow the user to enter a date in a form page, select **Add input field** > **Date...** in the toolbar or page editor. Enter a label for the field and configure the data storage mode.



The lower section of the window lets you select the date and time formats for the values stored in this field.



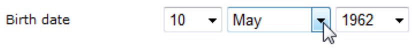
You can also choose not to display the date (or time).

Dates can be selected via a calendar or drop-down boxes. You can also enter them directly in the field, but they need to match the format specified in the screen above.

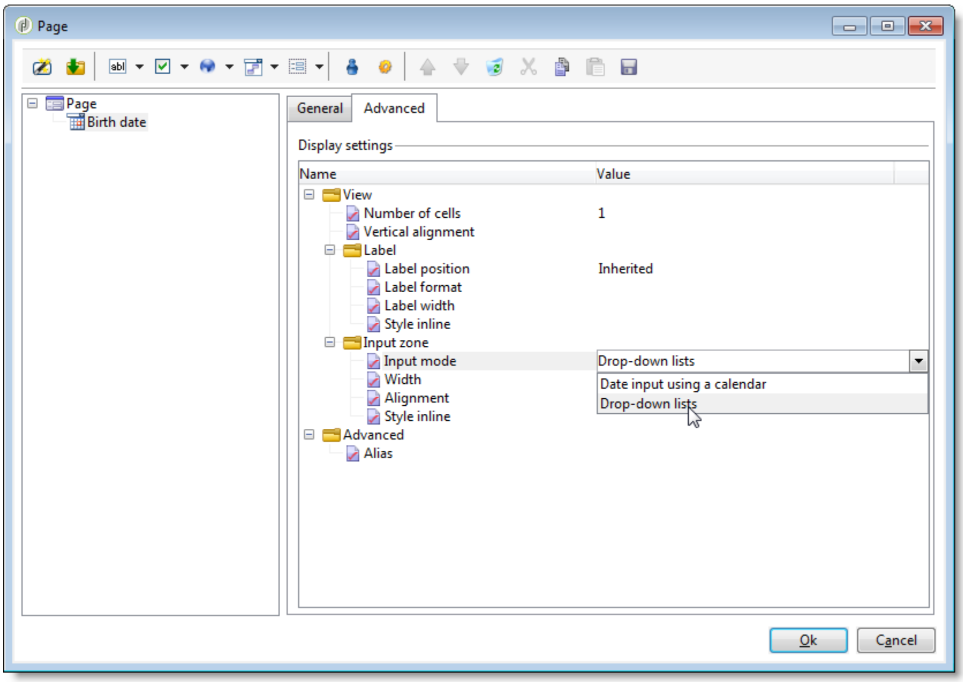
Note:

Date entry format

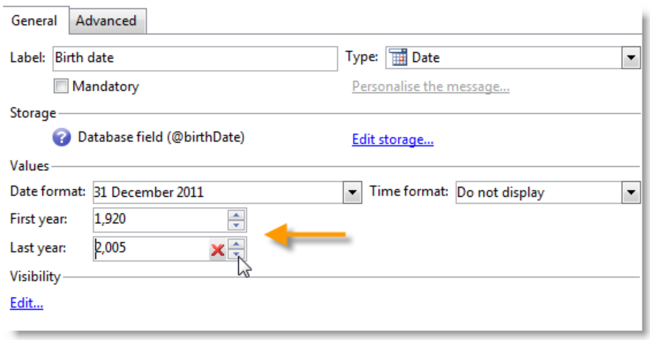
- By default, dates used in forms are entered via a calendar. For multilingual forms, please check that calendars are available in all the languages used. See Translating a form [page 132].
- However in some cases, (for entering dates of birth, for instance) it may be easier to use drop-down lists.



To do this, click the **Advanced** tab and choose the input mode using **Drop-down lists**.



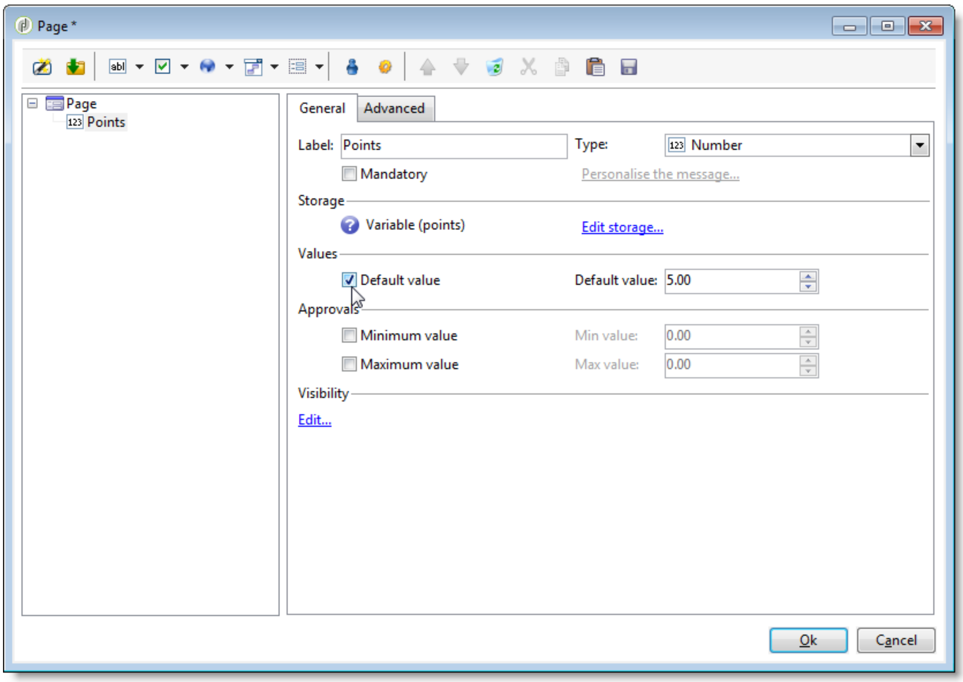
You can then set limits to the values offered in the list.



Numbers

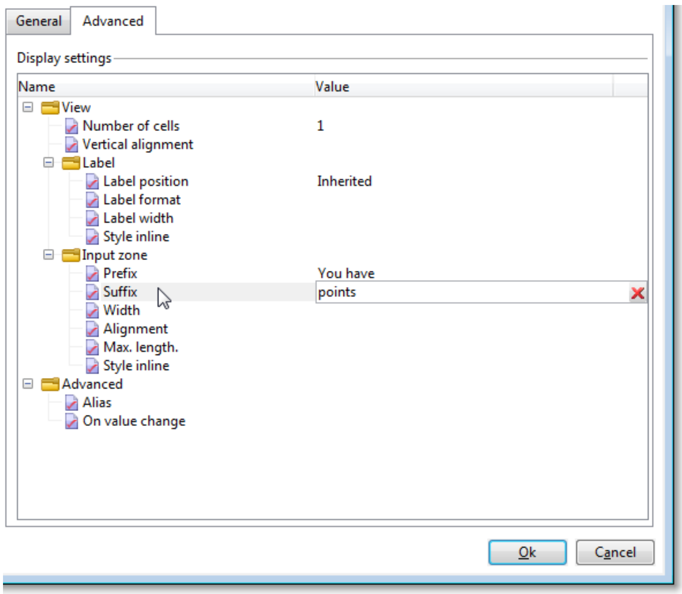
In a numeric field, the user can enter numbers only. Entry control is applied automatically when the page is approved.

Depending on the field in which data is stored in the database, special formatting or certain restrictions may be applied. You can also specify maximum and minimum values. This type of field is configured as follows:

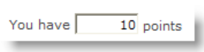


The default value is the value displayed in the field when the form is published. It can be corrected by the user.

You can add a prefix and/or suffix to the numeric field via the **Advanced** tab, as shown below:



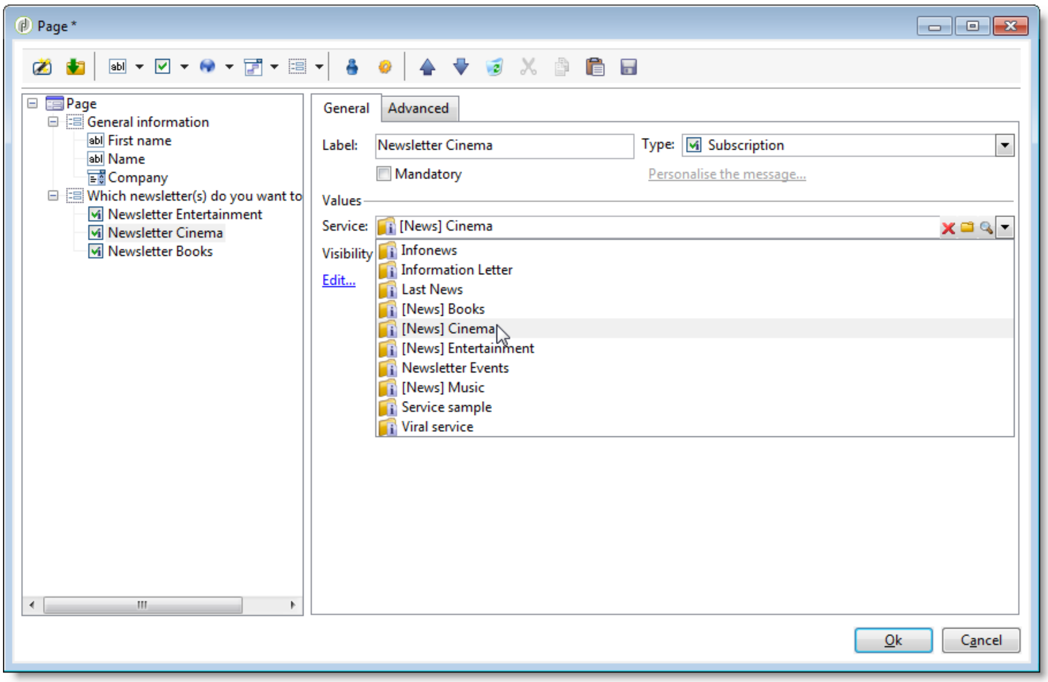
In the form, the rendering will be as follows:



Subscriptions

You can add controls to allow users to subscribe to or unsubscribe from one or more information services (newsletters, warnings, real-time notifications, etc.). To subscribe, the user checks the corresponding service.

To create a subscription checkbox, click **Advanced controls>Subscription**.

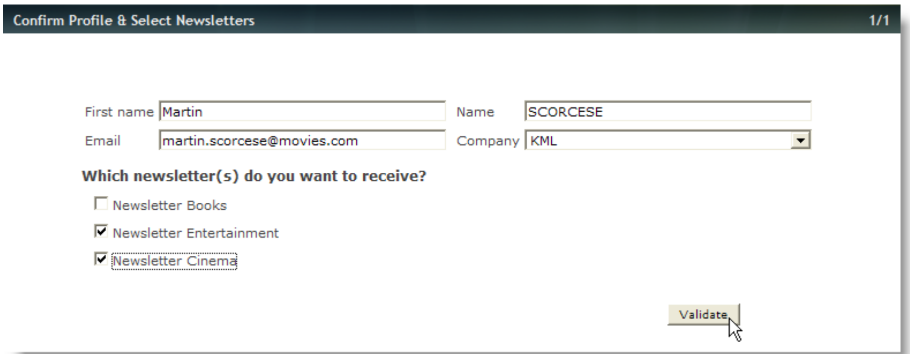


Indicate the label for the checkbox and select the information service concerned using the **Service** drop-down box.

Note:

Information services are detailed in the "Information services and sponsoring" chapter of the Delivery guide.

The user subscribes to the service by checking the relevant option.



Warning:

If the user is already subscribed to an information service and the box linked to this service isn't checked when they approve the form, they will be unsubscribed.

Examples of subscriptions and referrals are available in Overview [page 187].

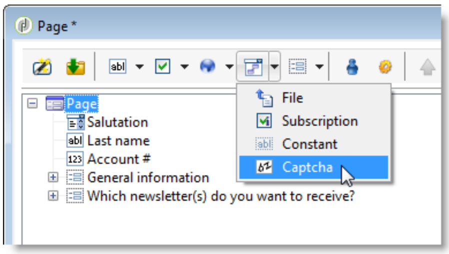
Captcha

The purpose of **captcha** tests is to prevent fraudulent use of your Web forms.

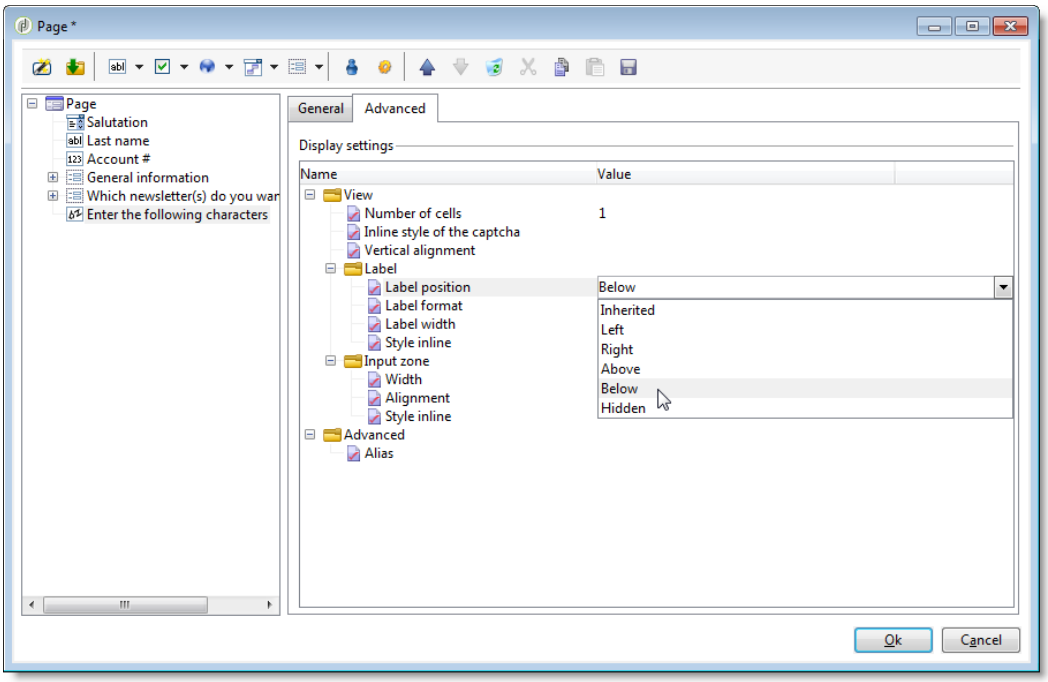
Warning:

If your form contains several pages, the Captcha must always be placed on the last page, just before the storage box, to prevent any circumvention of the security measures.

To insert a Captcha into a form, click the first button on the toolbar and Select **Advanced controls>Captcha**.



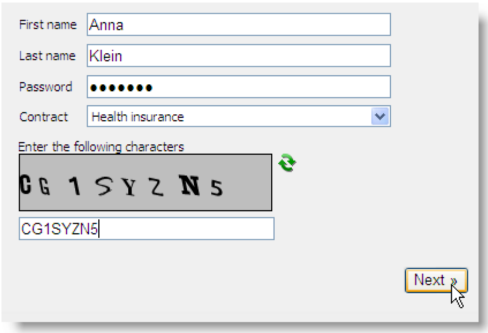
Enter the label of the field. This label will be displayed in front of the Captcha display area. You can change the position of this label in the **Advanced** tab.



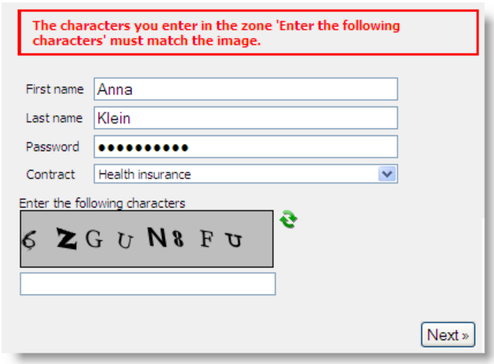
Note:

For **captcha** type controls, there is no need to indicate a storage field or variable.

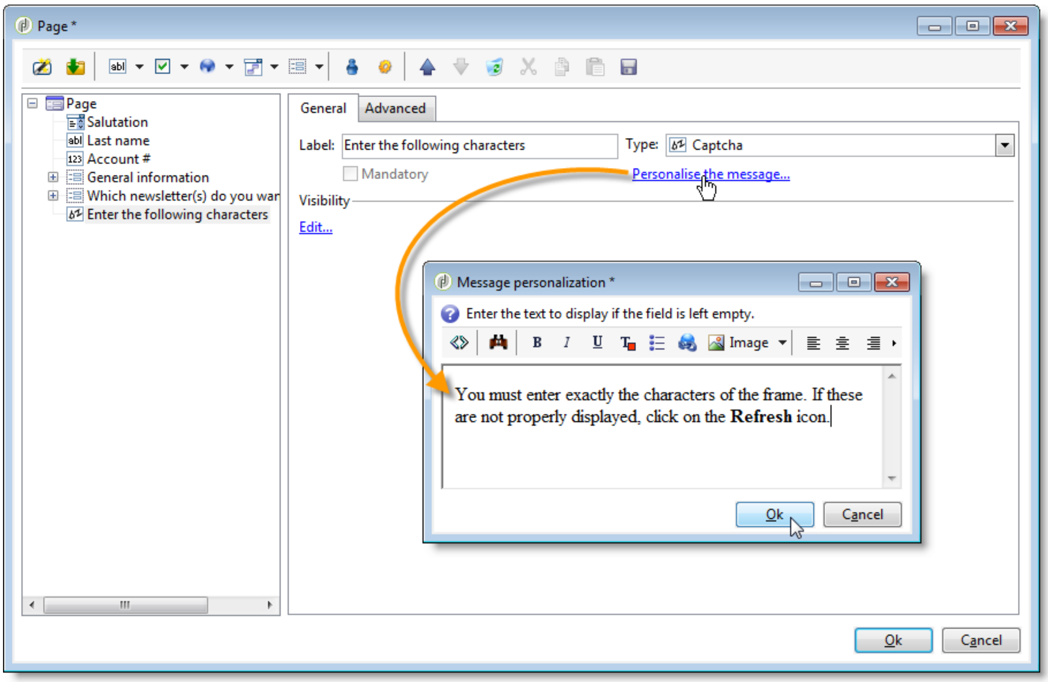
The Captcha is inserted into the page with an input field placed under the visual. These two elements are inseparable and are considered as a single item for the purpose of page layout (they occupy a single cell).



When the page is confirmed, the input field is displayed in red if the content of the Captcha was not entered correctly.



You can create an error message to display. To do that, use the **Personalize the message** link in the **General** tab.



> **Note:**
>
> Captchas are always 8 characters long. You cannot modify this value.

Uploading a file

You can add an upload field to a page. This functionality can be useful for intranet file sharing, for instance.

To insert an upload field to a form page, select the **Advanced controls > File...** menu in the toolbar of the page editor.

By default, the uploaded files are stored in resource files accessible via the **Resources > Online > Public resources** menu. You can use a scrip to change this behavior. This script can use the functions defined in the jsapi.chm file provided by Adobe Campaign, including those that concern file manipulation.

You can store the link to these files in a local variable or in a database field. For example, you can extend the recipient schema to add a link to file-based resources.

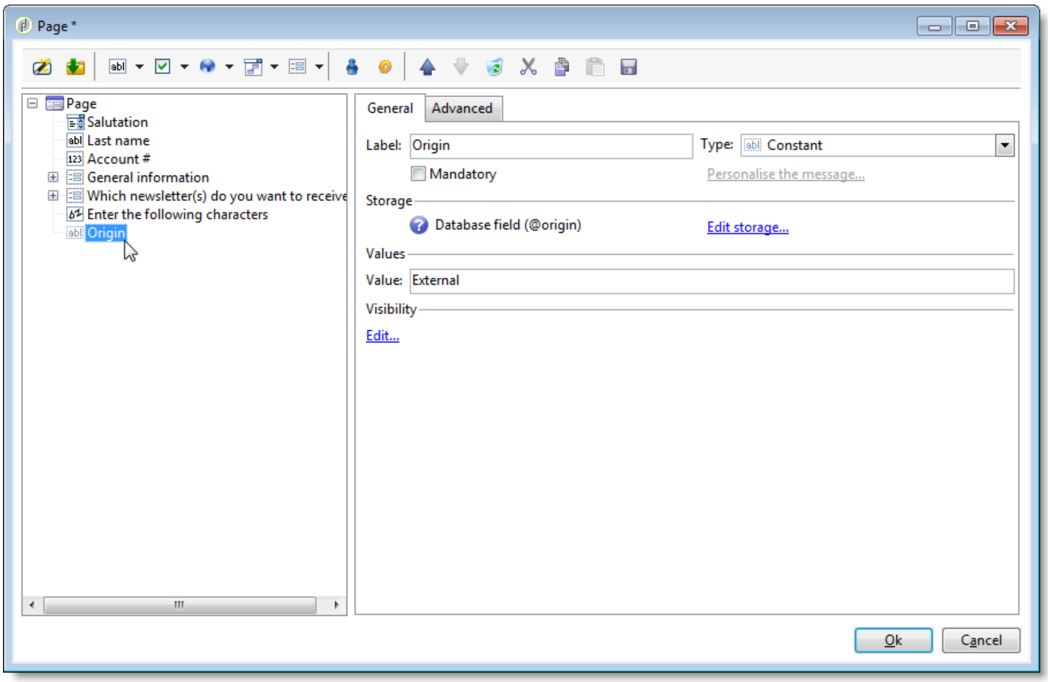
> **Warning:**
>
> - This type of file must be reserved for forms with secure access (using credentials).
> - Adobe Campaign does not control the size or the type of resource uploaded: we therefore highly recommend using upload fields for secure type intranet sites only.
> - If several servers are linked to the instance ('load balancing'), you need to make sure calls to the Web form arrive on the same server.
> - These implementations require the assistance of the Adobe Campaign Consulting team.

Constant

You can highlight a field when the user passes on one of the pages of the form. To do this, place a constant in the page and specify the value and the storage location.

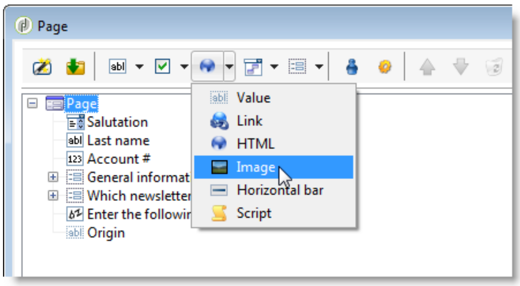
This field is not visible to the user, but can be used to enrich the data in the user profile.

In the following example, the **origin** file of the recipient profile is filled in automatically whenever a user approves this page. The constant is not displayed on the page.



Adding static elements

You can include elements with which the user has no interaction in the pages of the form; these are static elements such as images, HTML content, a horizontal bar, or a hypertext link. These elements are created via the first button in the toolbar, by clicking the **Add static element** menu.



The following types of field are available:

- Value based on previously provided answers (in the context of the form) or on the database.
- Hypertext link, HTML, horizontal bar. See HTML content [page 71].
- Image saved in the resource library or on a server accessible by users. See Images [page 82].
- Script executed on client side and/or server side. It must be written in JavaScript and be compatible with most browsers to ensure correct execution on the client side.

Note:

On the server side, the script can use the functions defined in the **`jsapi.chm`** file supplied by Adobe Campaign.

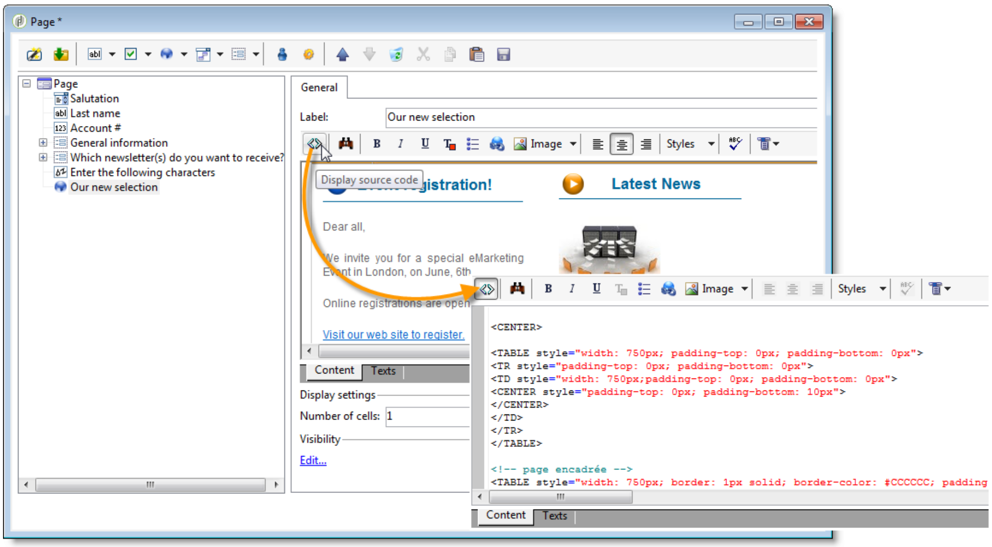
HTML content

You can include HTML content in a form page: hypertext links, images, formatted paragraphs, video or Flash objects, etc.

Inserting HTML

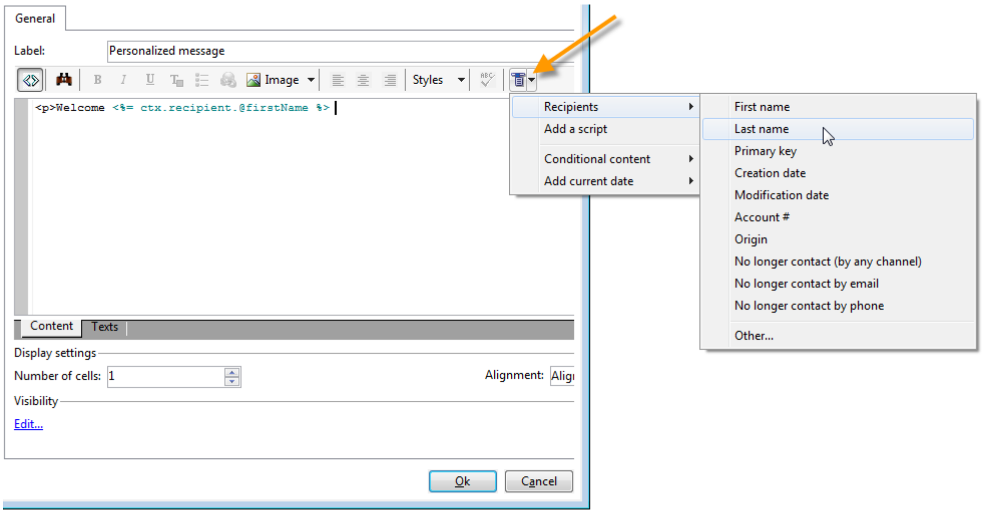
The HTML editor lets you enter the content to insert into the form page. To open the editor, go to **Static elements>HTML**.

You can enter and format your content directly or display the source code window to paste in some external content. To switch to "source code" mode, click the first icon in the toolbar:



Note:

- To insert a database field, use the personalization button.

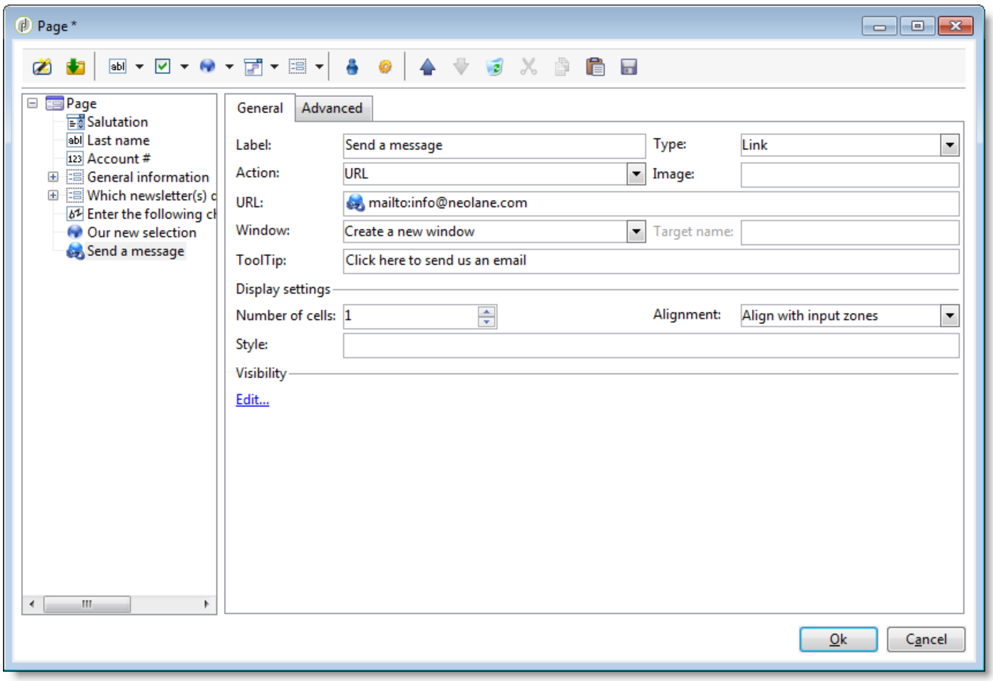


- The strings entered in the HTML editor are only translated if they are defined in the **Texts** sub-tab. Otherwise they will not be collected. For more on this, refer to Translating a form [page 132].

Inserting a link

Fill in the fields in the editing window as shown in the following example:

To add a hypertext link, go to **Static elements>Link**.



- The **Label** is the content of the hypertext link as it will be displayed on the form page.
- The **URL** is the desired address, e.g.: http://www.adobe.com for a website, or mailto:info@adobe.com to send a message.
- The **Window** field lets you select the display mode for the link in the case of a site. You can decide to open the link in a new window, the current window, or another window.

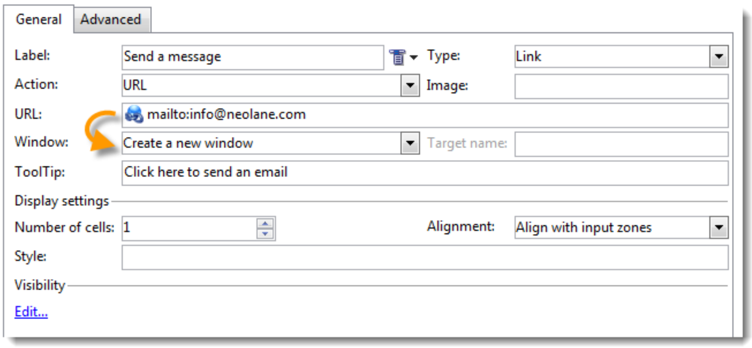
- You can add a ToolTip, as shown below:

Note:

You can choose to display the link as a button or an image. To do this, select the type of display in the **Type** field.

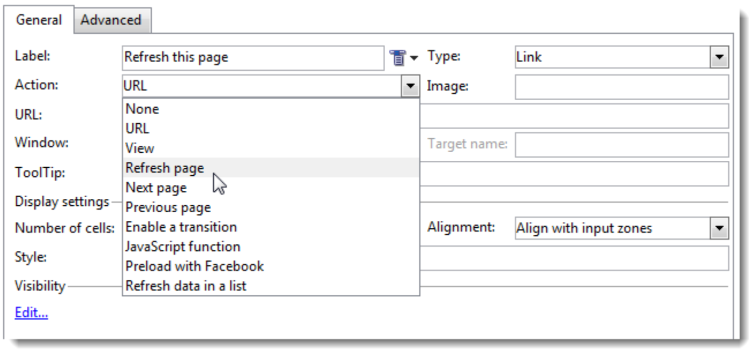
Types of links

By default, the links are associated with a URL-type action, so that a link destination address can be entered in the URL field.



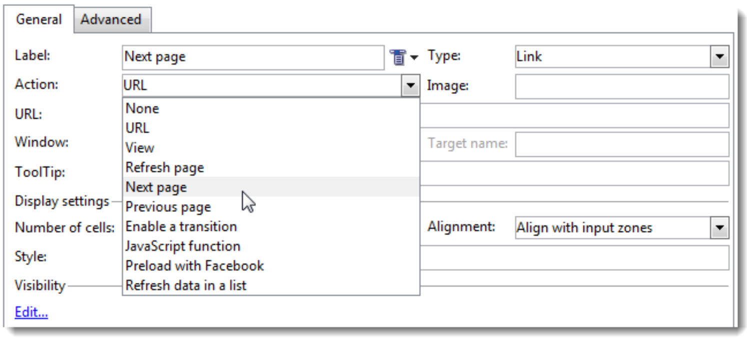
You can define other actions for the link, so that the user can click the link to do the following:

- Refresh the page
  To do this, select the **Refresh page** option in the drop-down box of the **Action** field.



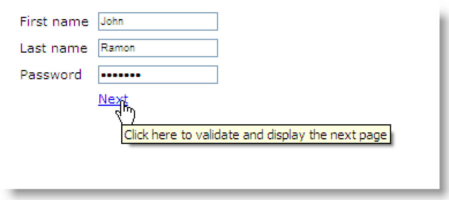
- Display the next/previous page

To do this, select the **Next page** or **Previous page** option in the drop-down box of the **Action** field.



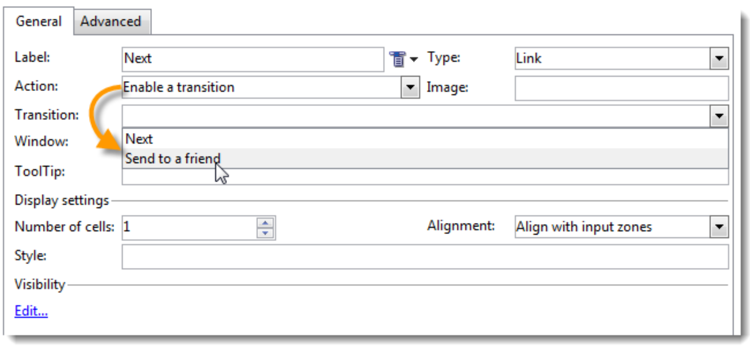
You can hide the **Next** and/or **Back** buttons if they are to be replaced by a link. See Defining page sequencing [page 98].

The link will replace the **Next** button used by default.

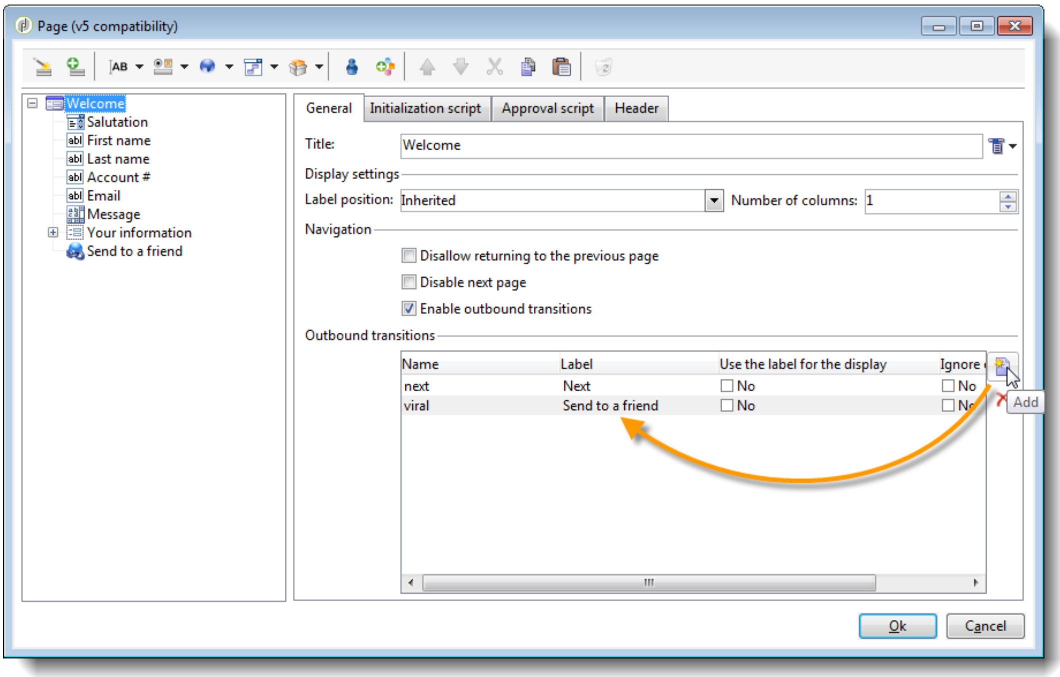


- Display another page

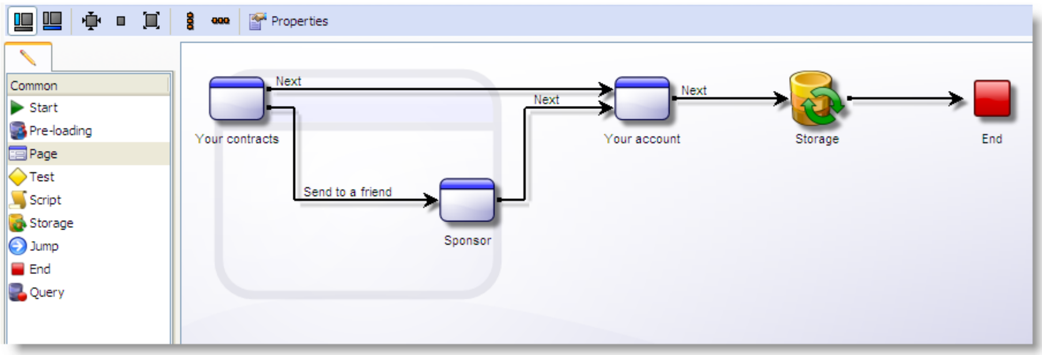
  The **Enable a transition** option lets you display a specific page associated with the outgoing transition selected in the **Transition** field.



By default, a page has only one output transition. To create new transitions, select the page and then click the **Add** button in the **Output transitions** section, as shown below:



In the diagram, this addition will look like this:



Note:

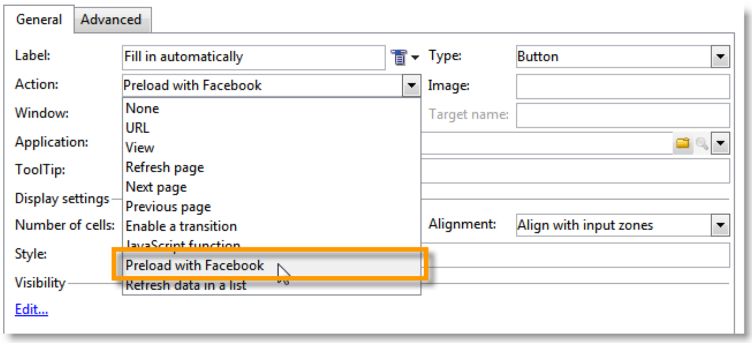
For more on page sequencing in a Web form, refer to Defining page sequencing [page 98].

- Preload the fields of the form with data taken from the Facebook profile

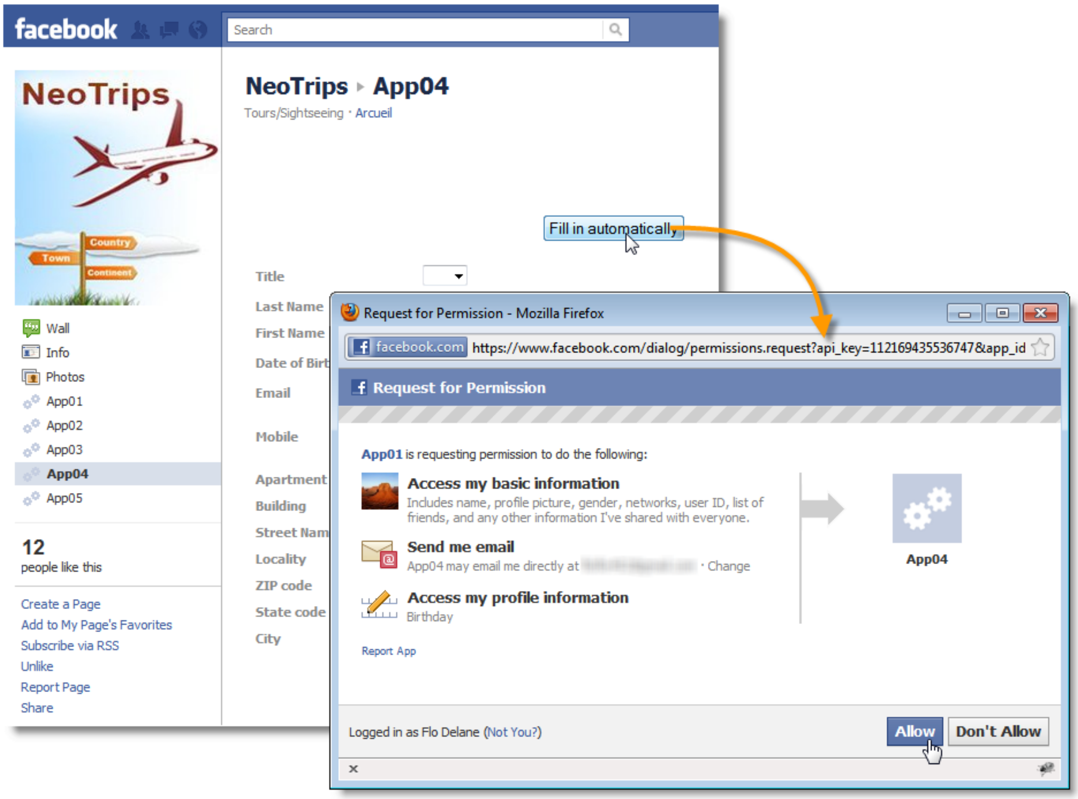
Warning:

This function is only available if you have installed the **Social Marketing** application. To use this option, you need to create a Facebook application along with a **Facebook Connect** type external account. For more on this, refer to the Social Marketing guide.

The **Preload with Facebook** option lets you insert a button into a form to preload fields using Facebook profile information.



When a user clicks the **Fill in automatically** button, the Facebook request for permission window opens.

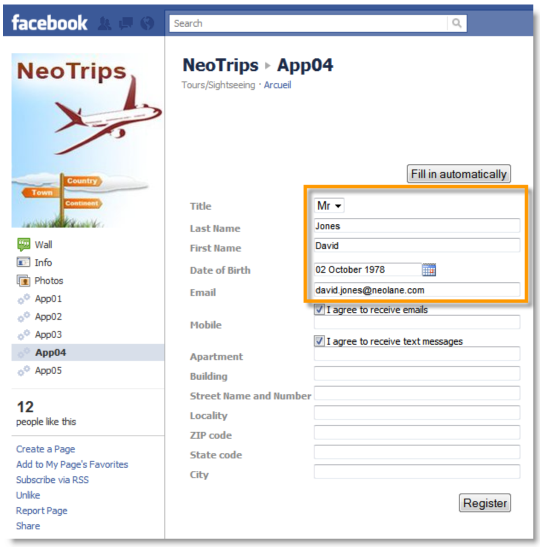


Note:

It's possible to change the list of extended rights when configuring the external account. If you don't enter any extended rights, Facebook forwards the basic profile information by default.

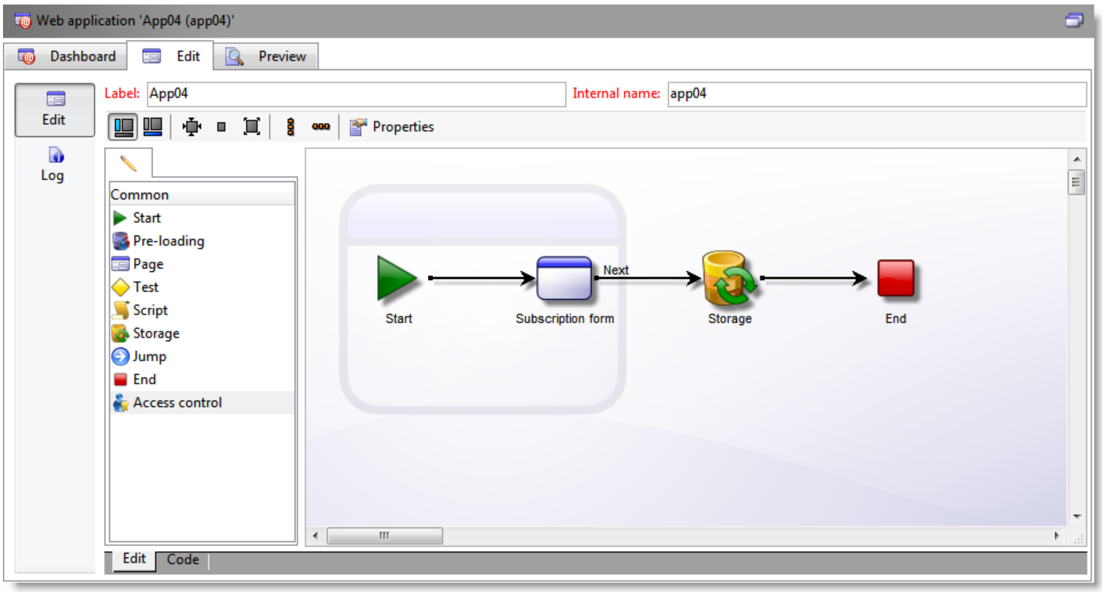
To view the list of extended rights and their syntax, click here: http://developers.facebook.com/docs/reference/api/permissions/

If the user agrees to share their information, the fields of the form are preloaded.



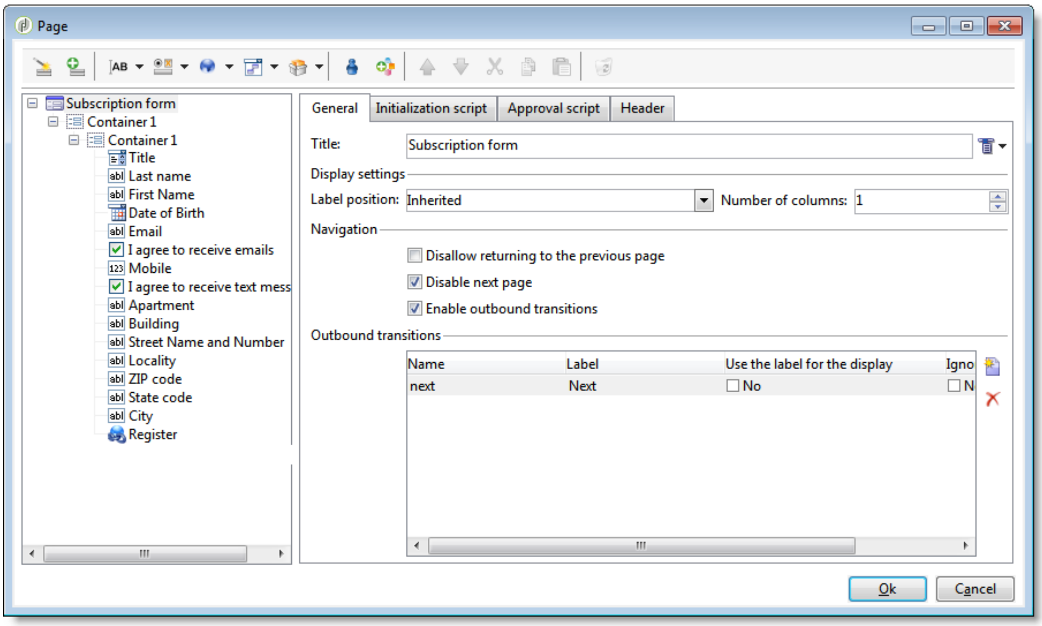
For this use case, we have created a web application made up of the following elements:

- a page containing the form
- a **Record** activity
- an **End** activity

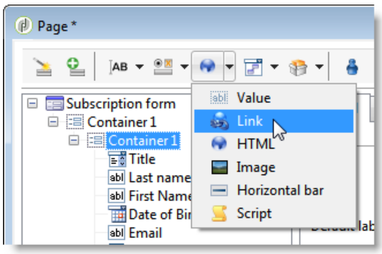


To add a preload button, apply the following steps:

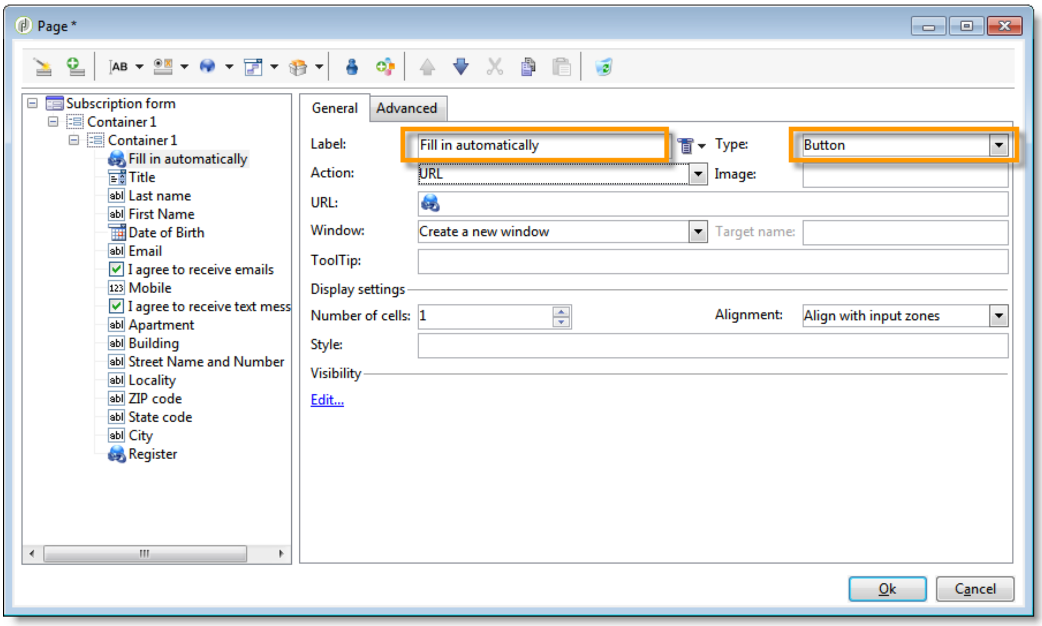
1 Create a form.



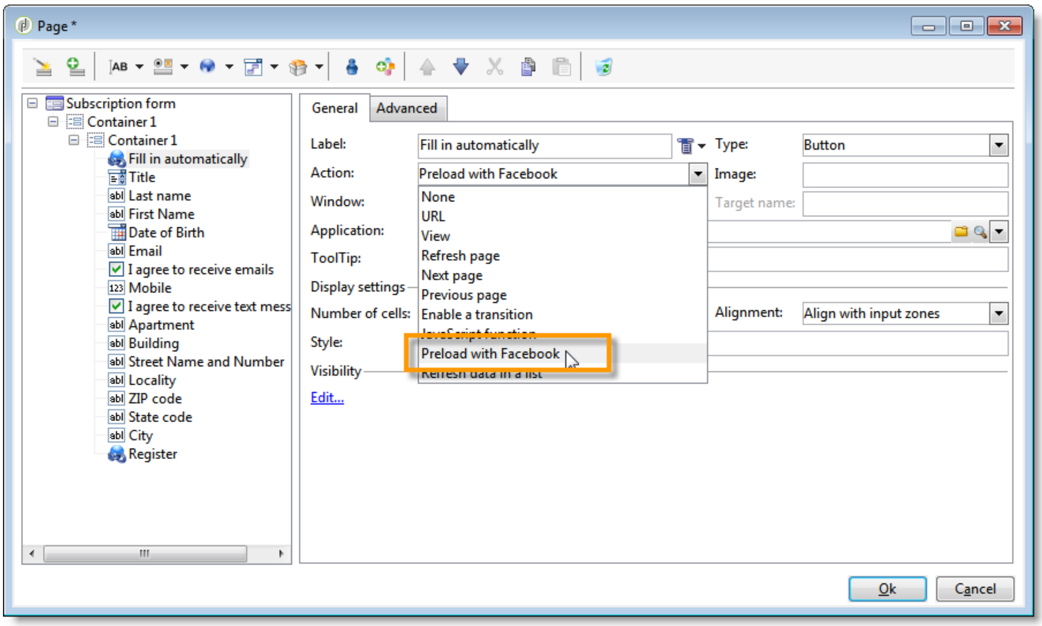
2 Go to the same level as the fields in the form and add a link.



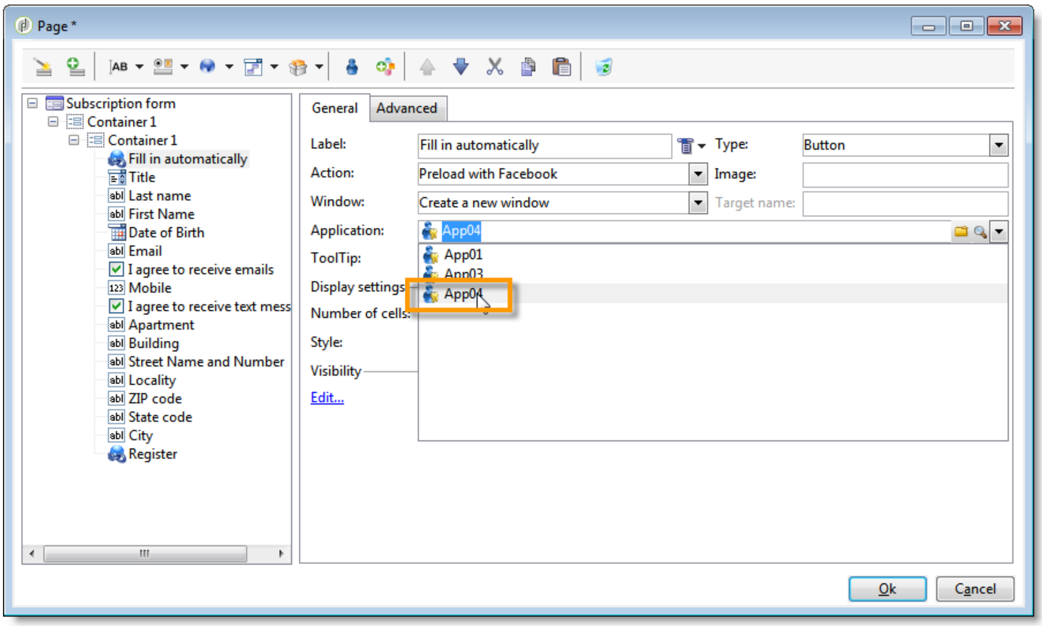
3 Enter the label and select the **Button** type.



4 Go to the **Action** field and select **Preload with Facebook**.

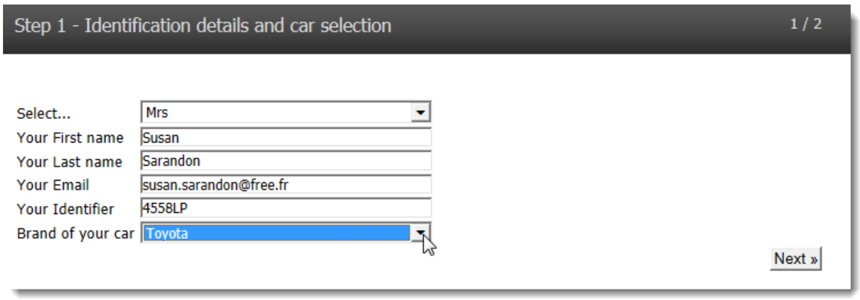


5 Go to the **Application** field and select the **Facebook Connect** type external account created previously. For more on this, refer to Social Marketing.



Personalizing HTML content

You can personalize the HTML content of a form page with data recorded in a previous page. For example, you can create a car insurance Web form whose first page lets you provide contact information and the brand of the car.

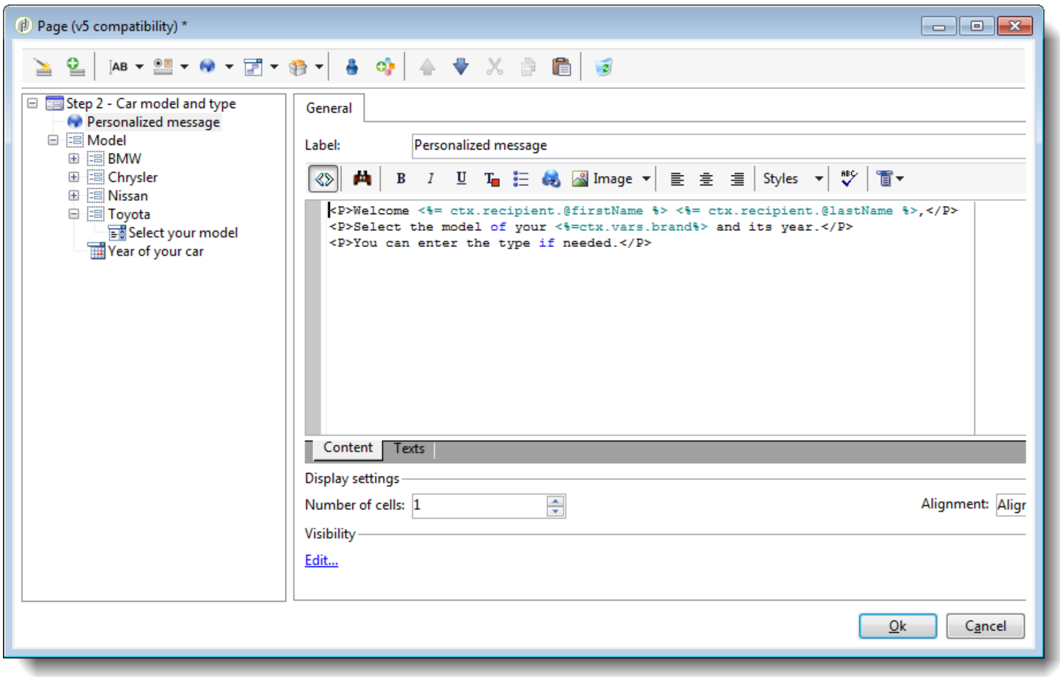


Use personalization fields to re-inject the user name and selected brand into the next page. The syntax to use depends on the information storage mode. For more on this, refer to Use collected information [page 111].

Note:

For security reasons, the value entered in the `<%=` formula is replaced with escape characters. To avoid this, and only when necessary, use the following syntax: `<%==` .

In our example, the first and last name of the recipient are stored in a field of the database, while the brand of their car is stored in a variable. The syntax of the message personalized on page 2 will be as follows:

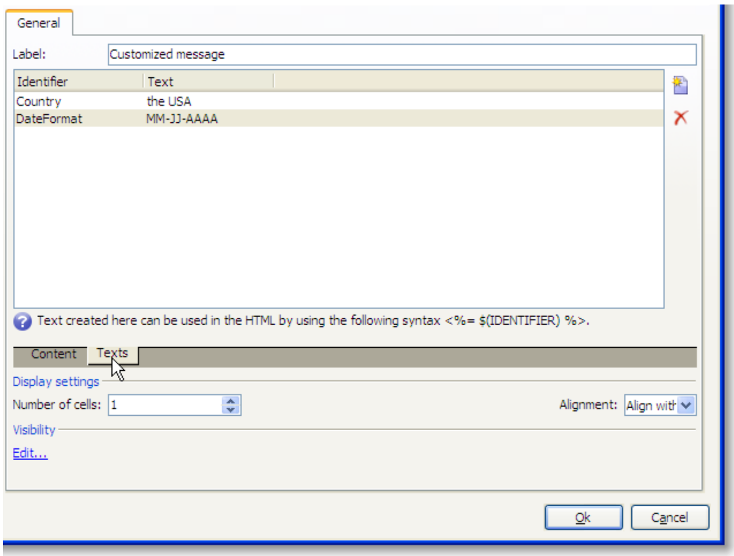



```
<P>Welcome <%= ctx.recipient.@firstName %> <%= ctx.recipient.@lastName %>,</P>
<P>To start your customized study, please select your car <%=ctx.vars.marque%> and its
year of purchase.</P>
```

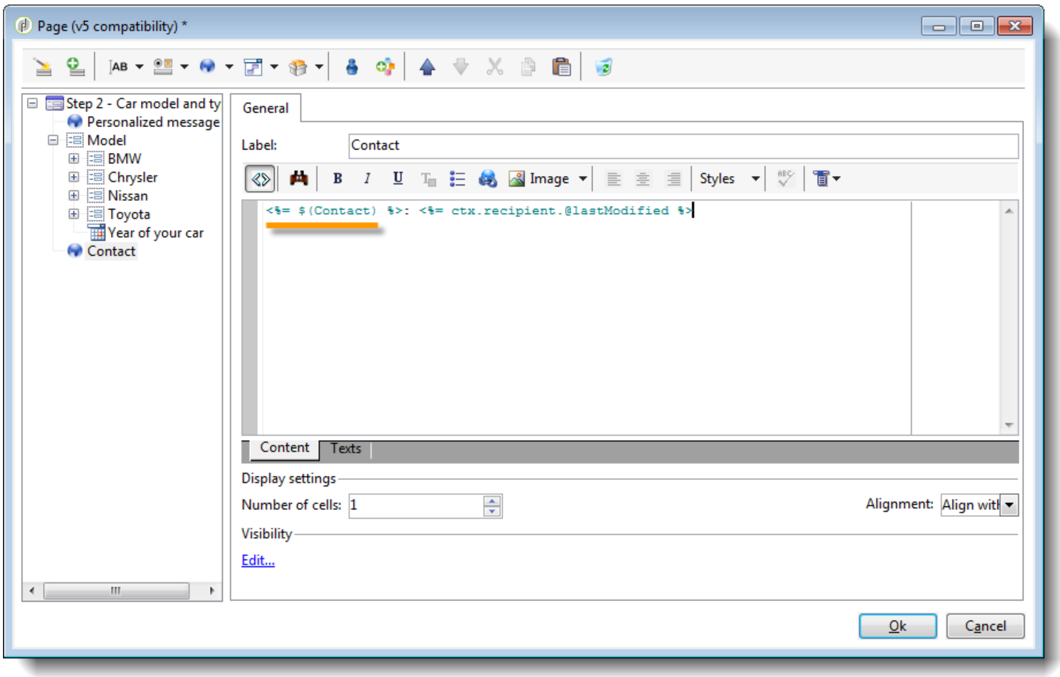
This produces the following result:

The **Text** tab lets you create variable fields which can be used in the HTML between the <%= and % characters with the following syntax: **$(Field)**.

For example, you can create a **Contact** field that will enable you to display the "Last contacted on" string to the HTML content. To do this, click the **Add** icon and enter the appropriate field and content.



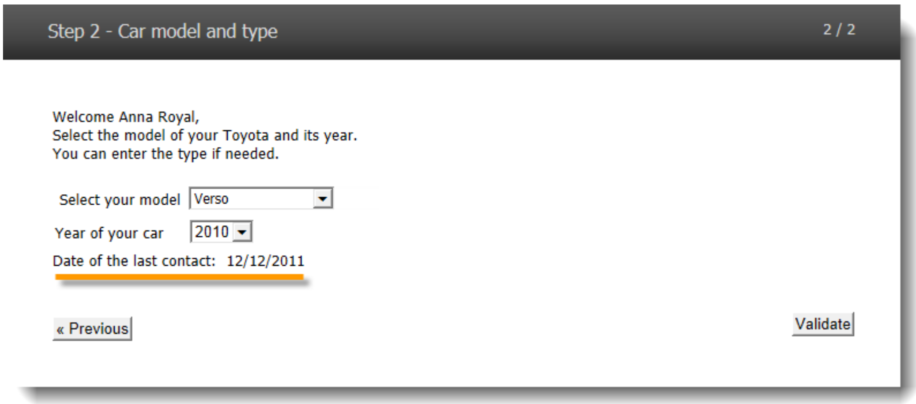
In the HTML content, insert this field via the <%= **$(Contact)** %> syntax.



Warning:

If you enter these characters in the HTML editor, the < and > fields will be replaced with their escape characters. In this case, you need to correct the source code by clicking the **Display source code** icon of the HTML text editor.

Open the **Preview** label of the form to view the value entered in the HTML:



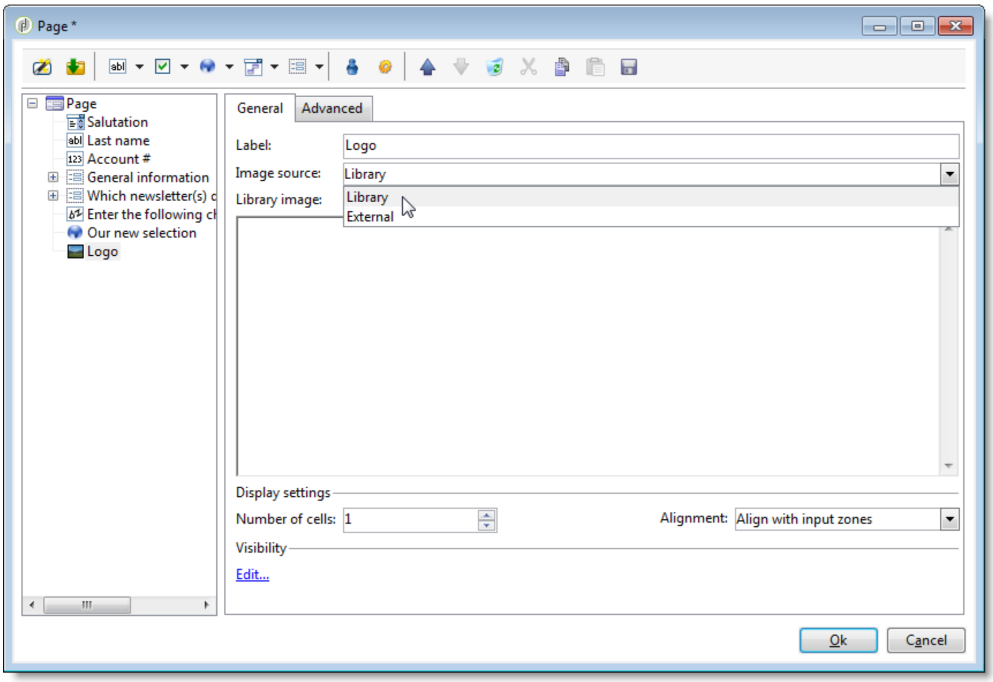
This operating mode lets you factorize the text of Web forms and manage translations using the integrated translation tool. For more on this, refer to Translating a form [page 132].

Images

For images to be included in forms, they must be saved on a server that is accessible from outside.

Select the **Static elements>Image** menu.

Select the source of the image to be inserted: it can come from the public resource library or be stored on an external server accessible from outside.



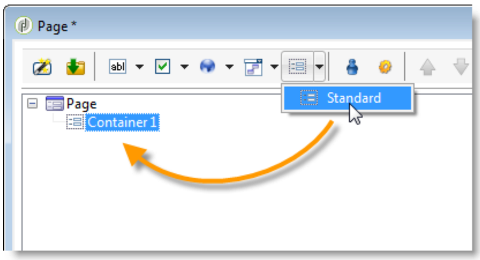
If this is an image from the library, select it in the combo-box of the field; if it is located in an external file, enter the access path. The label will be displayed by passing the cursor over the image (coincides with an ALT field in HTML), or when the image isn't displayed.

The image can be viewed in the central section of the editor.

Adding containers

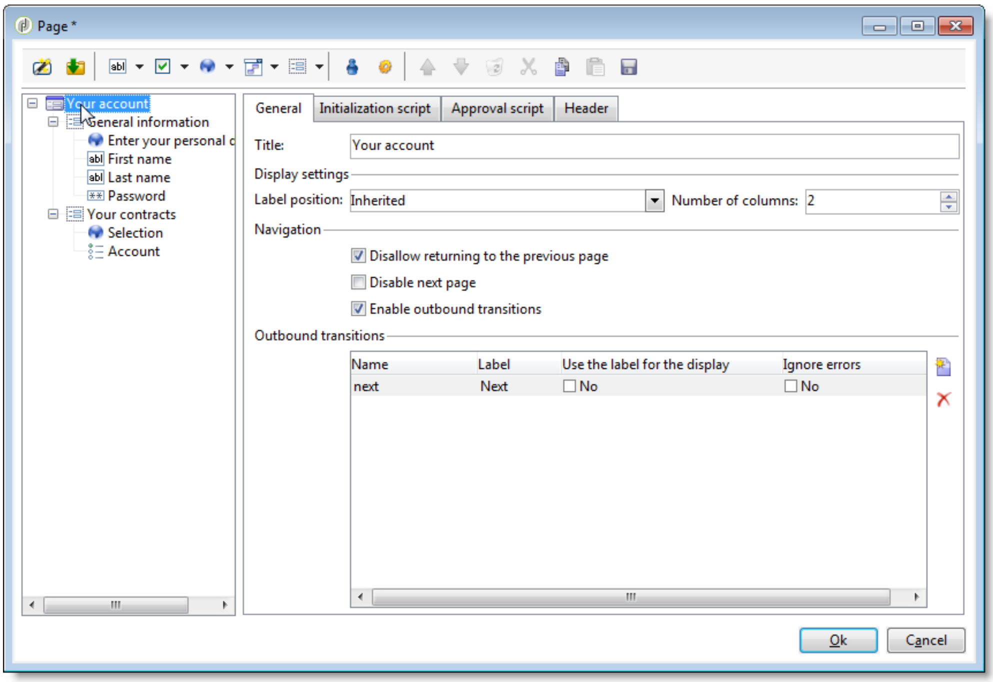
Containers let you combine the fields of a page and configure their layout; to organize the elements in the page.

For each page of the form, containers are created via the **Containers** button of the toolbar.



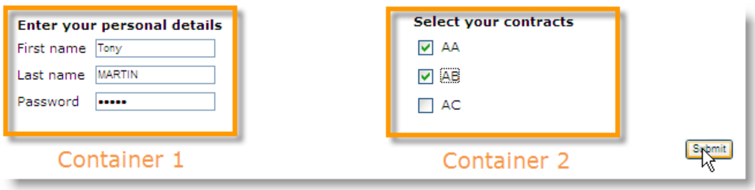
Use a container to group elements of the page without adding a label to the final rendering. Elements are grouped into the container sub-tree. Standard containers let you manage the layout of checks.

For example:



The position of labels is applied to elements placed below the container in the hierarchy. It can be overloaded for each element if necessary. Add or remove columns to change the layout. See Configuring element layout [page 84].

In the above example, the rendering will be as follows:



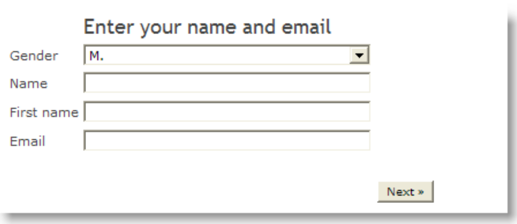
Configuring element layout

Positioning the fields on the page

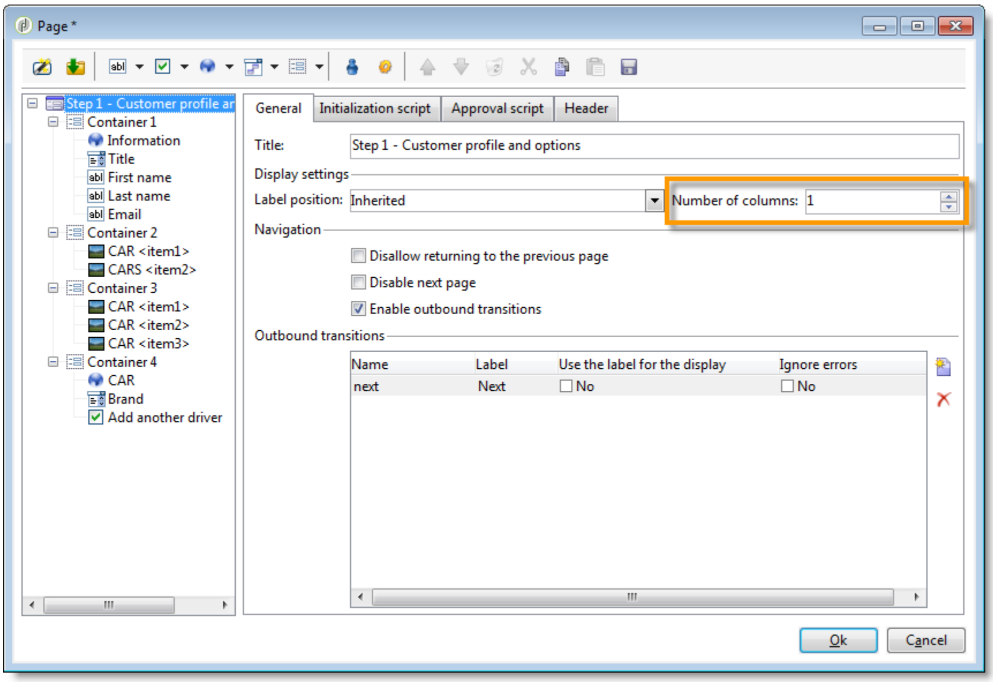
The layout of the Web form is defined page by page in each container and can be overloaded for each check.

Pages are broken down into columns: each page contains a certain number of columns. Each field of the page occupies n cells. Containers also occupy a certain number of columns and the fields they contain occupy a certain number of cells

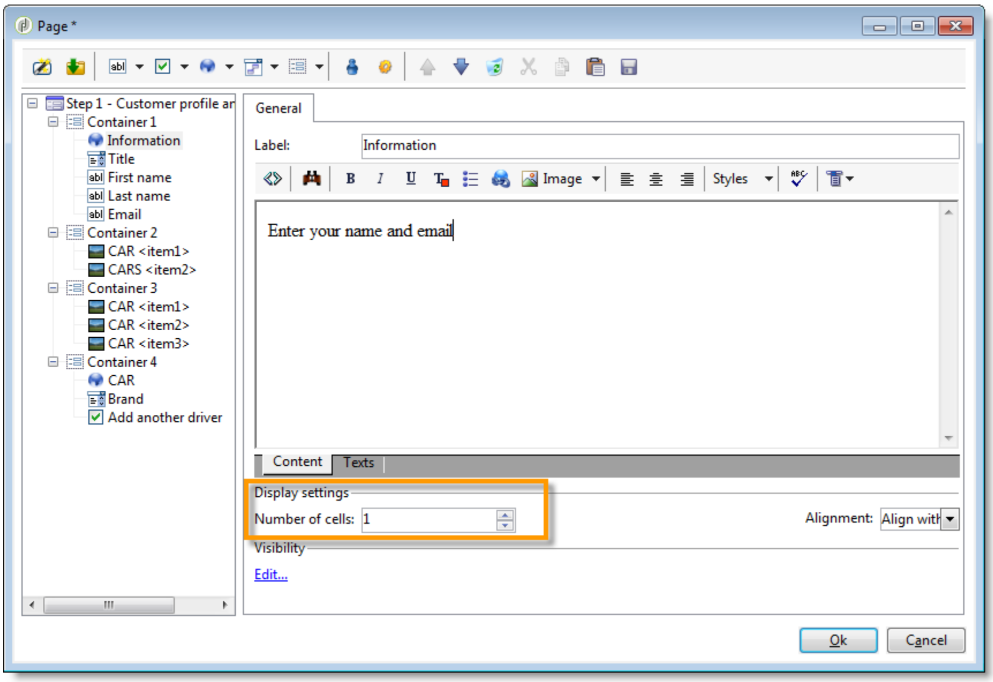
By default, pages are built on a single column and each element occupies one cell. This means that fields are displayed one under another, each one occupying a whole line, as shown below:



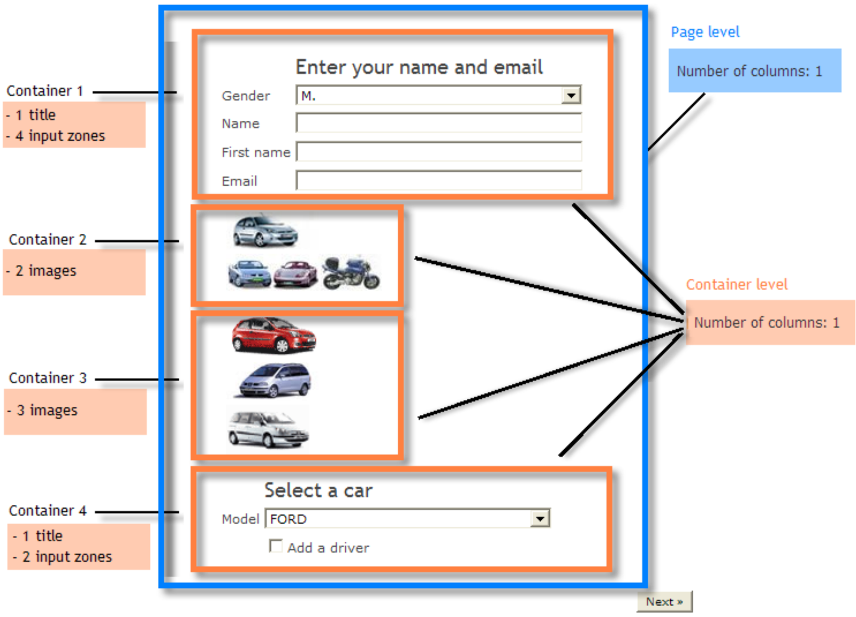
In the following example, the default configuration has been kept. The page occupies a single column which includes four containers.



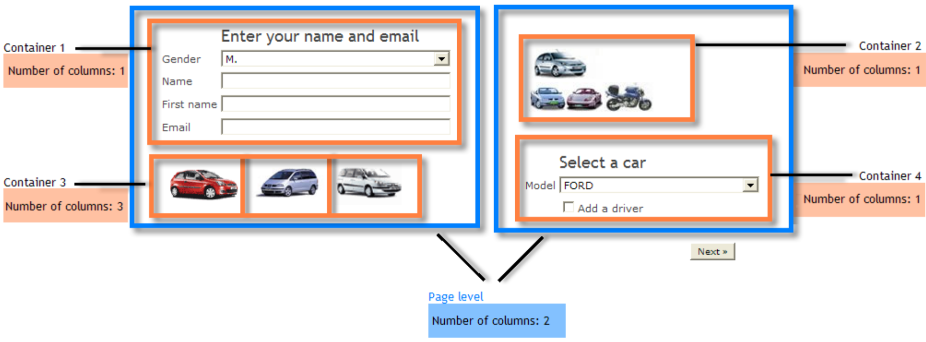
Each container occupies one column and each element occupies one cell:



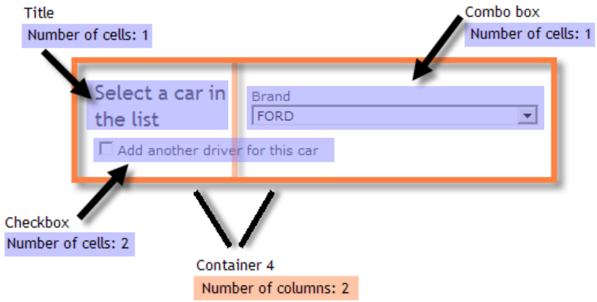
The rendering is as follows:



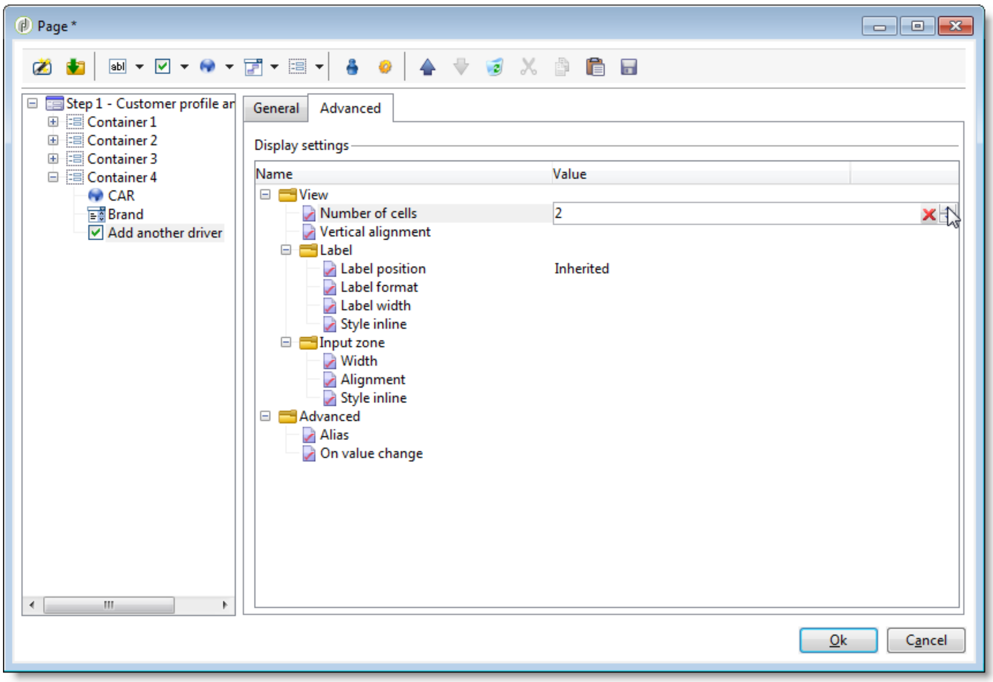
You can adapt the display parameters to obtain the following rendering:



In the above rendering example, each input field, title and image occupies one cell in the columns of the containers. You can modify the formatting in each container. In our example, you can spread the content of container 4 over two columns and distribute the elements.



The title and the list occupy one cell each (and therefore an entire line of the container) and the checkbox extends over two cells. The number of cells attributed to the input field is defined in the **General** tab or the **Advanced** tab, according to the type of field:

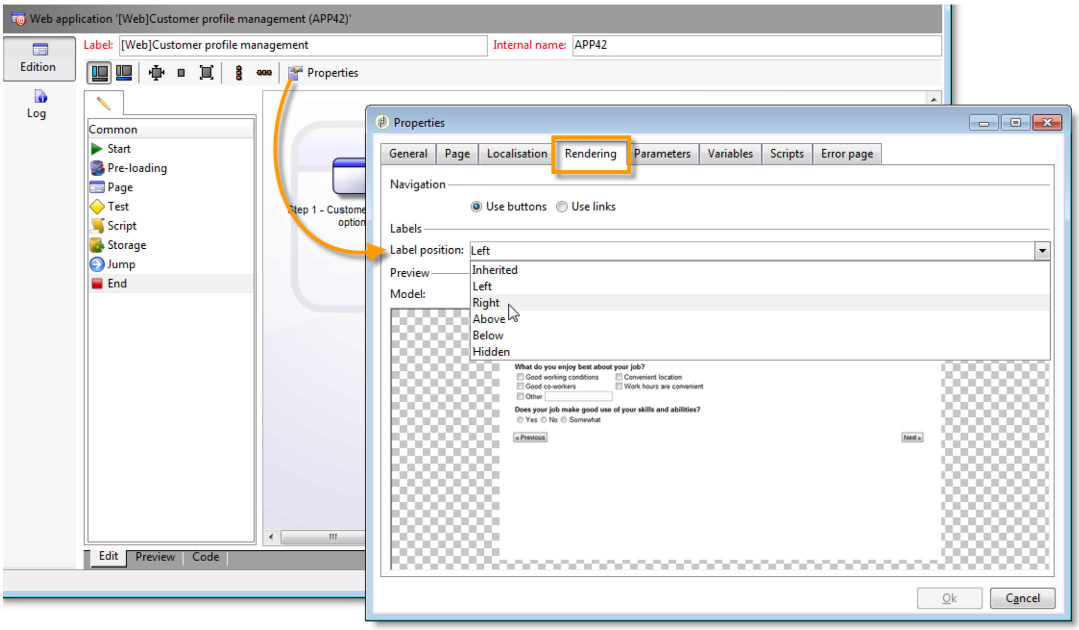


Defining the position of labels

You can define the alignment of fields and labels in the form.

By default, the display parameters for fields and other content of the page are inherited from the general configuration of the form, the configuration of the page, or the configuration of the parent container, if it exists.

The global display parameters for the entire form are specified in the form properties box. The **Rendering** tab lets you select the position of labels.



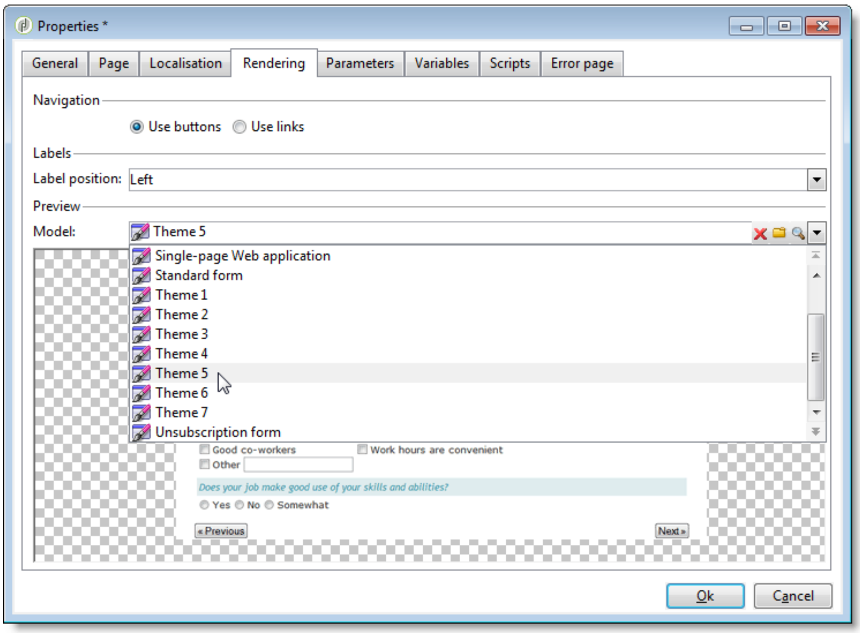
This position can be overloaded for each page, each container, and each field, via the **Advanced** tab.

The following alignments are supported:

- Inherited: the alignment is inherited from the parent element (default value), i.e. the parent container if any, or else the page.
- Left/Right: the label is positioned to the right or to the left of the field,
- Above/Below: the label is positioned above or below the field,
- Hidden: the label is not displayed.

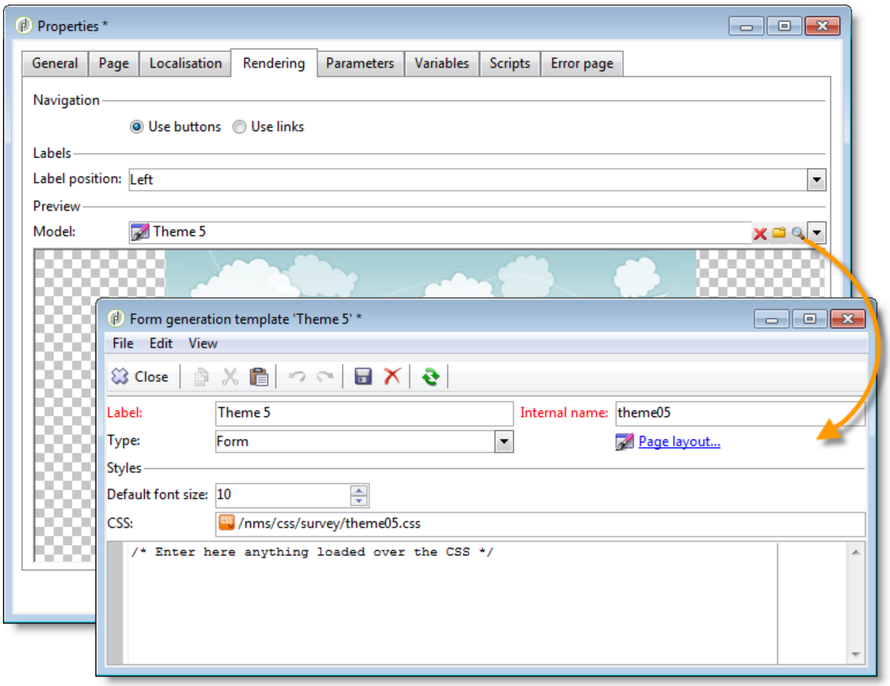
Selecting the form rendering template

The form settings enable you to select the template used to generate the pages. To access them, click the **Settings** button in the form detail toolbar, and select the **Rendering** tab. There are a number of templates (style sheets) available by default.

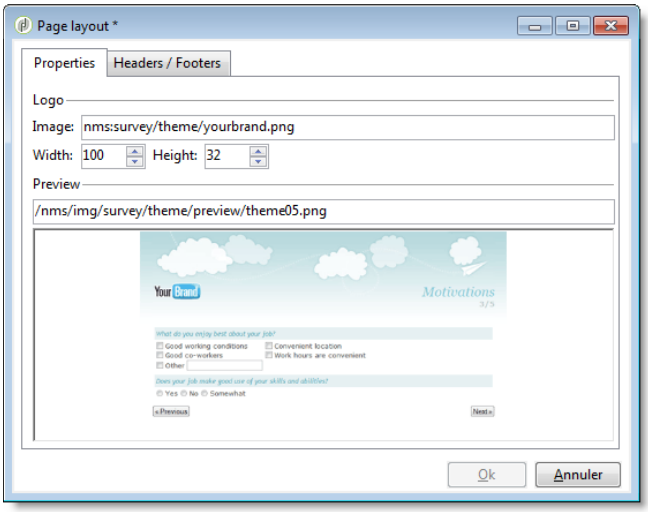


The bottom section of the editor enables you to view a rendering of the selected template.

The zoom feature lets you edit the selected template.



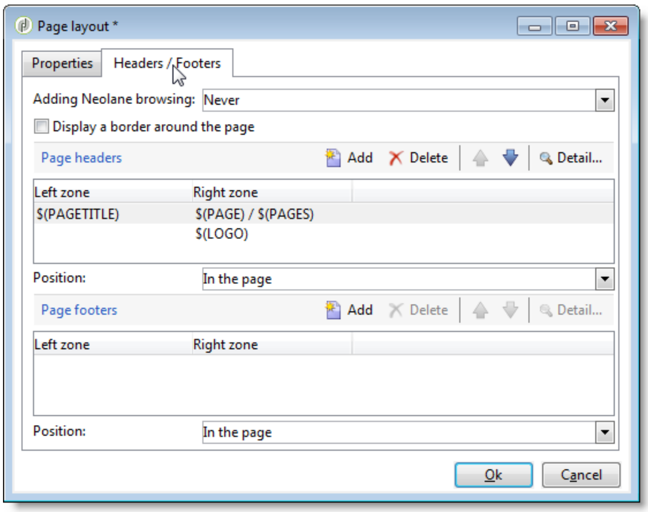
You can modify or override these templates. To do this, click the **Page layout...** link and personalize the information.



You can:

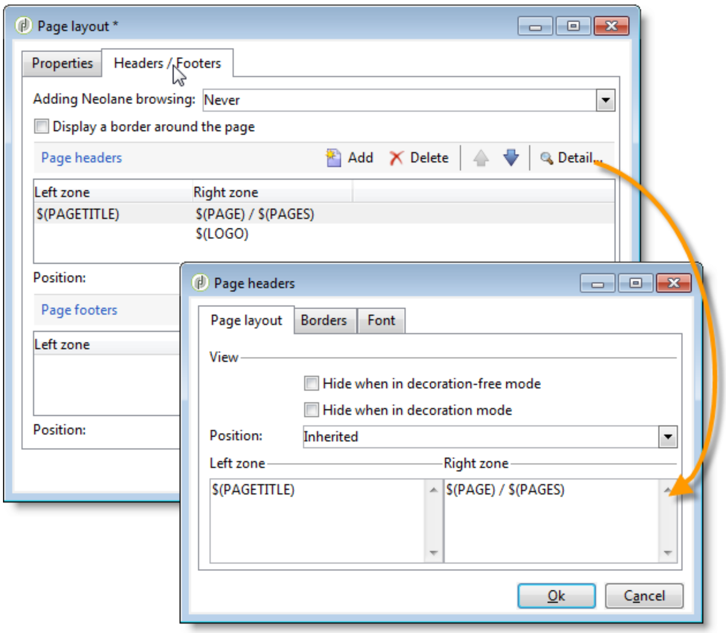
- Change the image used as a logo and adapt its size,
- Also specify the path for accessing the preview image when users select this rendering template.

The **Headers/Footers** tab lets you change the information displayed in the headers and footers of each form page using this template.



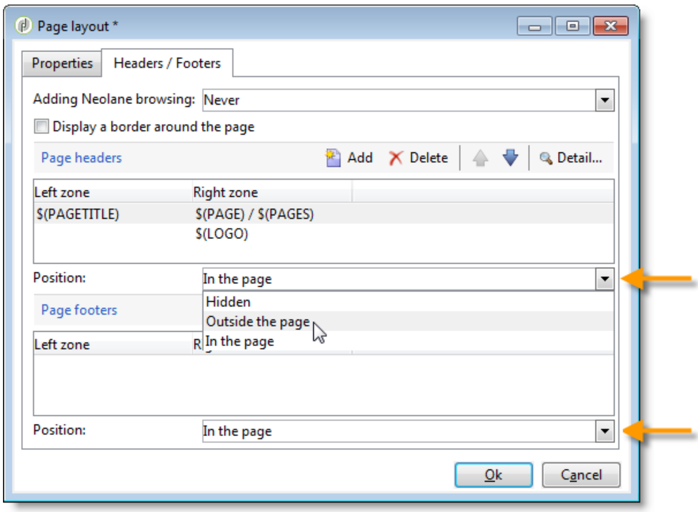
Each line of the **Page headers** and **Page footers** section corresponds to a line in the HTML page. Click **Add** to create a new line.

Select an existing line and click the **Detail** button to personalize it.



You can change the content of the line, add borders, and change the font attributes via the relevant tabs. Click **OK** to confirm these changes.

The **Position** fields let you define the position of elements in the page header and footer.



Note:

Rendering templates are stored in the **Administration>Configuration>Form rendering** node.

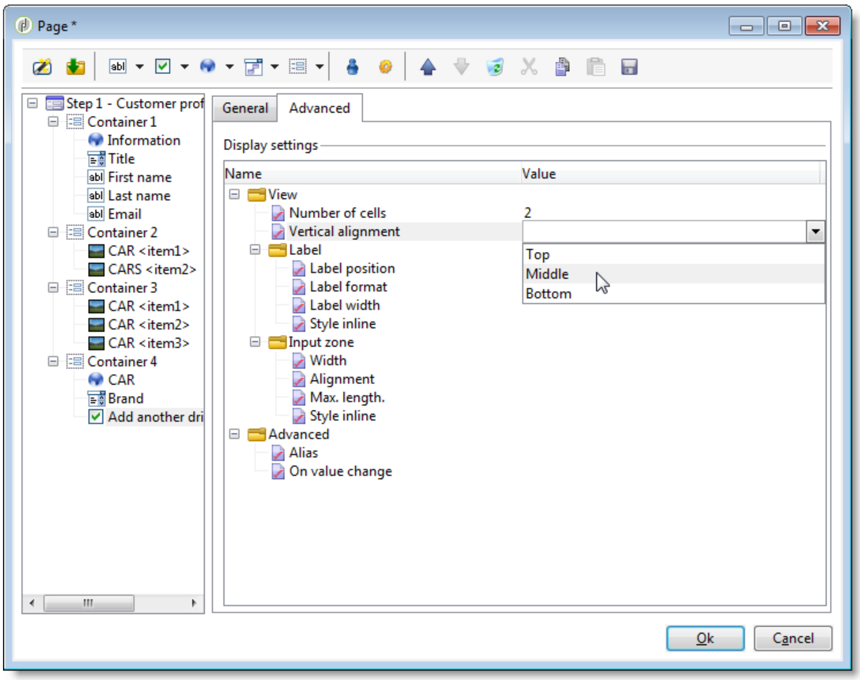
For more on this, refer to Personalizing form rendering [page 91]

Personalizing form rendering

Changing the layout of elements

You can overload the style sheet for each element of the form (input fields, images, radio buttons, etc.).

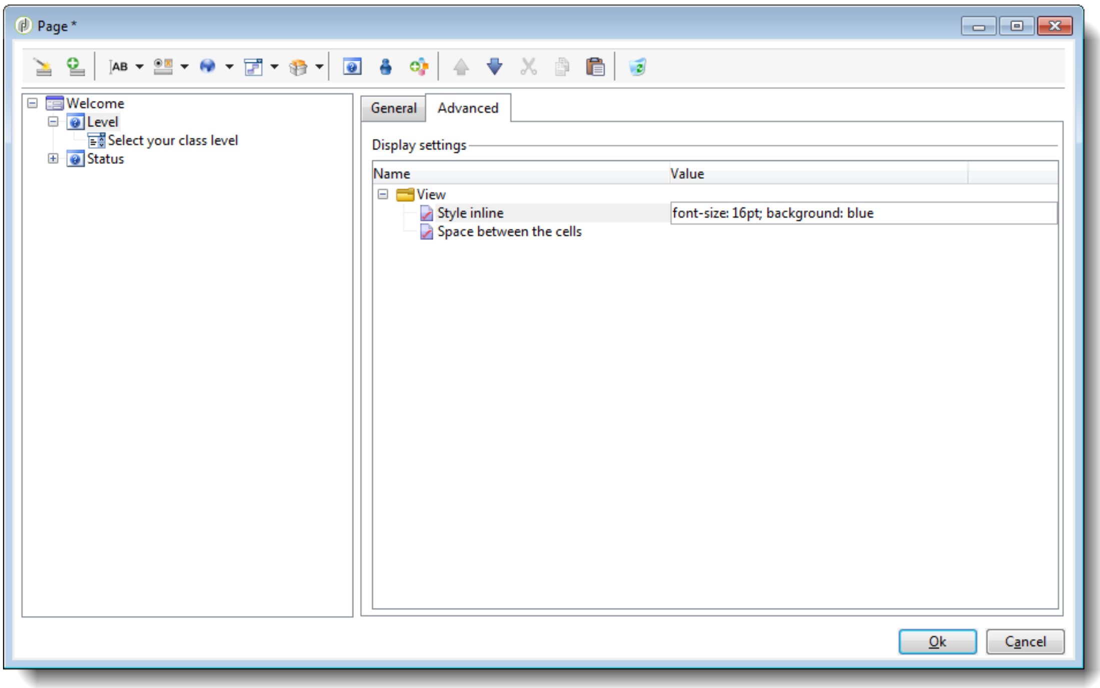
To do this, use the **Advanced** tab.



It enables you to define the following properties:

- **Label position**: see Defining the position of labels [page 87],

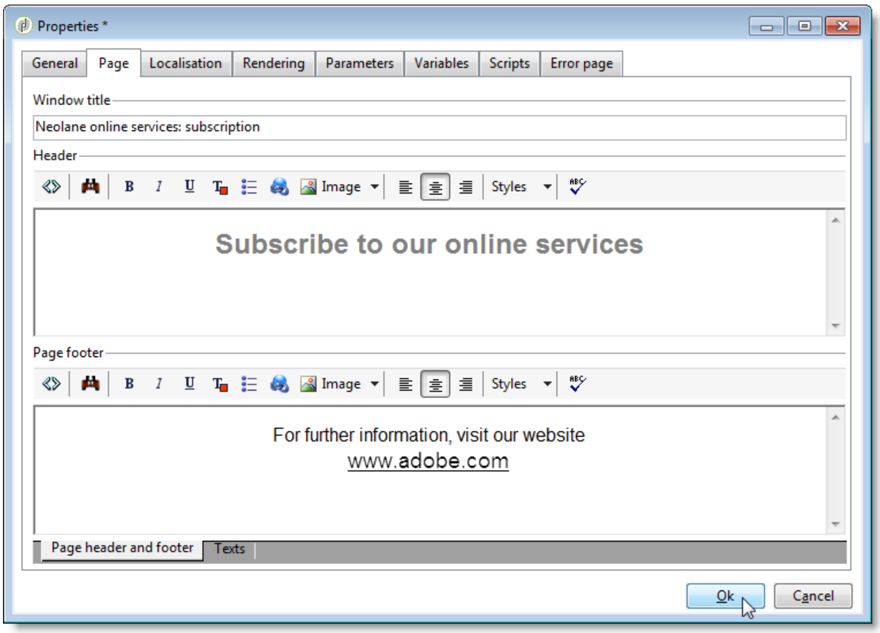
- **Label format**: Word wrap or No word wrap.
- **Number of cells**: see Positioning the fields on the page [page 84],
- **Horizontal alignment** (Left, Right, Centered) and **Vertical alignment** (High, Low, Middle),
- **Width** of the zone: this can be expressed as a percentage or in ems, points, or pixels (default value).
- Maximum **Length**: Maximum number of characters allowed (for Text, Number and Password type controls),
- **Lines**: number of lines for a **Multi-line text** type zone.
- **Style inline**: enables you to overload the CSS style sheet with additional settings. These are separated using **;** characters as shown in the example below:



Define headers and footers

Fields are sequenced in a tree structure whose root has the same name as the page. Select it to modify the name.

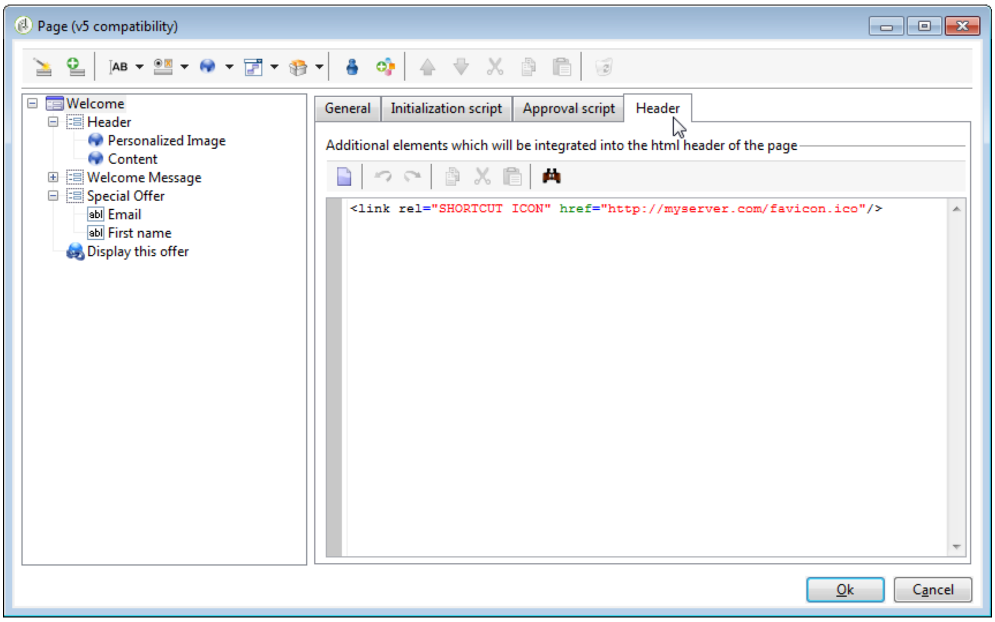
The title of the window must be entered in the **Page** tab of the form property window. You can also add a set content to the page header and footer (this information will be shown on every page). This content is entered in the matching sections of the **Texts** tab, as shown below:



Adding elements to HTML header

You can enter additional elements to be inserted into the HTML header of a form page. To do this, enter the elements in the **Header** tab of the relevant page.

This lets you reference an icon that will be displayed in the page's title bar, for example.

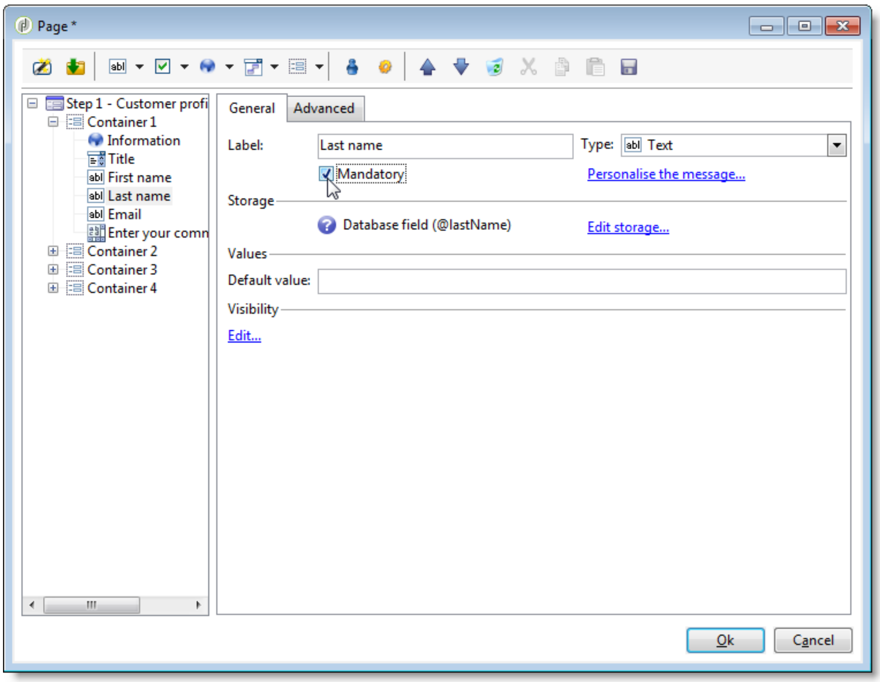


Defining check and approval settings

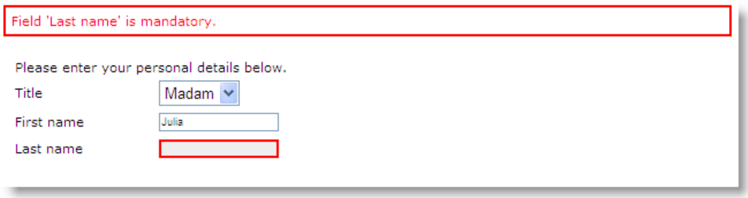
When the user fills in the form, a check is automatically carried out on certain fields depending on their format or configuration. This lets you make certain fields mandatory (refer to Defining mandatory fields [page 94]) or check the format of the data entered (refer to Checking data format [page 95]). Checks are carried out during page approval (by clicking a link or button which enables an output transition).

Defining mandatory fields

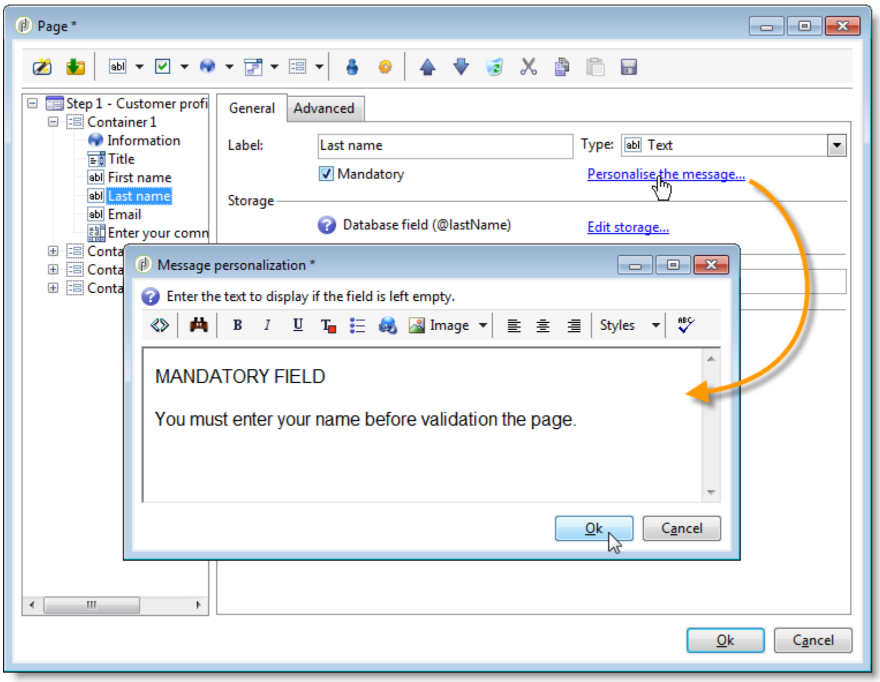
To make certain fields mandatory, select this option when creating the field.



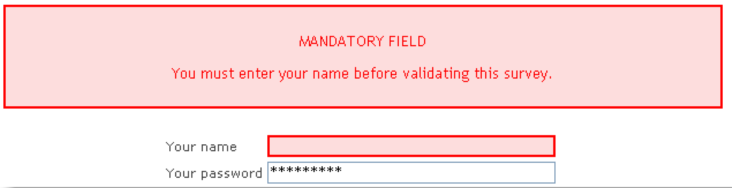
If the user approves this page without having entered the field, the following message will be displayed:



You can personalize this message by clicking the **Personalize this message** link.



If the user approves this page without having entered the field, the following message will be displayed:

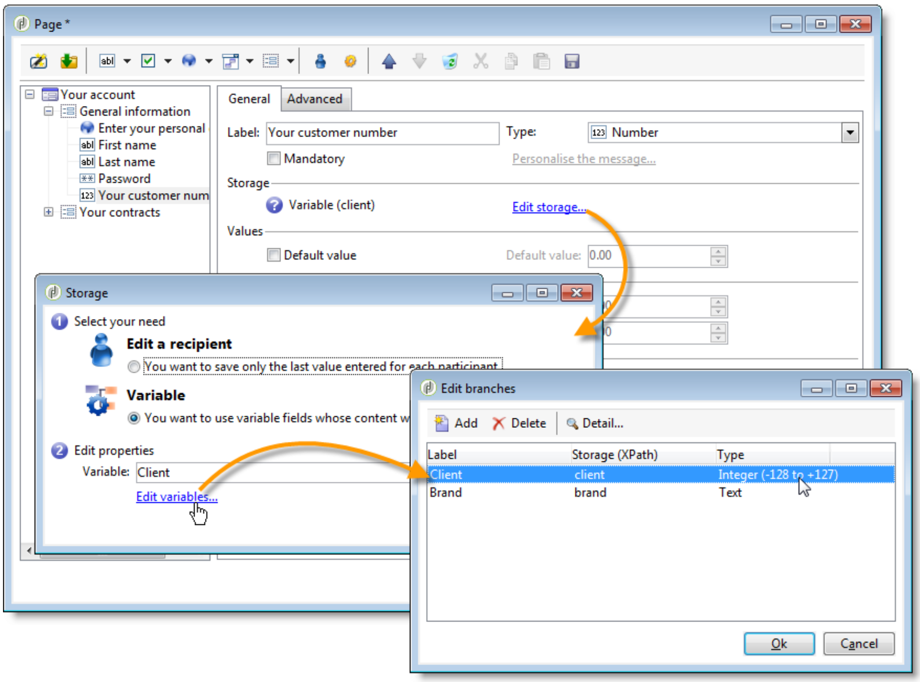


Checking data format

For form checks whose values are stored in an existing field of the database, the rules for the storage field will be applied.

For form checks whose values are stored in a variable, approval rules depend on the format of the variable.

For example, if you create a **Number** check to store the client number, as shown below:

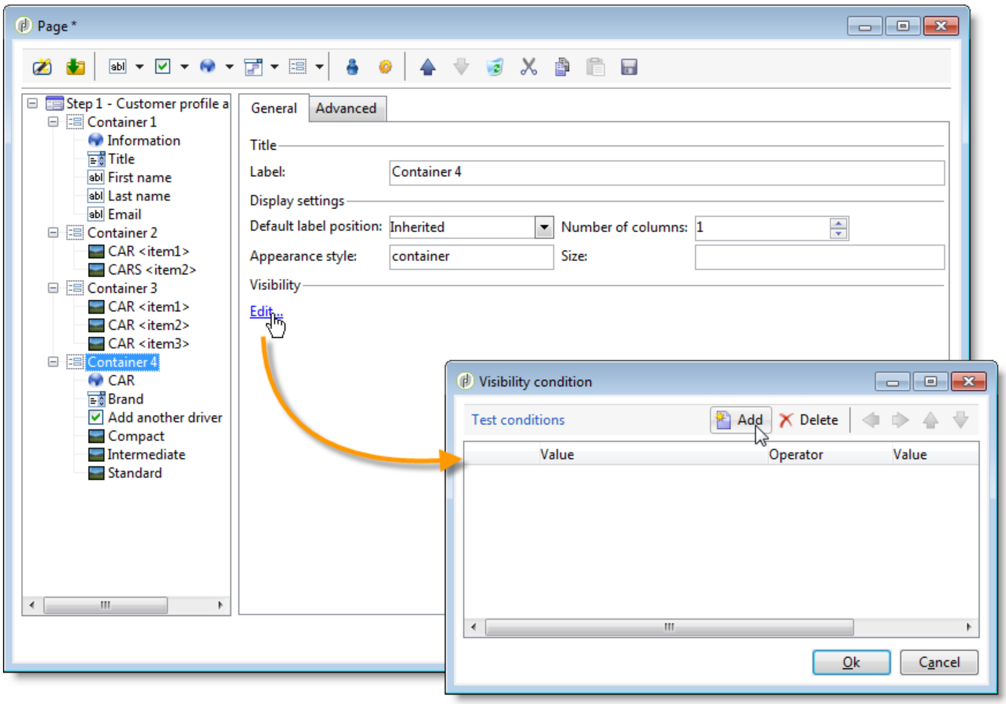


The user must enter an integer in the form field.

Defining conditional display

You can configure the display of fields on the page to be displayed based on the values chosen by the user. This can apply to one field or a group of fields (when they are grouped in a container).

For each element of the page, the **Visibility** section lets you define the display conditions.

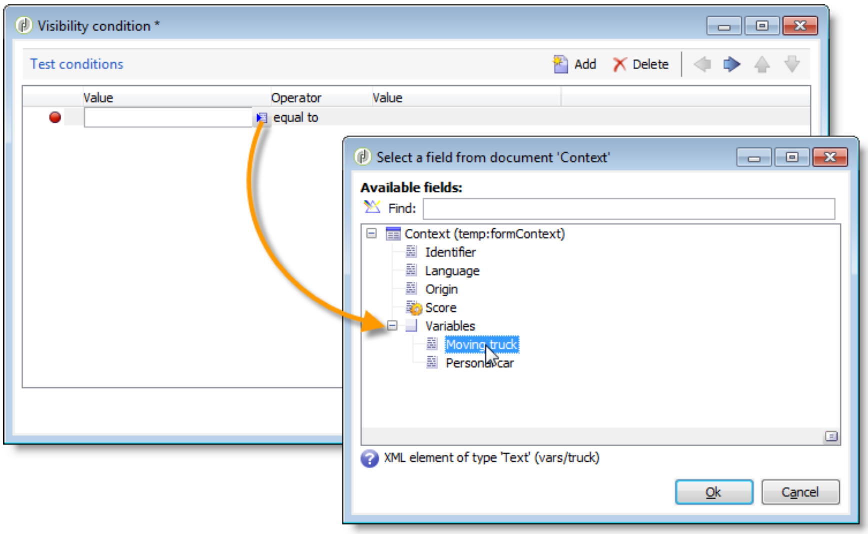


Note:

Field selection

Conditions can concern the value of database fields or variables.

In the field selection window, you can choose from the following data:



- The main tree contains the parameters of the form context. The default parameters are the Identifier (which matches the encrypted identifier of the recipient), Language and Origin.

  For more on this, refer to URL parameters [page 129].
- The **Recipients** sub-tree contains the input fields inserted into the form and stored in the database.

  For more on this, refer to Store in a field of the database [page 107].
- The **Variables** sub-tree contains the available variables for this form. For more on this, refer to Store in a local variable [page 107].

For more on this, refer to the use case available here: Display different options depending on the selected values [page 156].

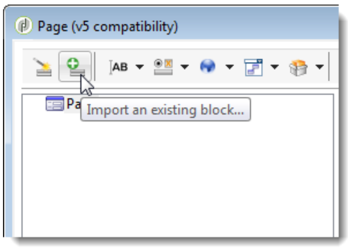
You can also condition the display of form pages using the **Test** object. For more on this, refer to Conditional page display [page 103].

Importing elements

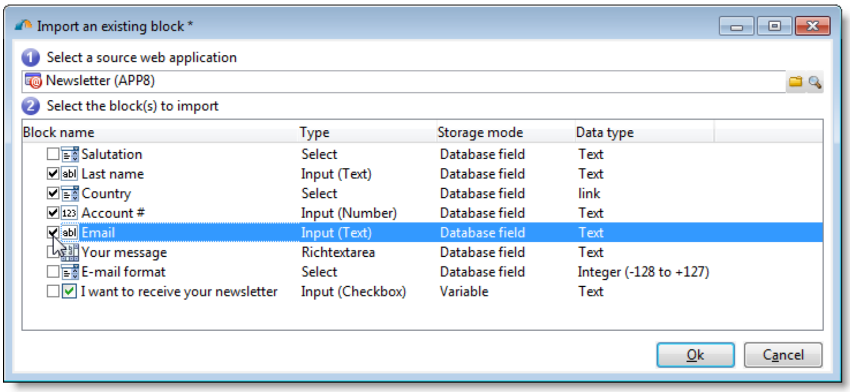
It's possible to import fields or containers from other Web forms. This lets you create a library of re-usable blocks which will be inserted into forms, such as the address block, the newsletter subscription area, etc.

To import an element into a form, apply the following steps:

1. Edit the page which you want to insert one or more elements into, then click **Import an existing block** in the toolbar.



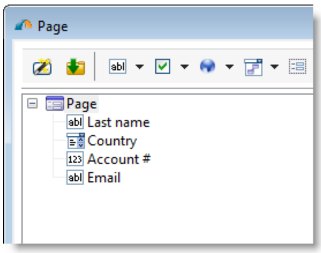
2 Select the Web form which contains the fields to import and choose the containers and fields to import.



Note:

The **Edit link** icon to the right of the source form name lets you view the selected Web form.

3 Click **Ok** to confirm insertion.



Defining page sequencing

Creating the diagram

The form can contain one or more pages. It is built via a diagram which lets you sequence pages and testing, script execution and page jump recording stages. The diagram construction mode is the same as for a workflow.

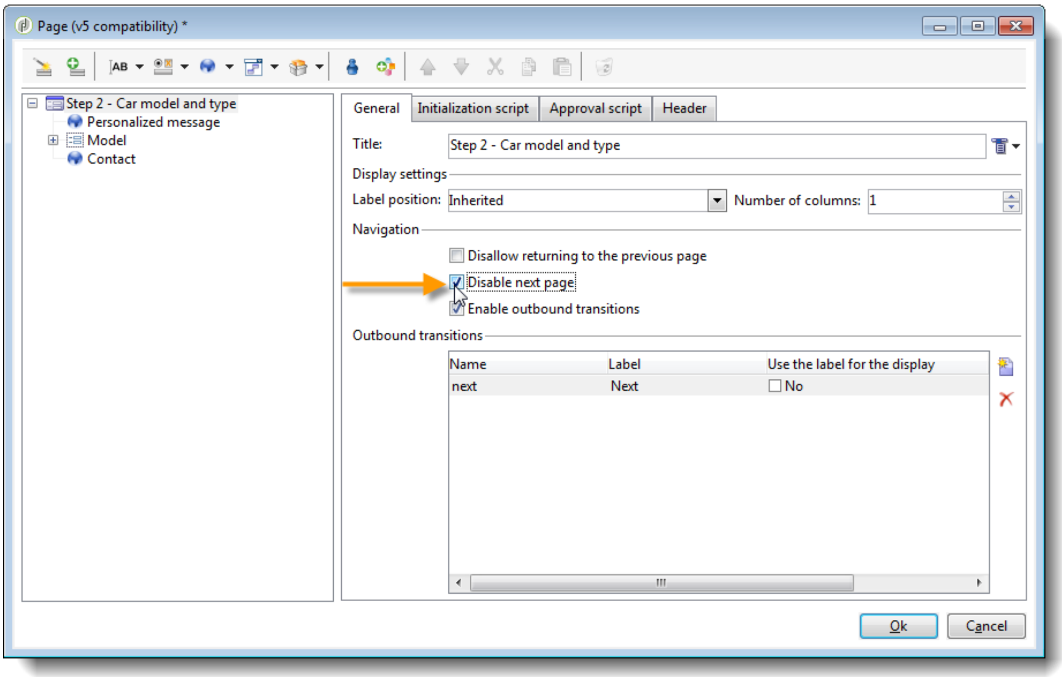
Browsing web forms

Defining conditions for the page to be displayed

See Conditional page display [page 103].

Disable returning to the previous page / going to the next page

For each page, you can delete the **Next** or **Previous** buttons. To do this, select the page concerned and select the option **Disable next page** or **Disallow returning to the previous page**.



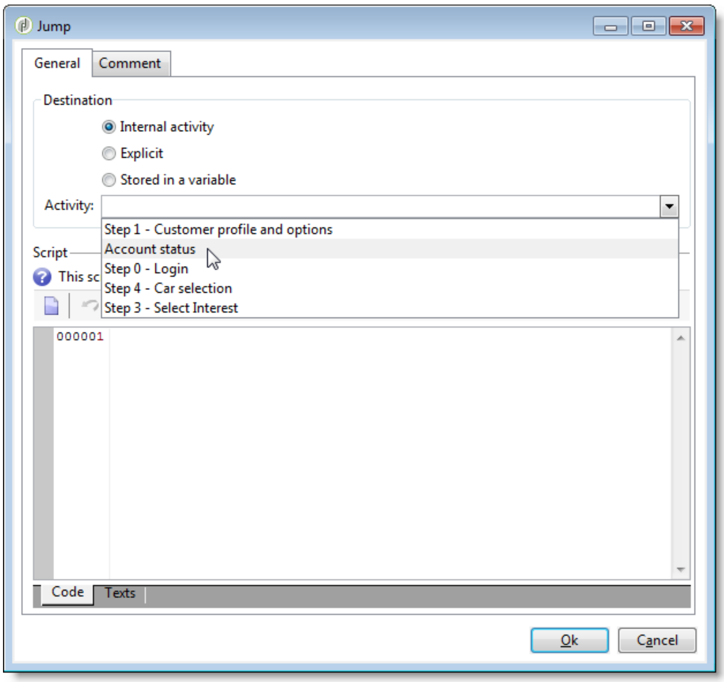
You can replace these buttons with links. See HTML content [page 71].

Inserting a jump

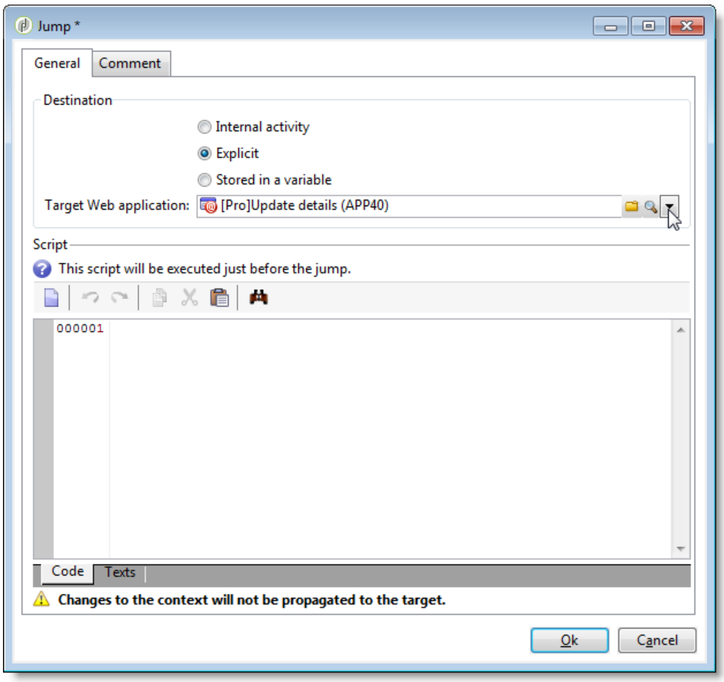
The **Jump** object gives access to another page or another form when the user clicks **Next**.

The destination can be:

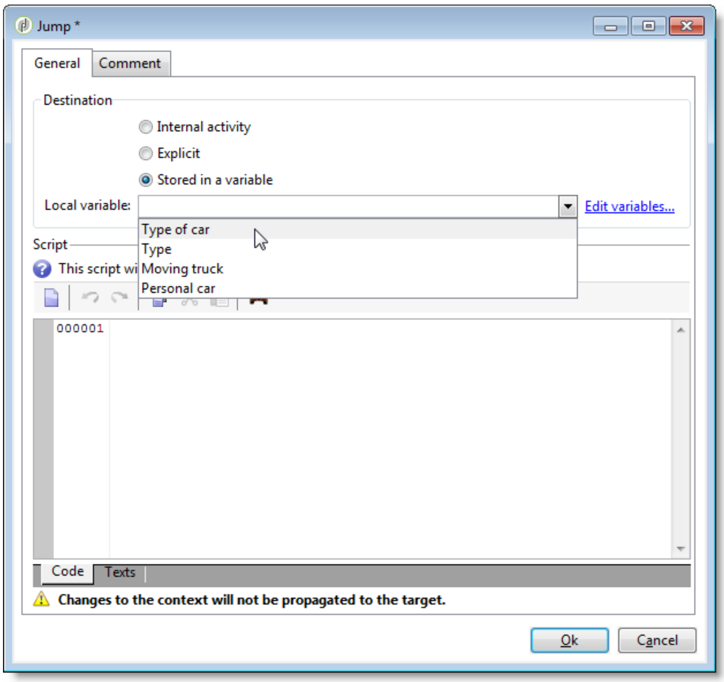
- Another page of the form. To do this, select **Internal activity** and then specify the desired page, as below:



- Another form. To do this, select the **Explicit** option and specify the destination form.

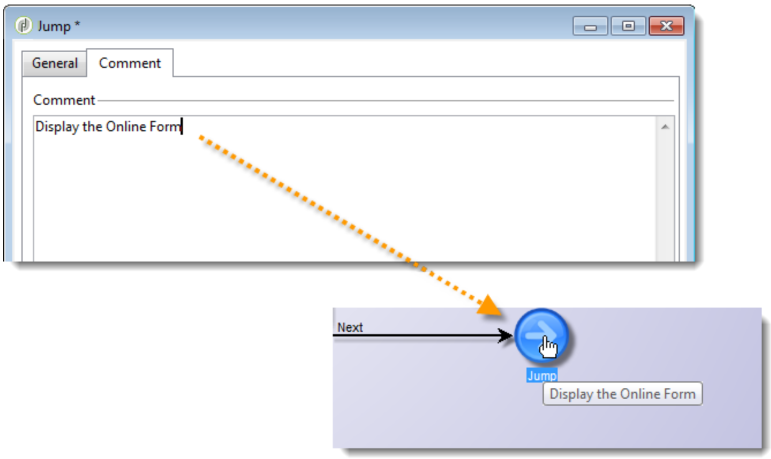


- The destination can be stored in a variable. In this case, select it from the drop-down list, as shown below:



Note:

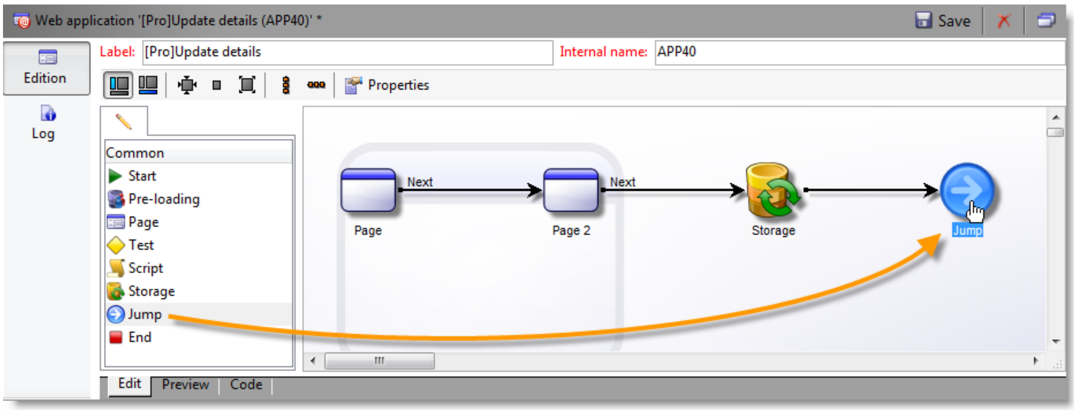
The **Comment** tab lets you enter information that will be visible by the operator when they click the object in the diagram.



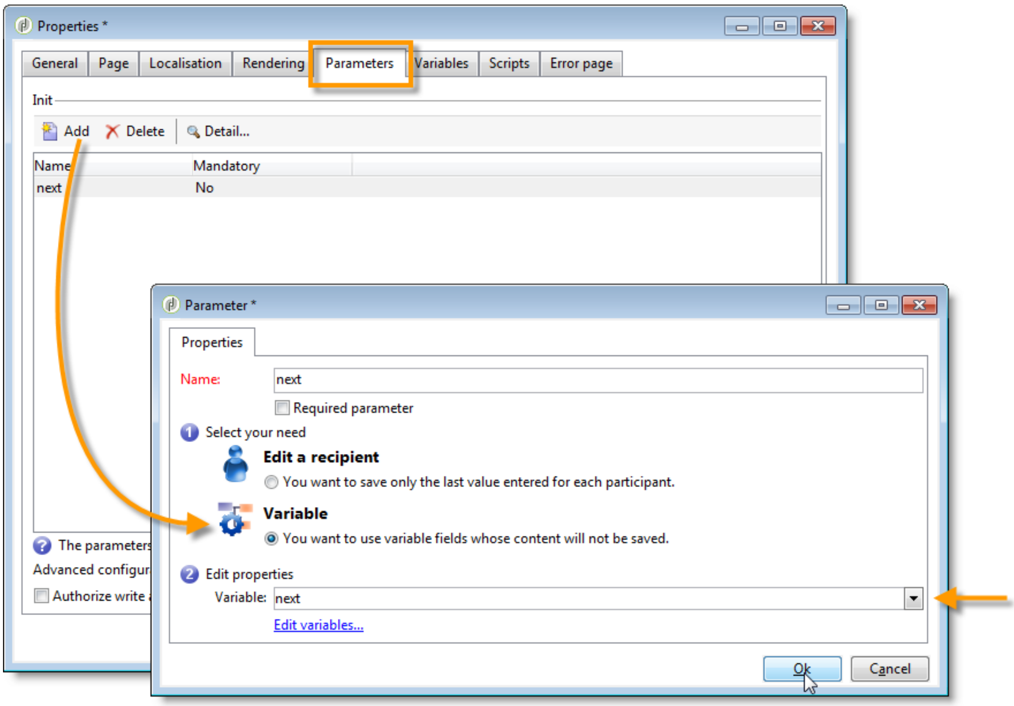
Example: display another form according to a parameter of the URL

In the following example, we want to configure a Web form which, when approved, will display another form designated by a parameter of the URL. To do this, apply the following steps:

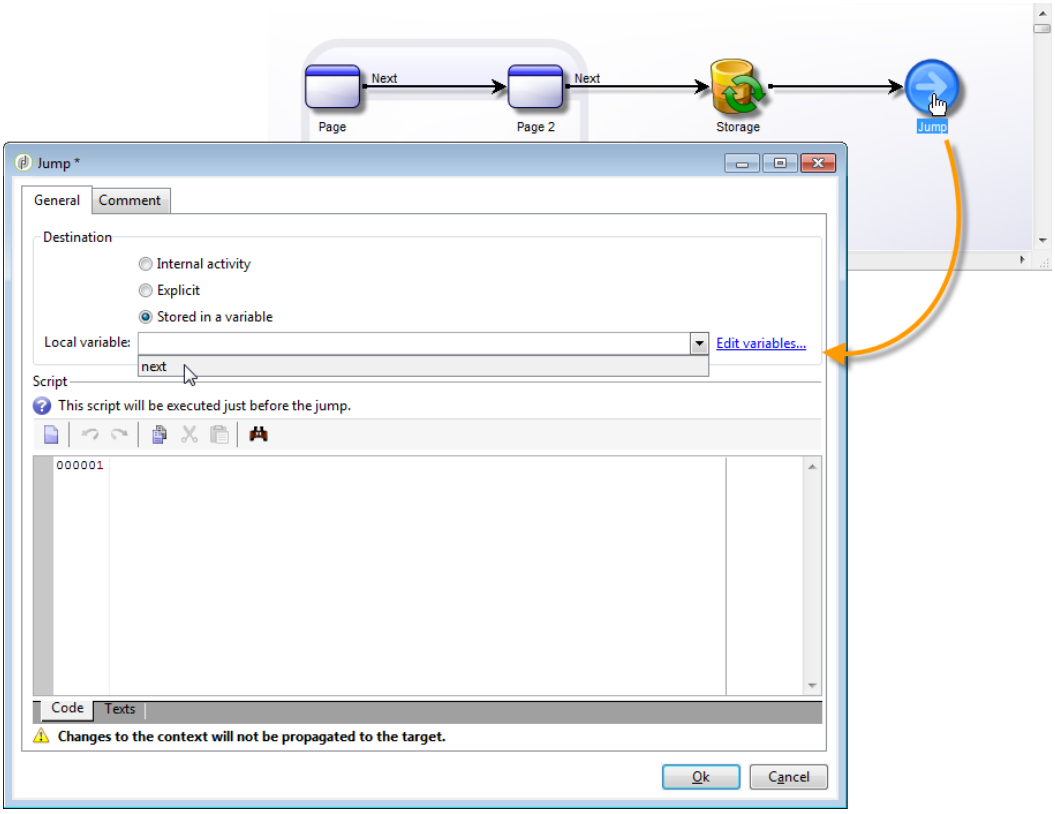
1 Insert a jump at the end of a form: this replaces the **End** box.



2 In the form properties, add a parameter (**next**) stored in a local variable (**next**). Local variables are detailed in Store in a local variable [page 107].



3 Edit the **Jump** object, select the **Stored in a variable** option and select the **next** variable from the drop-down box.



4 The delivery URL must include the internal name of the destination form, for example:

```
http://[myserver]/webForm/APP62?&next=APP22
```

When the user clicks the **Approve** button, form **APP22** is displayed.

Link to another page

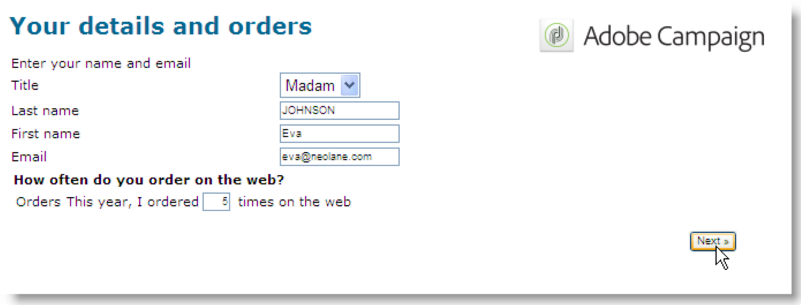
You can insert links to other pages of the form. To do this, add a **Link** type static element to the page. For more on this, refer to Inserting a link [page 72].

Conditional page display

According to responses / values of a field

The **Test** box lets you condition the sequencing of pages in a form. It lets you define various branch lines depending on test results. This enables you to display different pages depending on the answers provided by users.

For example, you can display a different page for customers who have already ordered online, and another for those who have placed over ten orders. To do this, in the first page of the form, insert a **Number** type input field for the user to state how many orders they have placed.

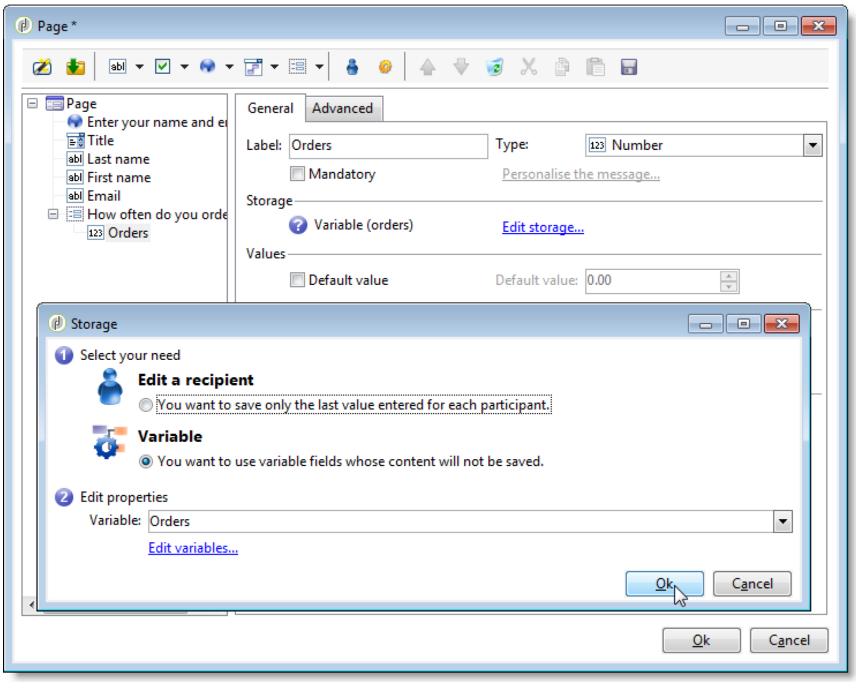


You can either store this information in a field of the database or use a local variable.

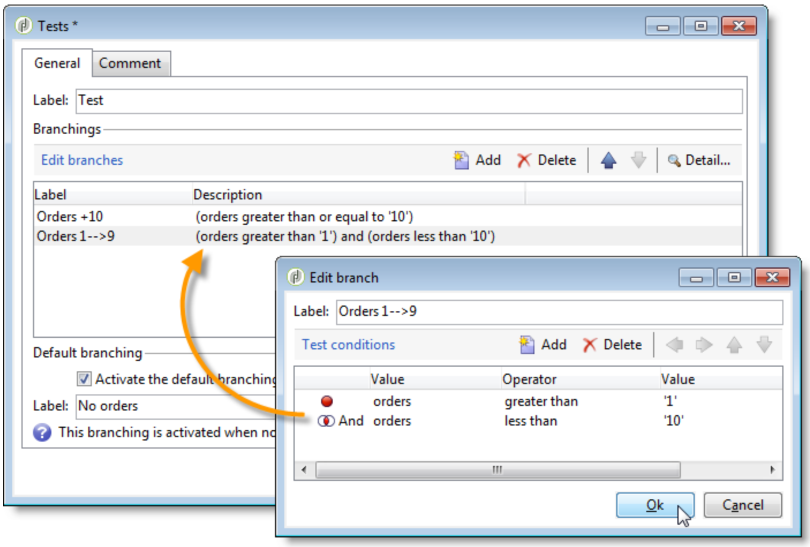
Note:

The storage modes are detailed in Response storage fields [page 106].

In our example, we want to use a variable:

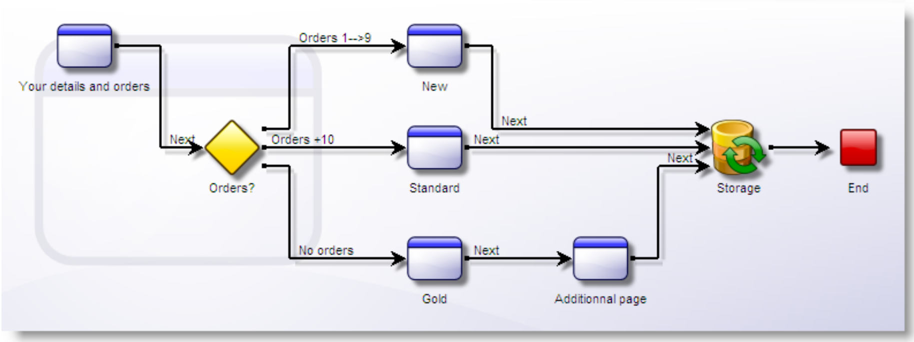


In the diagram of the form, insert a test box in order to define the conditions. For each condition, a new branch will be added at the output of the test box.



Select the **Activate the default branching** option to add a transition for cases where none of the conditions is true. This option is unnecessary if every possible case is covered by the conditions defined.

Next, define the page sequencing when one or other of the conditions is true, for example:



According to the initialization parameters

You can also personalize the page sequencing according to the initialization parameters of the web form or according to the values stored in the database. See URL parameters [page 129].

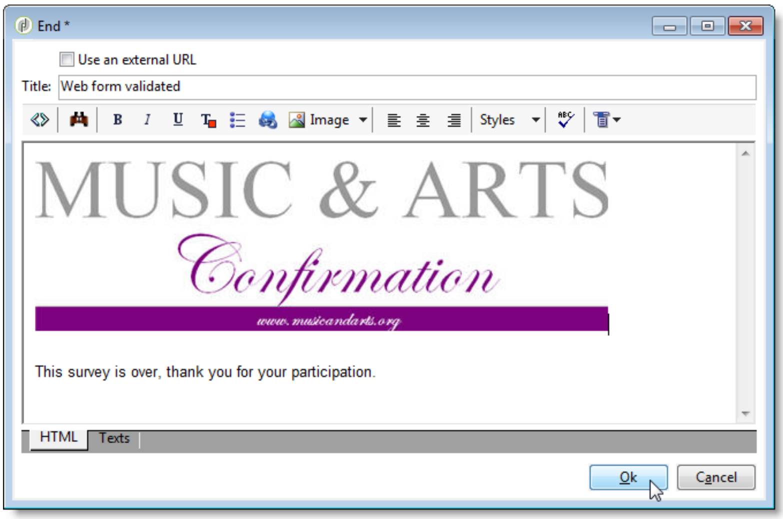
Adding scripts

The **Script** object lets you enter a JavaScript script directly, for example to modify the value of a field, retrieve data from the database, or call an Adobe Campaign API.

Personalizing the end page

You must place an end page at the end of the diagram. The end page is displayed when the user clicks the **Approve** button in the Web form.

To personalize this page, double-click **End** and enter the content of the page in the central editor.



Note:

You can copy and paste existing HTML content. To do this, click **Display source code** and insert the HTML code.

You can use an external URL; to do this, select the corresponding option and enter the URL of the page to be displayed.

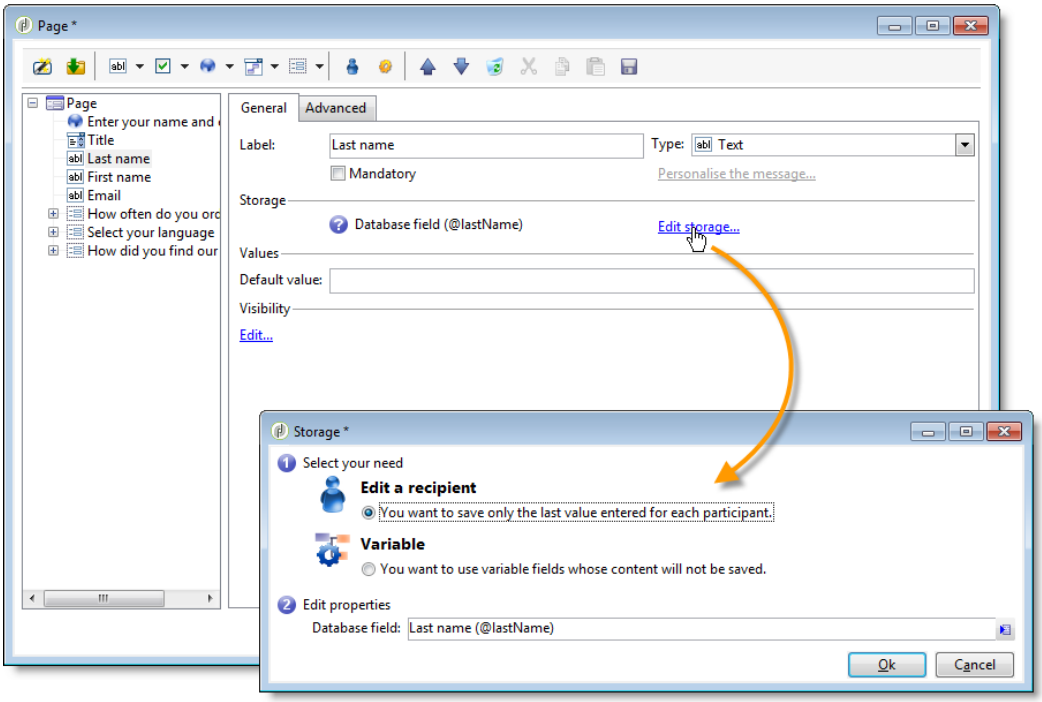
Managing answers

Storing and using collected answers

Response storage fields

Answers to forms can be saved in a field of the database or temporarily in a local variable. The storage mode for answers is chosen during field creation. It can be edited via the **Edit storage...** link.

For each input field in a form, the following storage options are available:



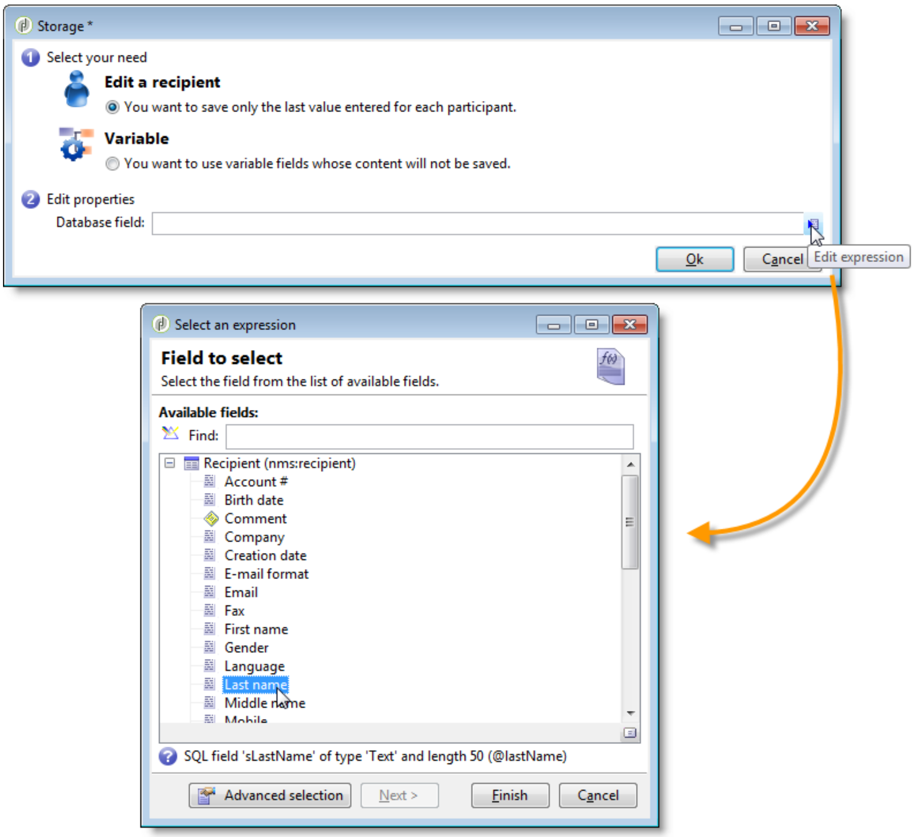
- **Edit a recipient**

  You can select a field of the database: users' answers will be stored in this field. For each user, only the last value entered is saved: it is added to their profile: Refer to Store in a field of the database [page 107].
- **Variable**

  If you don't want to store information in the database, you can use a variable. Local variables can be declared upstream. Refer to Store in a local variable [page 107].

Store in a field of the database

To save the data in an existing field of the database, click the **Edit expression** icon and select it from the list of available fields.



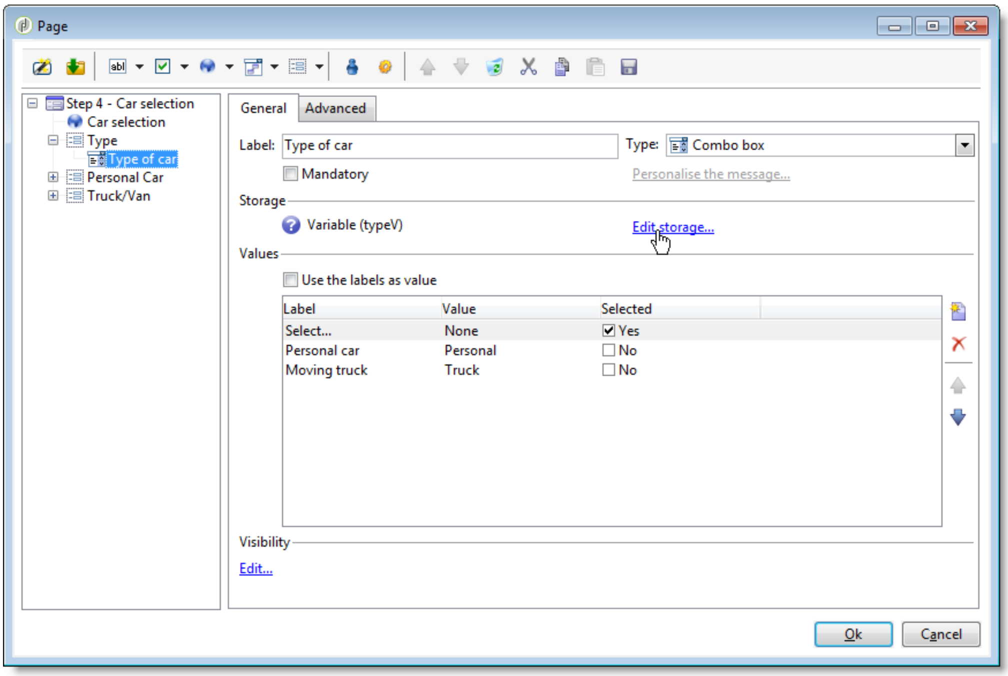
Note:

The default reference document is the **nms:recipient** schema. To view it or to choose a new one, select the form from the list, and click the **Properties** button.

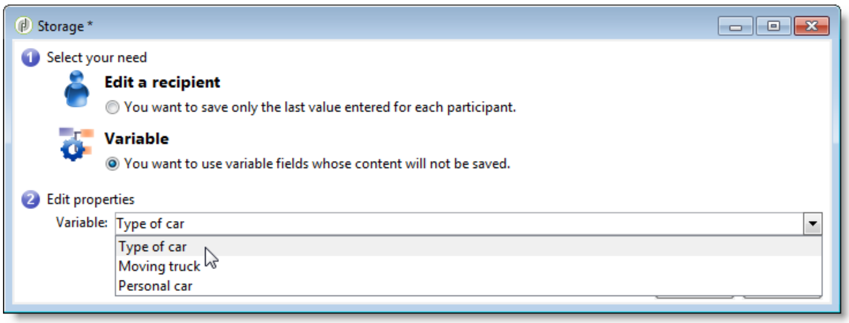
Store in a local variable

You can use local variables so that even if data is not stored in the database, it can be reused on the page or the other pages, for example to place conditions on the display of a field or to personalize a message.

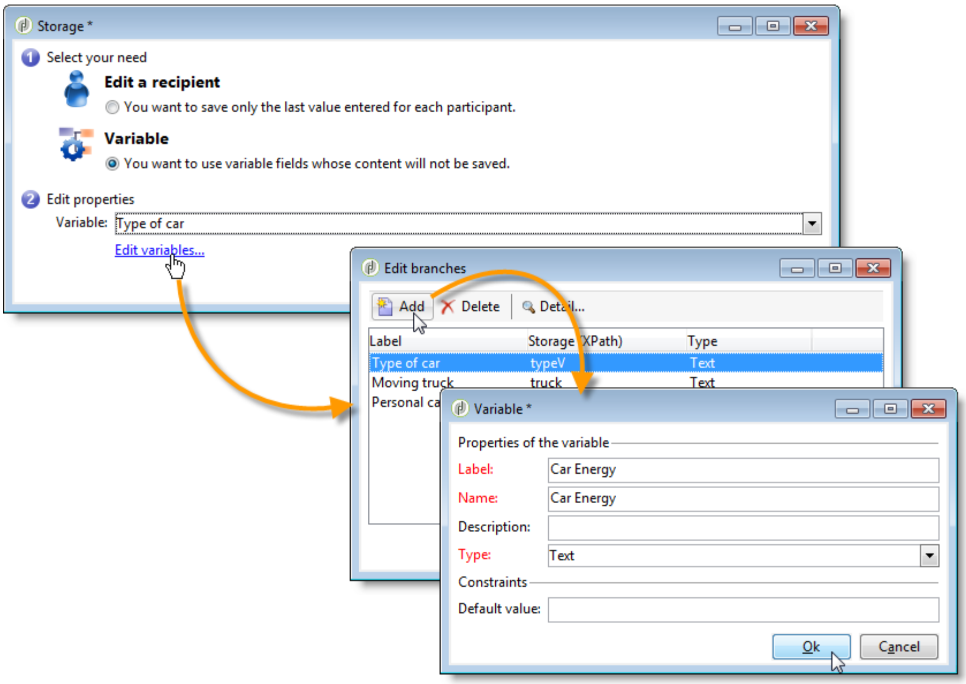
This means that you can use the value of an unsaved field to authorize the display of a group of options on the page. In the page below, the vehicle type is not stored in the database:



It is stored in a variable which must be selected when the drop-down box is created, or via the **Edit storage...** link.



You can display existing variables and create new ones via the **Edit variables...** link. Click the **Add** button to create a new variable.



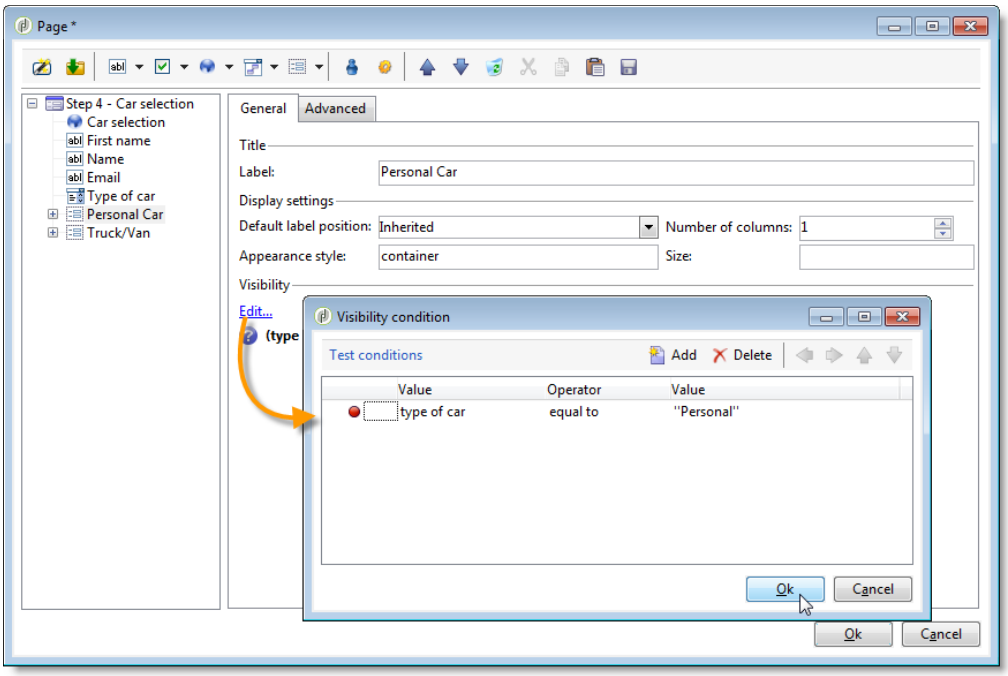
The added variable will be available in the list of local variables when the page's input fields are created.

Note:

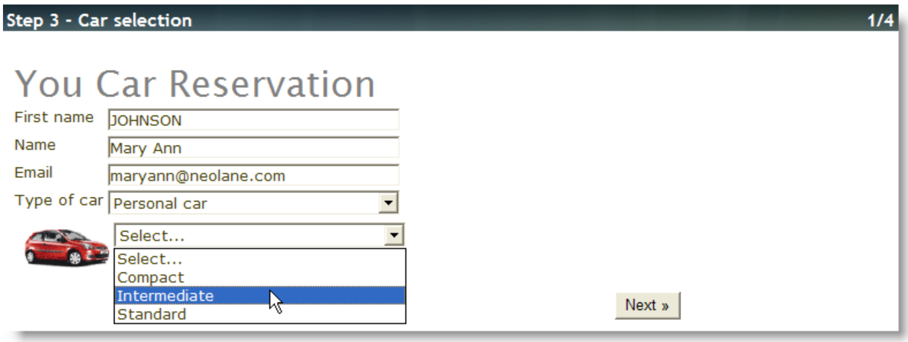
For each form, you can create variables upstream. To do this, select the form and click the **Properties** button. The **Variables** tab contains the local variables for the form.

Example of local storage with conditioning

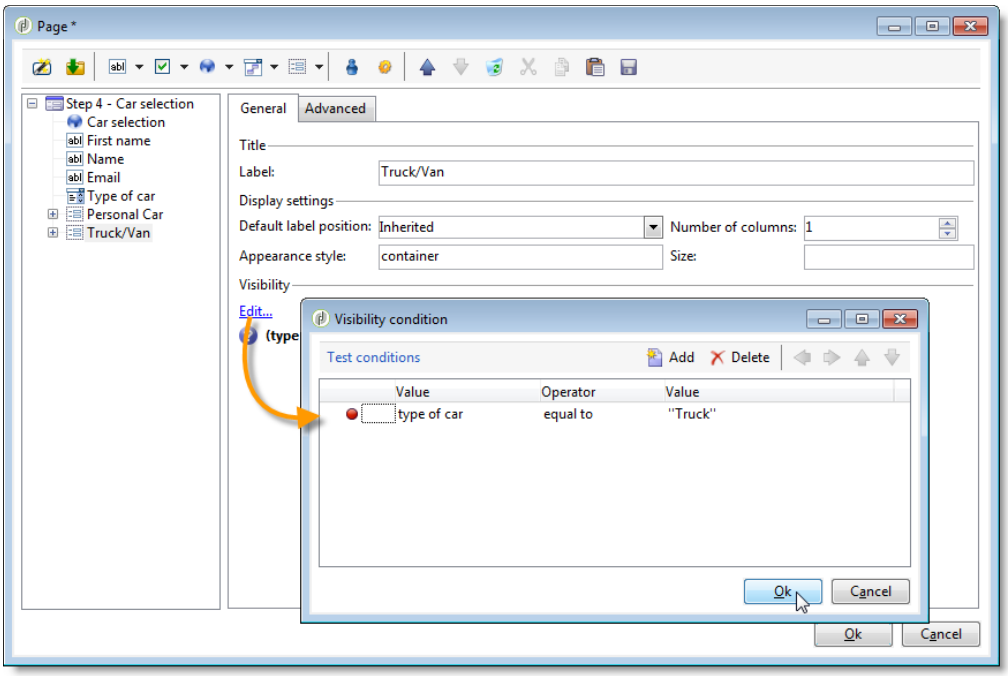
In the above example, the container that includes data concerning private vehicles is displayed only if the **Private** option is selected from the drop-down list, as indicated in the visibility condition:



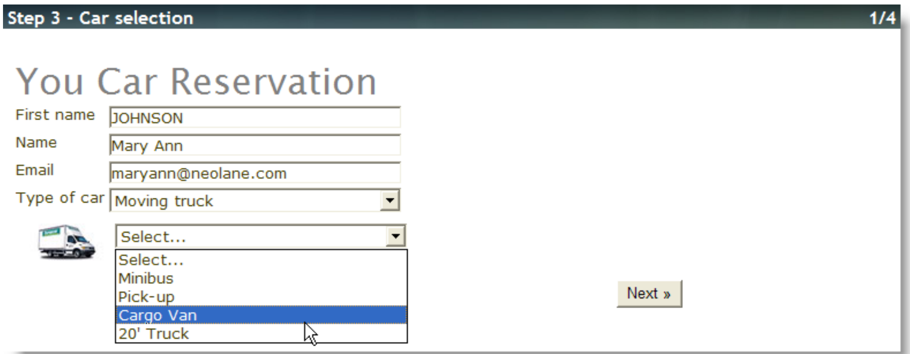
If the user selects a private vehicle, the Web form offers the following options:



The container holding the data concerning commercial vehicles will be displayed if the Professional option is selected, as expressed in the visibility condition:



This means that, if the user selects a commercial vehicle, the form offers the following options:



Use collected information

For each form, the answers provided can be re-used in the fields or the labels. The following syntaxes must be used:

- For a content stored in a field of the database:

```
<%=ctx.recipient.@field name%
```

- For a content stored in a local variable:

```
<%= ctx.vars.variable name %
```

- For a content stored in an HTML text field:

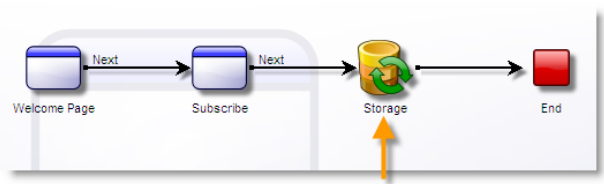
```
<%== HTML field name %
```

Note:

Unlike the other fields for which <%= characters are replaced with escape characters, the HTML content is saved as is by using the <%== syntax.

Saving answers

To save the information collected in the pages of a form, you need to place a storage box in the diagram.



There are two ways of using this box:

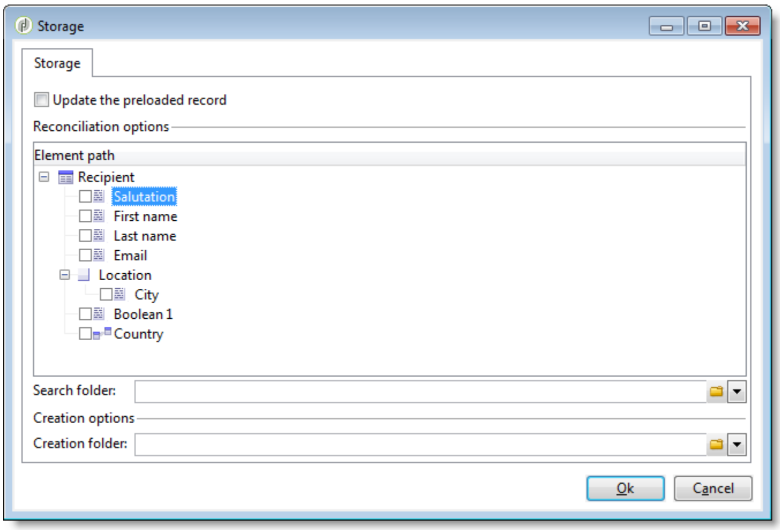
- If the Web form is accessed via a link sent in an email, and if the user accessing the application is already in the database, you can check the **Update the preloaded record** option. For more on this, refer to Delivering a form via email [page 119].

  In this case, Adobe Campaign uses the encrypted primary key of the user profile, a unique identifier assigned to each profile by Adobe Campaign. You need to configure the information to preload via the preloading box. For more on this, refer to Pre-loading the data [page 113].

  Warning:

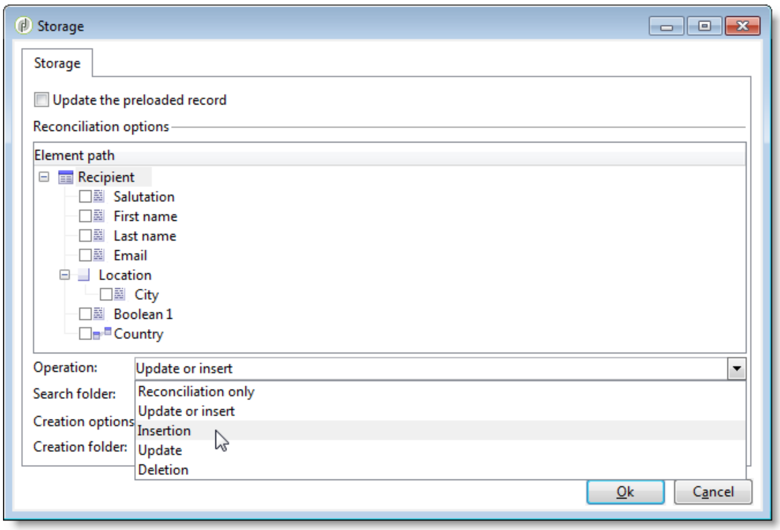
  This option overrides the user data, including the e-mail address if there is a field in which to enter it. It cannot be used to create new profiles, and requires the use of a pre-loading box in the form.

- To enrich the data of recipients in the database, edit the storage box and select the reconciliation key. For internal use (typically an intranet system) or for a form used to create new profiles for instance, you can select the reconciliation field(s). The box offers all fields of the database used in the various pages of the Web application:



By default, the data is imported into the database by an **Update or insertion** operation: if it exists in the database, the element is updated (for example, the selected newsletter or the e-mail address entered). If it does not exist, the information is added.

You can, however, change this behavior. To do this, select the root of the element and select the operation to be performed from the drop-down list:



You can select a search folder for reconciliation and the creation folder for new profiles. If these fields are empty, the profiles are searched for and created in the operator's default folder.

Note:

Possible operations are: **Simple reconciliation**, **Update or insertion**, **Insertion**, **Update**, **Deletion**.

The default folder of the operator is the first folder for which the operator has write-permission.

Refer to the "Administration elements" chapter of the Platform guide.

Delivering a Web form

Pre-loading the data

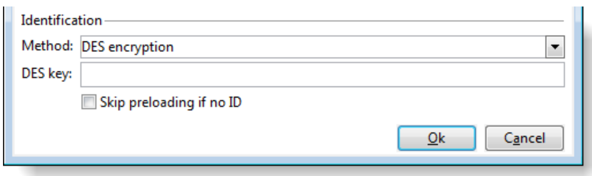
If you wish to update the profiles stored in the database via a Web form, you can use a preloading box. The preloading box lets you indicate how to find the record to be updated in the database.

The following identification methods are possible:

- **Adobe Campaign Encryption**

  This encryption method uses the encrypted Adobe Campaign identifier (ID). This method is only applicable on an Adobe Campaign object and the encrypted ID may only be generated by the Adobe Campaign platform.

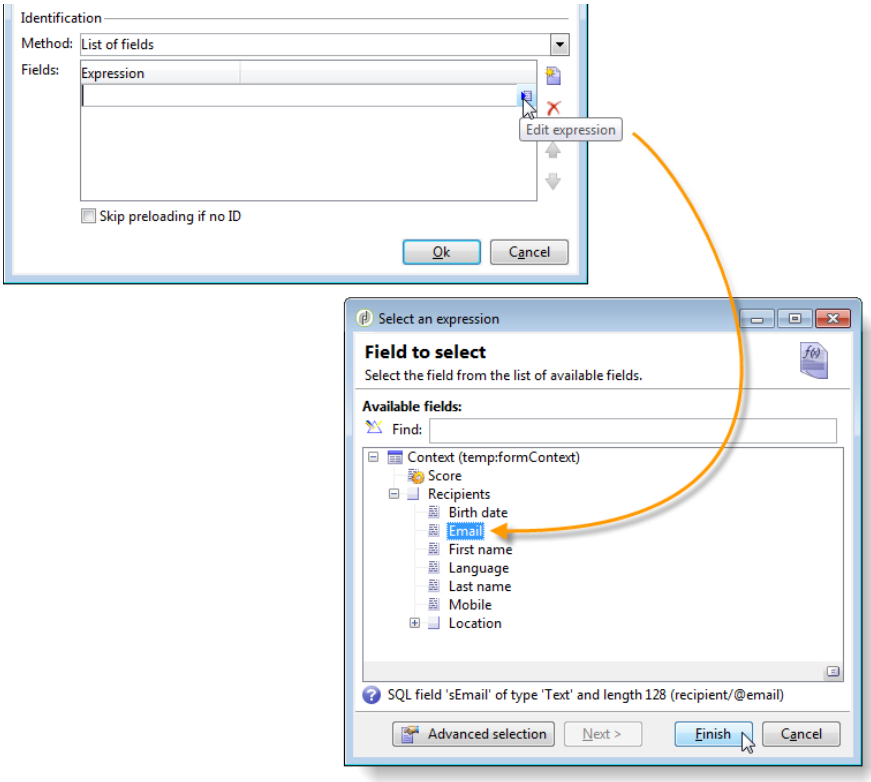
  When using this method, you need to adapt the URL of the form to deliver to the email address by adding the *<%=escapeUrl(recipient.cryptedId) %>* parameter. For more on this, refer to Delivering a form via email [page 119].
- **DES encryption**



This encryption method uses an identifier (ID) provided externally, linked to a key shared by Adobe Campaign and the external provider. The **Des key** field lets you enter this encryption key.

- **List of fields**

  This option lets you choose from the fields in the current context of the form, those that will be used to find the corresponding profile in the database.



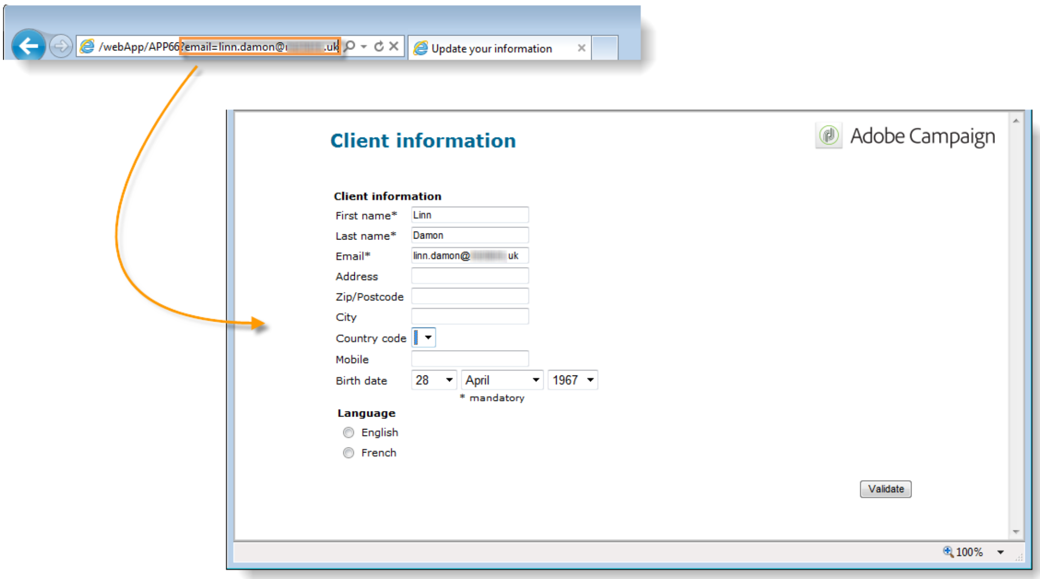
Fields can be added to the form properties via the **Parameters** tab (refer to Adding parameters [page 130]). They are placed in the form URL or input zones.

Warning:

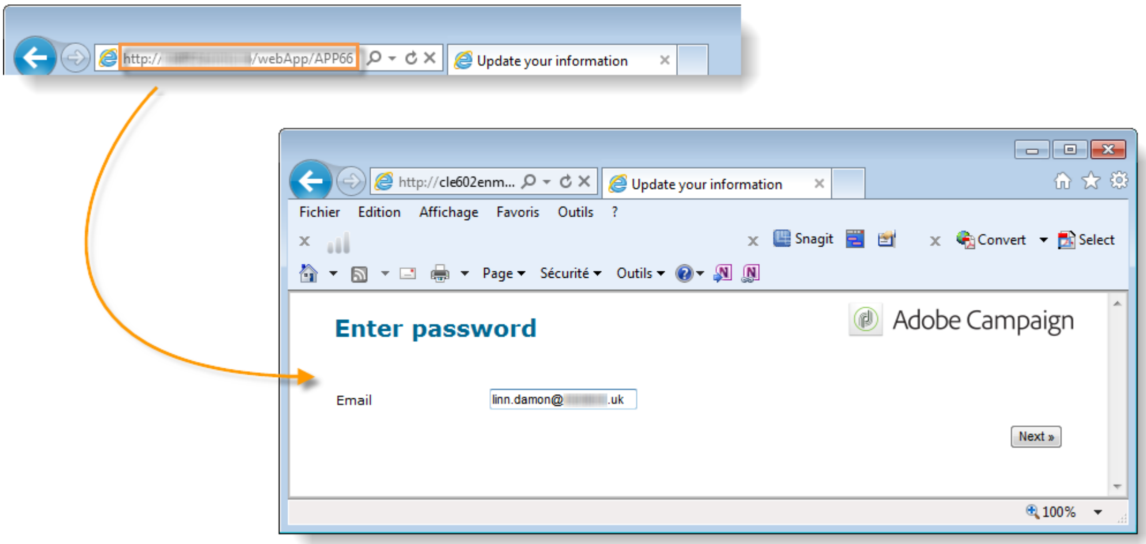
The data in the selected fields isn't encrypted. It must not be provided in an encrypted form because Adobe Campaign will not be able to decrypt it if the **Field list** option is selected.

In the following example, profile preloading is based on the email address.

The URL can include the unencrypted email address, in which case users have direct access to the pages that concern them.



If not, they will be asked for their password.



Warning:

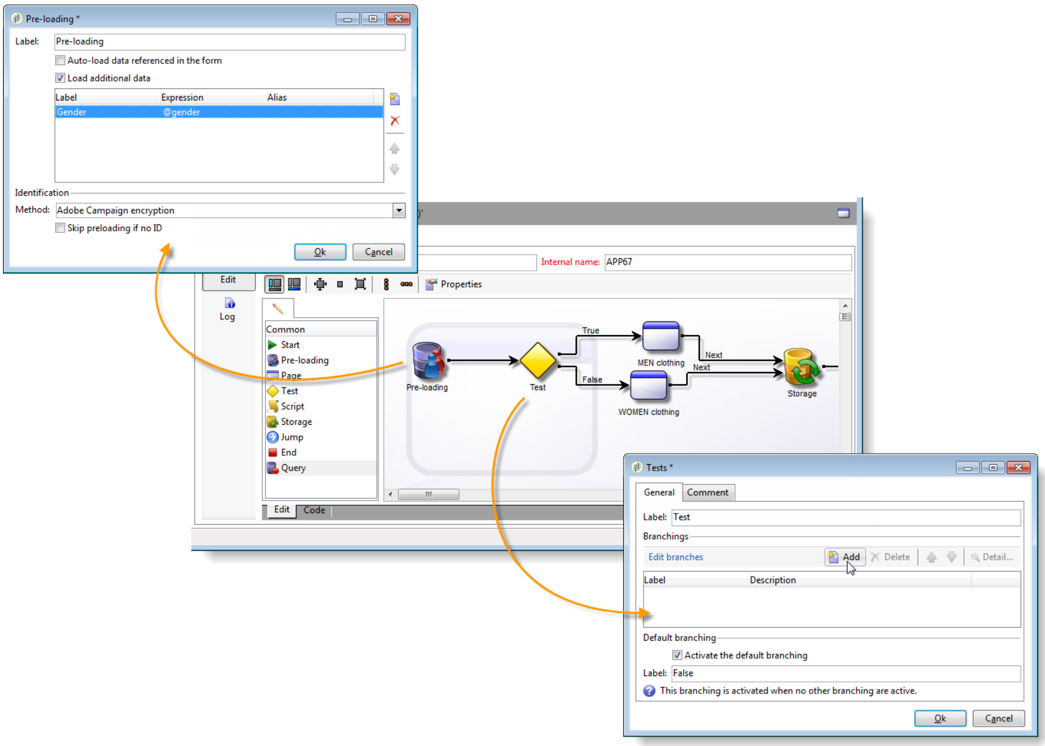
- If several fields are specified in the list, the data of **ALL FIELDS** must match the data stored in the database in order for the profile to be updated. Otherwise, a new profile is created.
- This function is particularly useful for Web applications but not recommended for public forms. The selected access control option must be "Enable access control".

The **Skip preloading if identification is empty** option must be selected if you do not wish to update profiles. In this case, each profile entered will be added to the database after approval of the form. This option is used, for example, when the form is posted on a website.

The **Auto-load data referenced in the form** option lets you automatically preload the data that matches input and merge fields in the form. However, data referenced in **Script** and **Test** activities is not concerned. If this option isn't selected, you need to define the fields using the **Load additional data** option.

The **Load additional data** option lets you add information which is not used in the pages of the form, but will nonetheless be preloaded.

You can, for example, preload the gender of the recipient and automatically direct him or her to the appropriate page via a test box.



Managing delivery and tracking

Once the form has been created, configured and published, you can deliver it and track the user responses.

Life cycle of a form

There are three stages in the life cycle of a form:

1. **Form Being edited**

   This is the initial design phase. When a new form is created, it is in the editing phase. Access to the form, for testing purposes only, then requires the parameter **__uuid** to be used in its URL. This URL is accessible in the **Preview** sub-tab. See URL parameters [page 129].

   Warning:

   As long as the form is being edited, its access URL is a special URL.

2. **Form Online**

   Once the design phase is complete, the form can be delivered. First, it needs to be published. For more on this, refer to Publishing a form [page 118].

   The form will be **Live** until it expires.

   Warning:

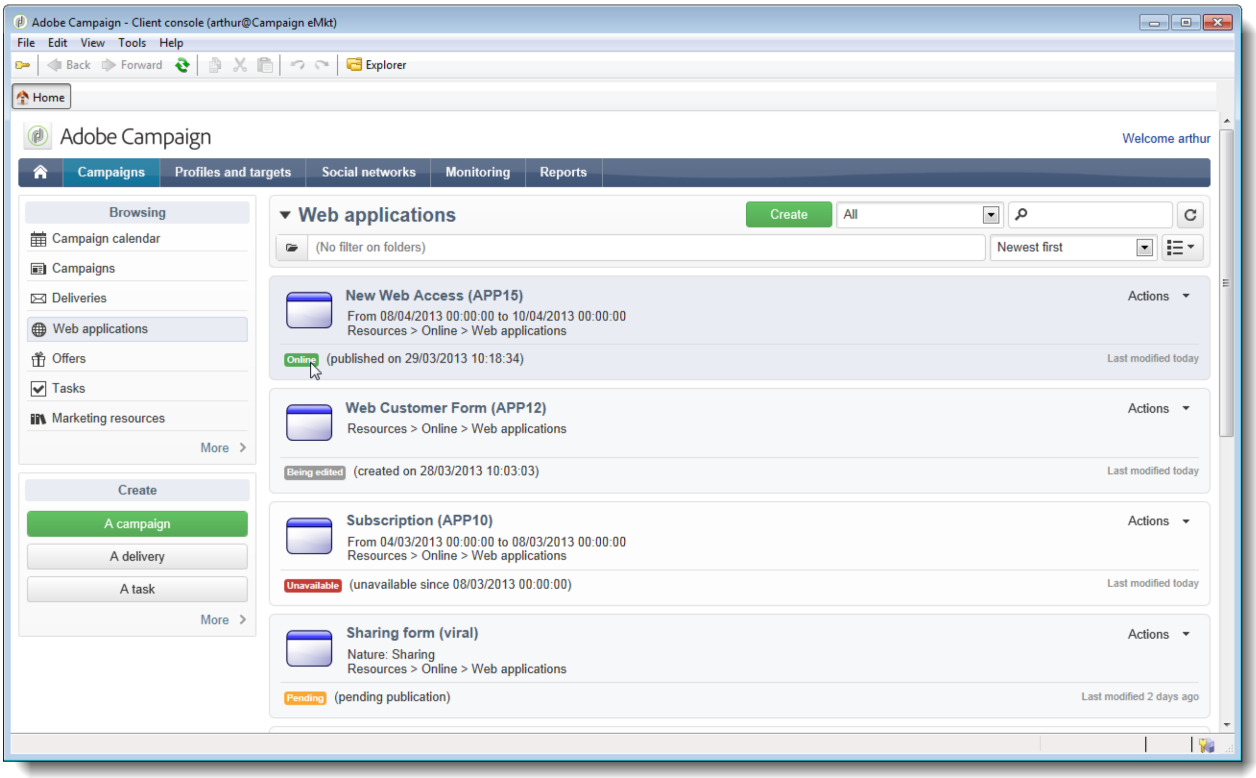
   To be delivered, the URL of the survey must not contain the **__uuid** parameter.

3. **Form Unavailable**

   Once the form is closed, the delivery phase is over and the form becomes unavailable: it is no longer accessible to users.

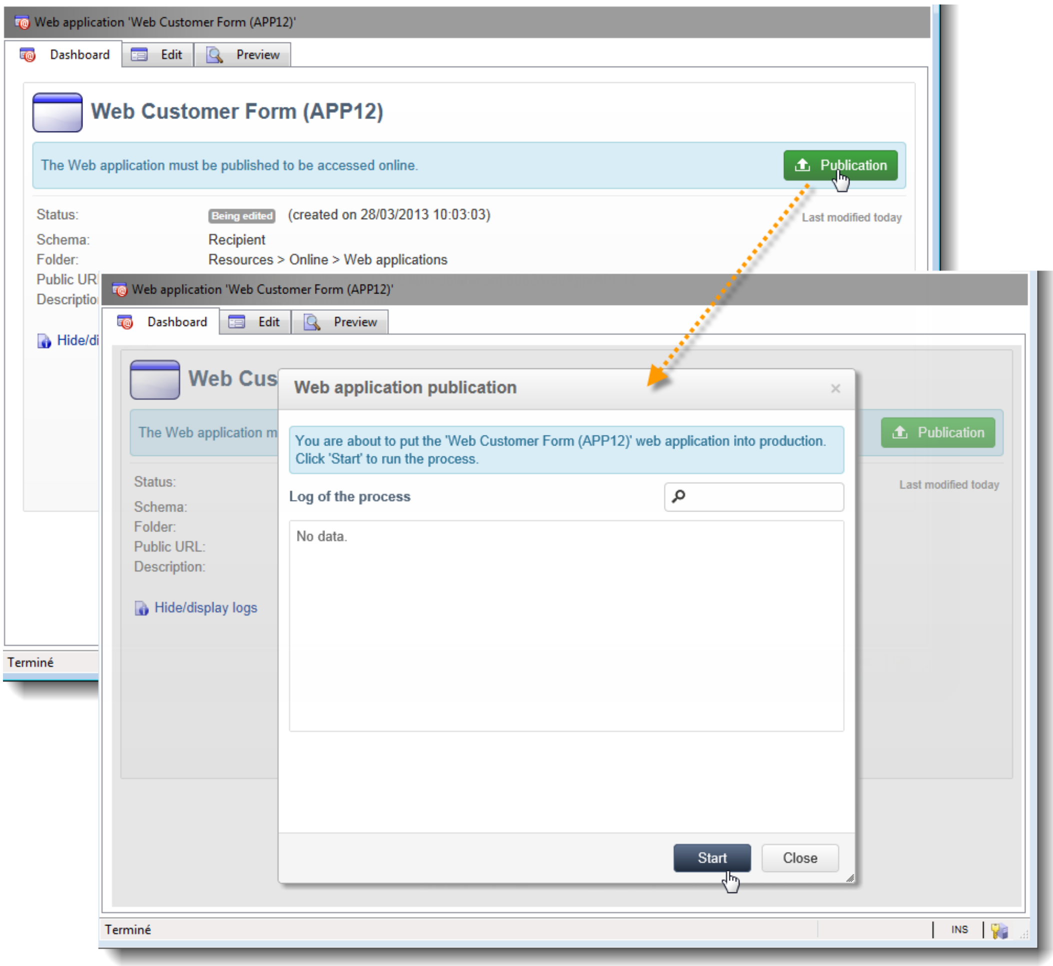
The expiry date can be defined in the form properties window. For more on this, refer to Making a form available online [page 118]

The publication status of a form is displayed in the list of forms.



Publishing a form

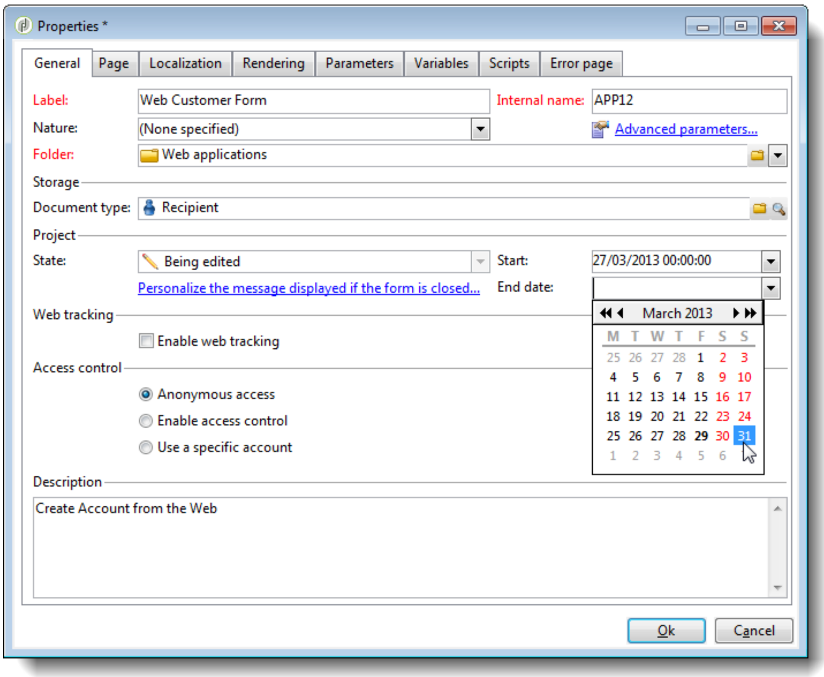
To change the state of a form, you need to publish it. To do this, click the **Publication** button above the list of Web forms and select the state in the drop-down box.



Making a form available online

To be accessed by users, the form must be in production and started, i.e. within its validity period. The validity dates are entered via the **Properties** link of the form.

- Use the fields in the **Project** section to enter start and end dates for the form.



- Click the **Personalize the message displayed if the form is closed...** link to define the error message to display if the user tries to access the form while it isn't valid.

  See Accessibility of the form [page 127].

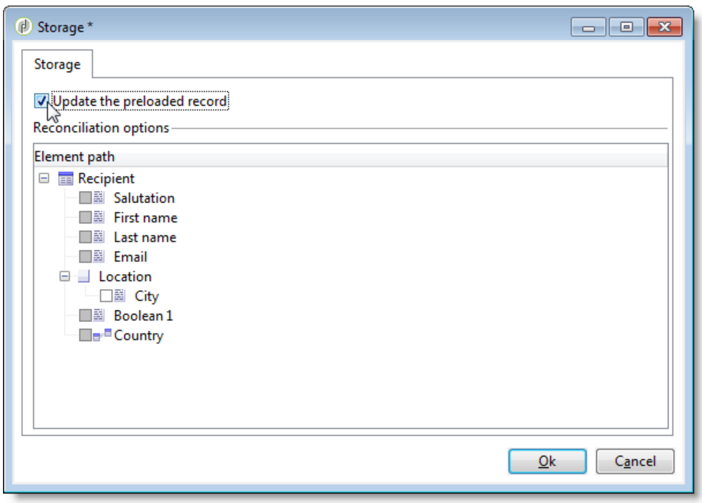
Delivering a form via email

When you deliver an invitation via email, you can use the **Adobe Campaign Encryption** option for data reconciliation. To do this, go to the delivery wizard and adapt the link to the form by adding the following parameter:

```
<a href="http://server/webForm/APP264?&id=<%=escapeUrl(recipient.cryptedId) %>">
```

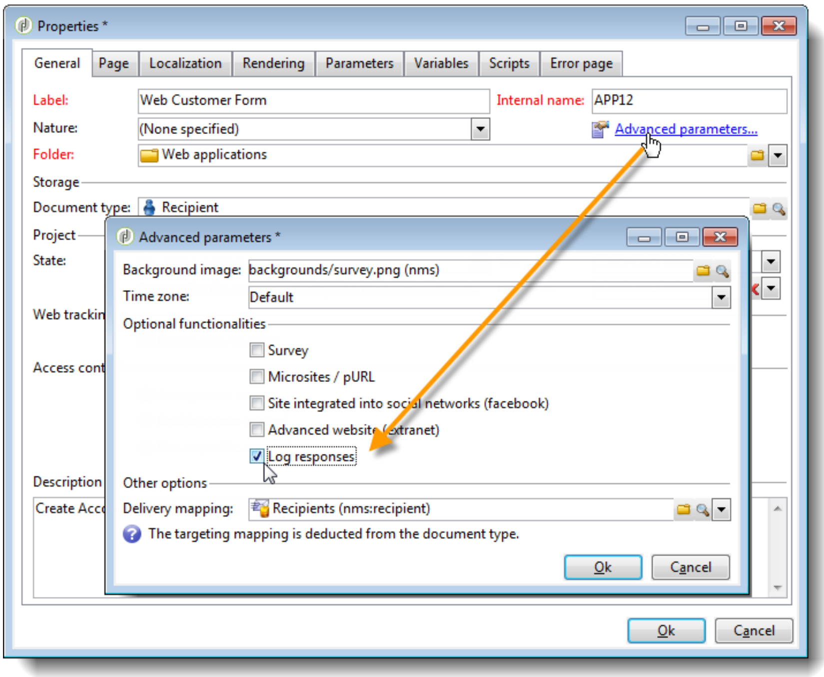
In this case, the reconciliation key for data storage must be the recipient's encrypted identifier. For more on this, refer to Pre-loading the data [page 113].

In this case, you need to check the **Update the preloaded record** option in the record box. For more on this, refer to Saving answers [page 112].

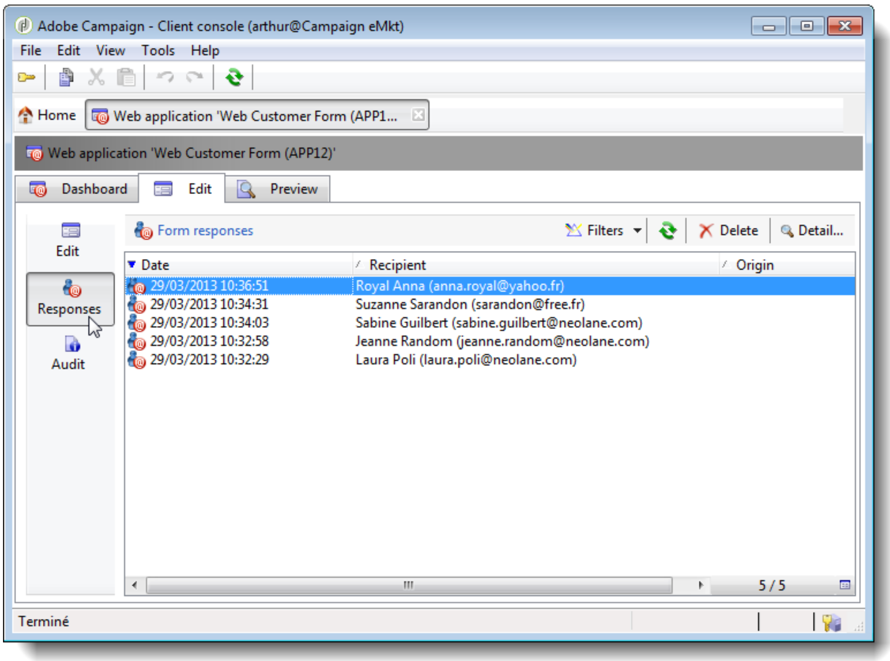


Tracking answers

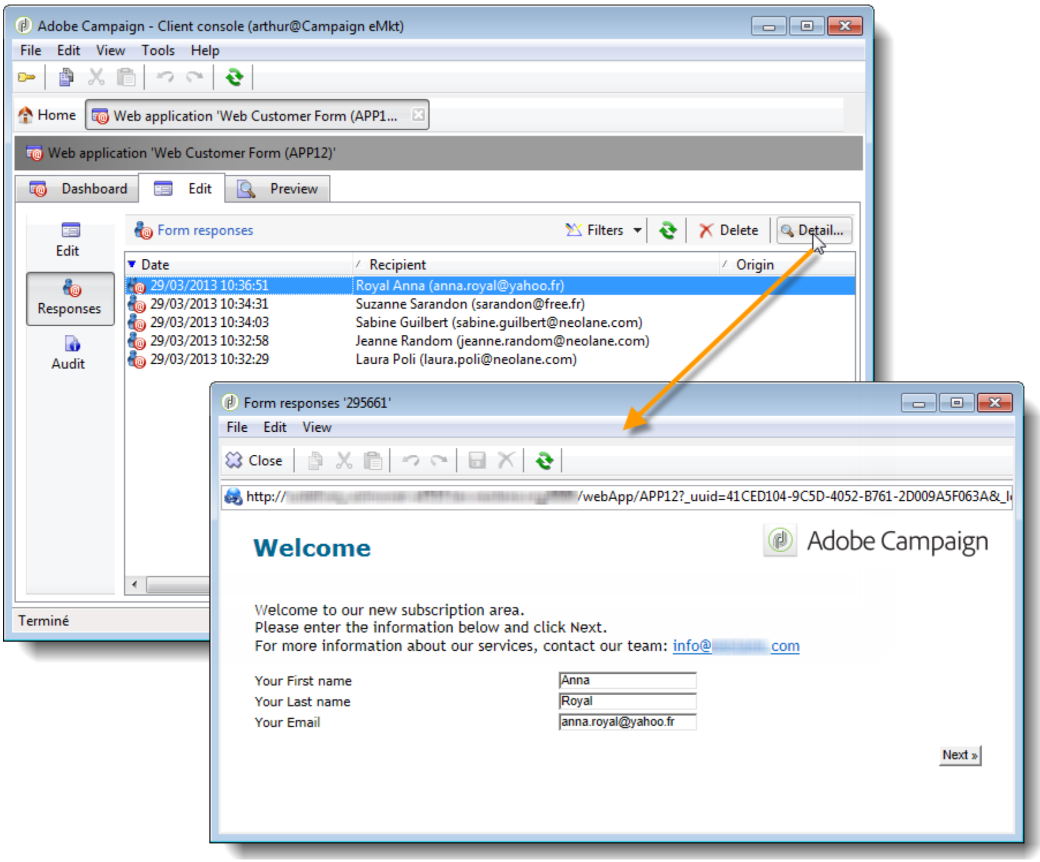
Response tracking can be activated in a dedicated tab to monitor the impact of your Web form. To do this, click the **Advanced parameters...** link in the form properties window and select the **Log responses** option.



The **Responses** tab appears to let you view the identity of respondents.



Select a recipient and click the **Detail...** button to view the responses provided.



You can process the response logs provided in queries, for instance to target only non-respondents when sending reminders, or to offer specific communications to respondents only.

Note:

For a complete tracking of the responses provided, export the responses and view or create dedicated reports, use the optional **Survey** module. For more on this, refer to Overview [page 187].

Configuring Web forms

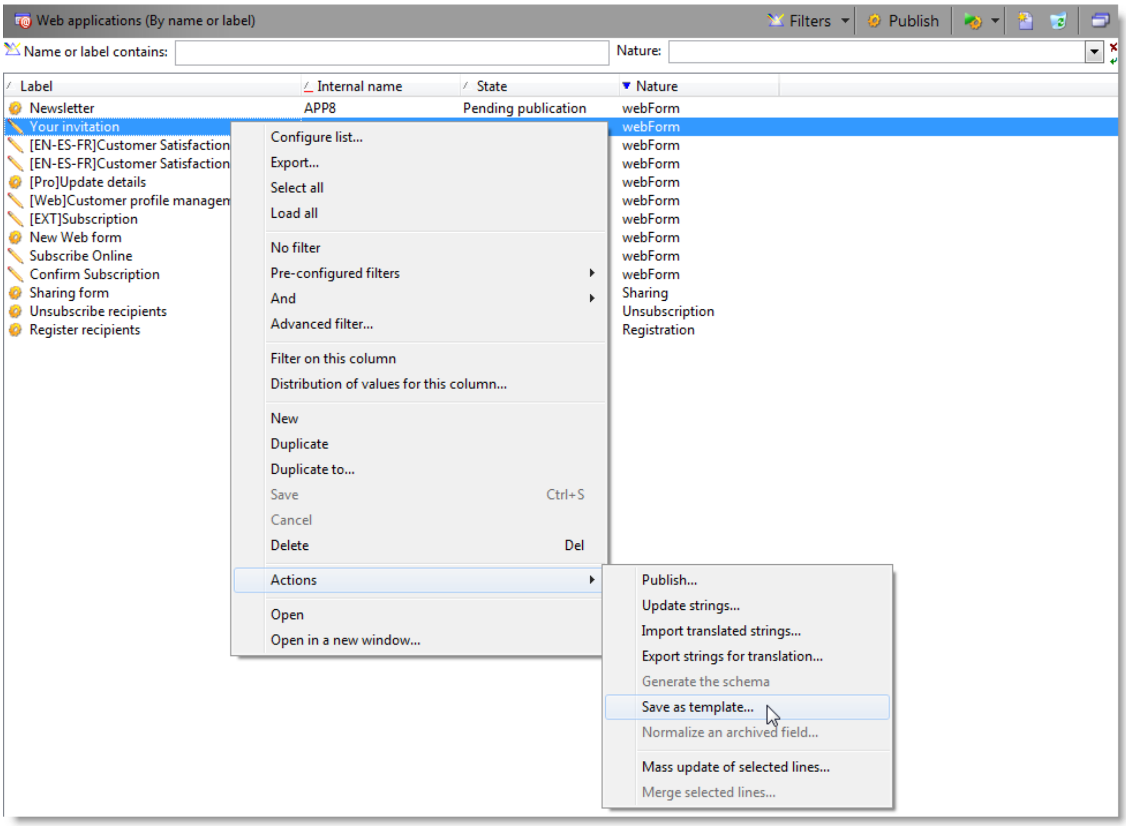
Creating a Web form template

Form templates are re-usable configurations which let you create new forms. By default, form templates are stored with Web application templates in the **Resources** > **Templates** > **Web application templates** node.

From here you can either create new templates or change an existing form into a template.

Changing an existing form into a template

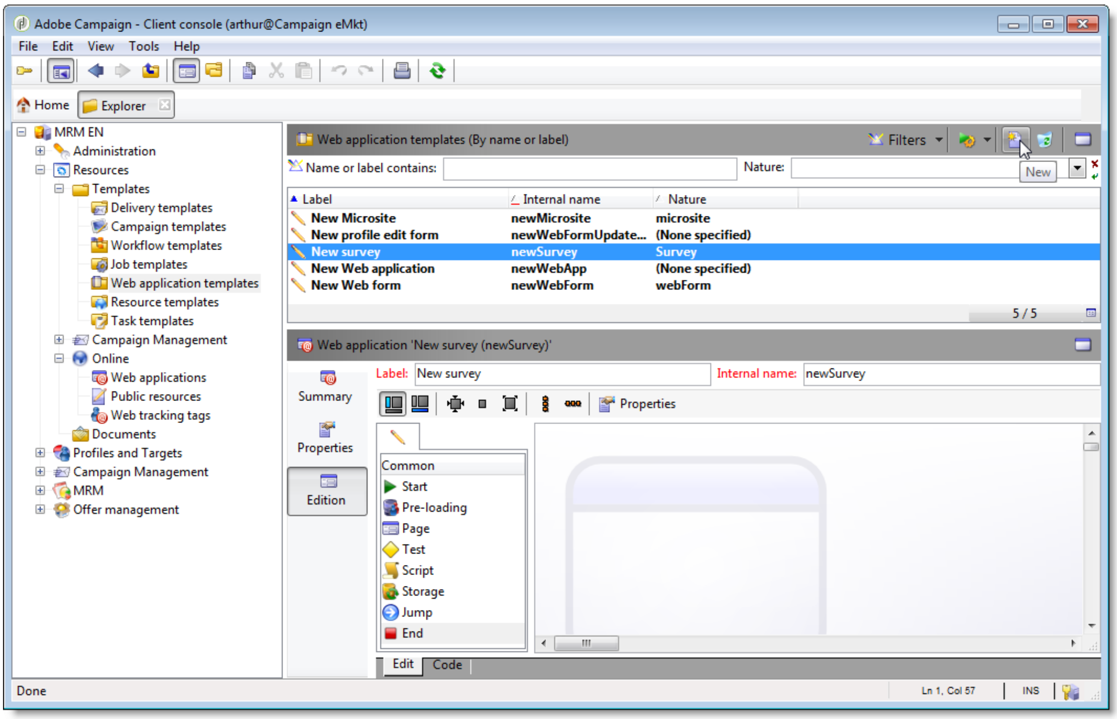
A form can be changed into a template and its configuration re-used. To do this, select the form, right-click and select **Actions > Save as template...**.



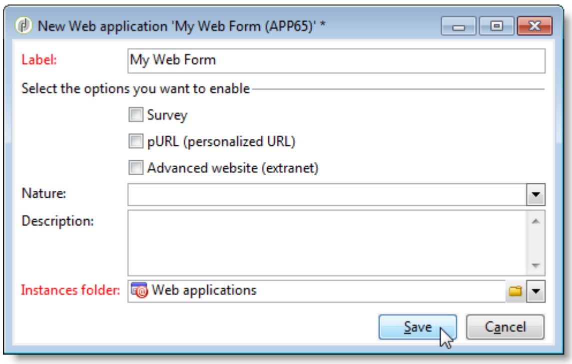
This action opens the window for creating Web applications. You can enter the name and description of the template and select the folder where it will be saved.

Creating a new template

To create a Web form template, right-click the list of Web application templates and select **New**. You can also use the **New** button above the list of templates.



Enter the name of the template. In the **Instance folder** field, select the folder where the Web forms created based on this template are saved. The **Nature** field lets you add descriptive information to sort and/or filter your various web application templates.



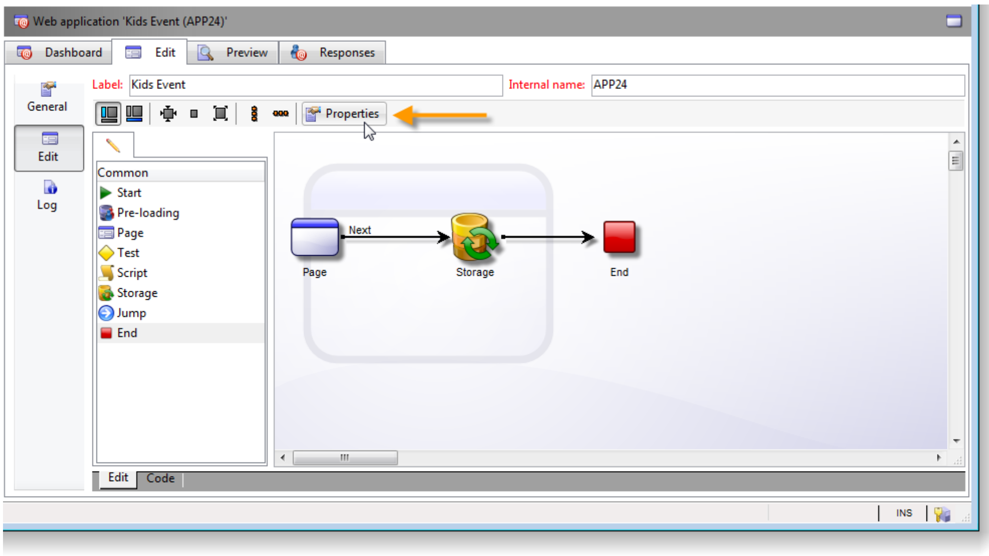
Click the **Save** button to create the template, then build the content of this template and define its parameters.

You may now select this template when creating a new form.

Defining form properties

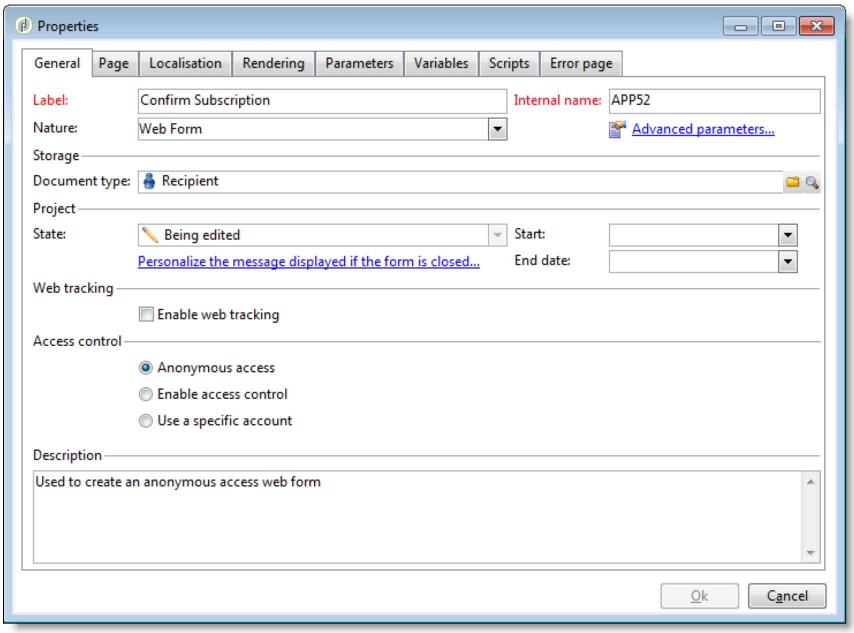
Web forms are fully configurable and personalizable to satisfy your requirements. The parameters must be entered in the properties window.

The properties window is accessible via the **Properties** button in the toolbar of the Web form. This window lets you access a range of settings specific to the Web form. Some settings may stem from template configuration.



Overall properties

In the **General** tab of the properties window, you can modify the **Label** of the form. It is strongly recommended not to change the **Internal name**.



The form template is chosen during form creation. It cannot be changed later. For more on creating and managing form templates, refer to Creating a Web form template [page 121].

Data storage

The fields of Web forms are stored in the recipients table by default. You can change the table used by selecting a new table from the **Document type** field. The **Zoom** icon lets you view the content of the selected table.

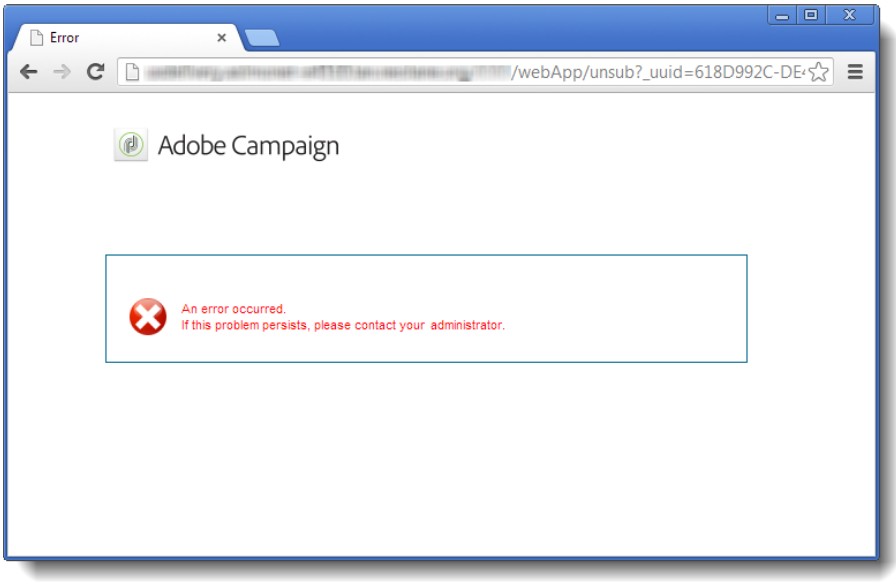
By default, answers are stored in the **Answer to a recipient form** table.

Error page

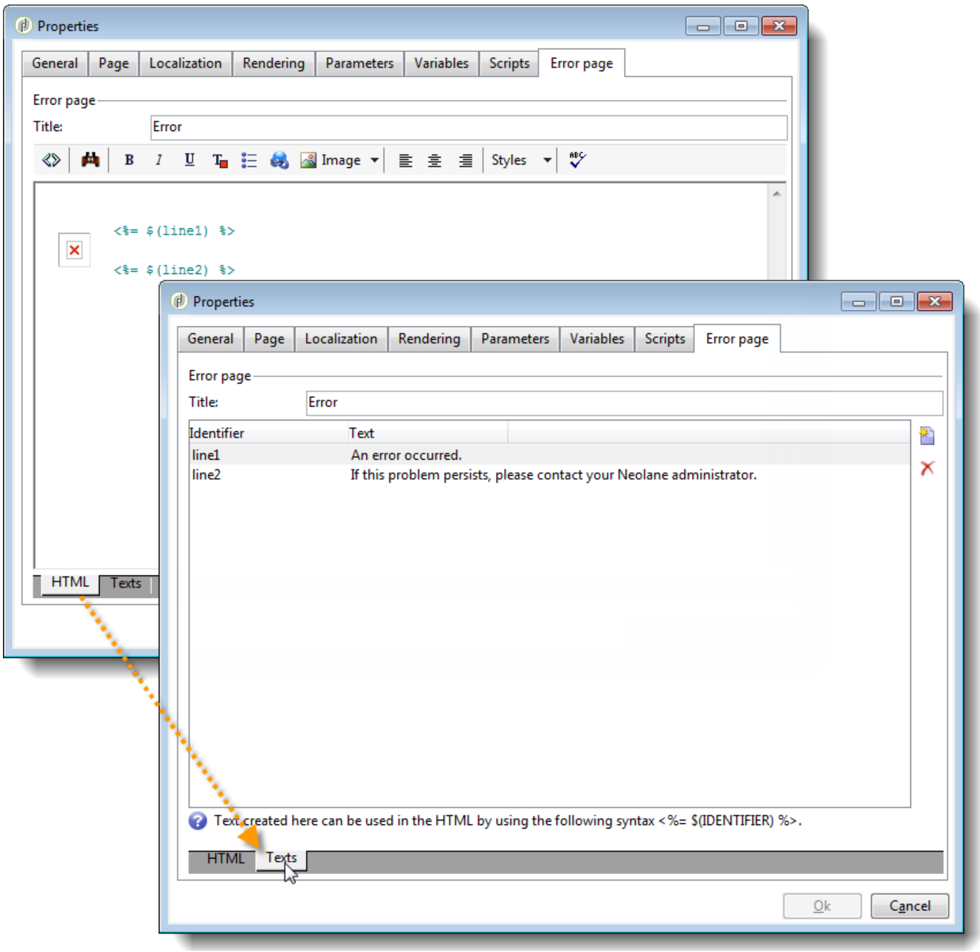
You can configure an error page: this page will be displayed in case of errors during form execution.

The error page is defined in the corresponding tab of the form properties window.

By default, it displays the following information:



The content of the strings displayed is defined in the **Error page** tab of the properties window. The **HTML** tab displays the rendering and the **Texts** tab lets you modify the text strings and add some text if necessary:



Localization

The **Localization** tab lets you select the design and display languages for the Web form.

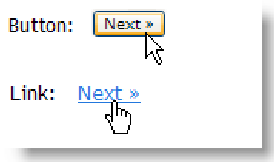
See Translating a form [page 132].

Display settings

Browsing and rendering

The **Rendering** tab lets you define the type of browsing between pages of the Web form and the rendering template used.

You can choose to navigate via links or buttons.



Buttons are the navigation elements by default. They let you perform the following actions:

- Approve the current page and display the next page by clicking **Next**. This button is displayed on all pages except the last.
- Display the previous page by clicking **Previous**. This button is displayed on all pages except the first.
- Save the form responses by clicking the **Approve** button. This button is only shown on the last page.

These elements are displayed at the bottom of each page. Their positions can be changed. To do this, you must modify the style sheet.

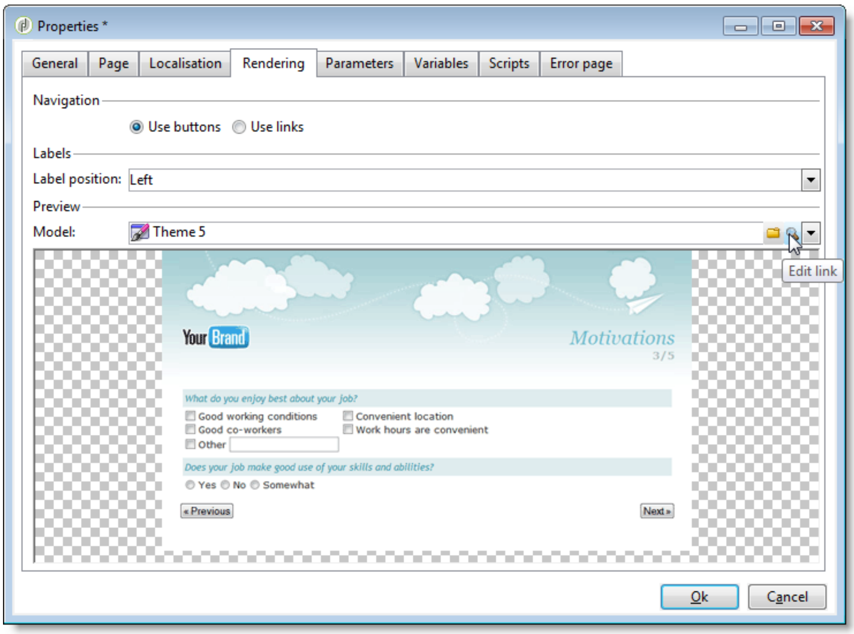
Note:

It's possible to hide the **Previous** button on some pages. To do this, go to the concerned page and check the **Disallow returning to the previous page** option. This option is accessible when the root of the page tree is selected.

The **Template** field of the **Rendering** tab lets you select a theme from those available.

Themes are saved in the **Administration>Configuration>Form rendering** node of the tree. See Selecting the form rendering template [page 88]

A sample rendering is displayed in the lower part of the properties window. The **Edit link** icon lets you view the configuration for the selected theme.



Texts in the form

The **Page** tab lets you define the content of the form header and footer. See Define headers and footers [page 92].

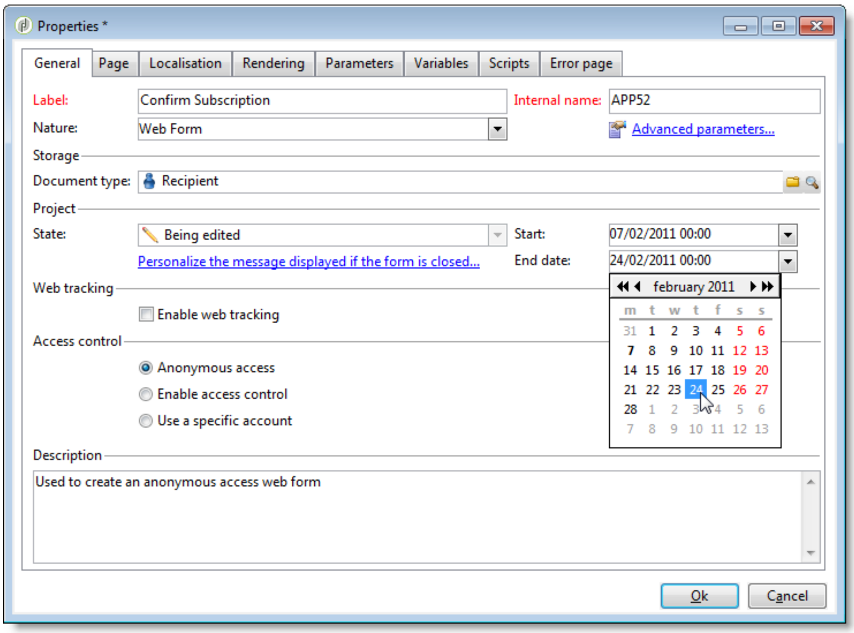
It also lets you manage translations. See Translating a form [page 132].

Access parameters

Accessibility of the form

A Web form is accessible to users if it is **Online** and if the current date is within its validity period. The status of the form is modified during the publication stage (see Publishing a form [page 118]). The status is displayed in the **Project** section of the **General** tab of the properties window.

The validity period runs from the **Start** date to the **End date**. If no dates are specified in these fields, the form has permanent validity.



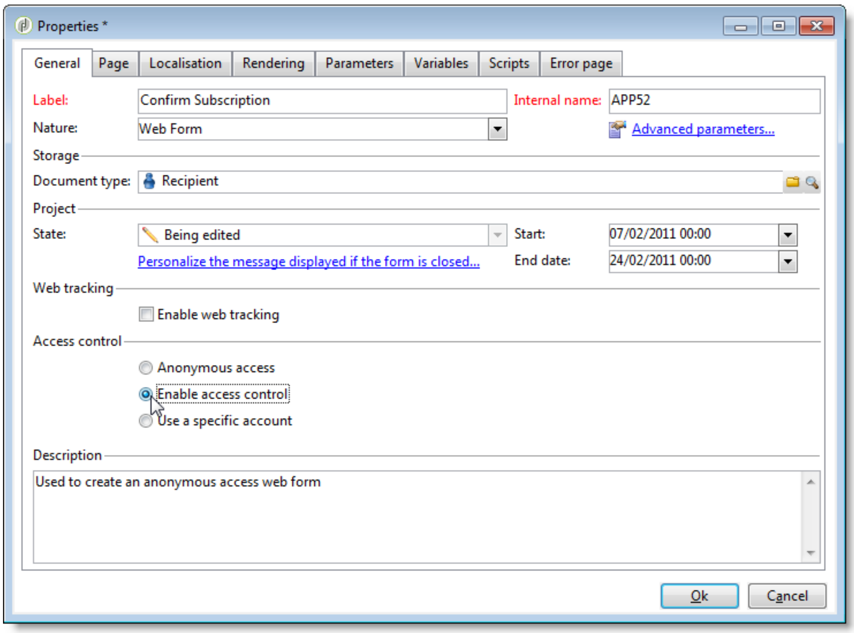
Note:

If the form is closed, and therefore its validity period has not been reached or has expired, or if it was closed by the Adobe Campaign operator, a message is displayed when the user attempts to access it. You can personalize this message by clicking **Personalize the message displayed if the form is closed...**.

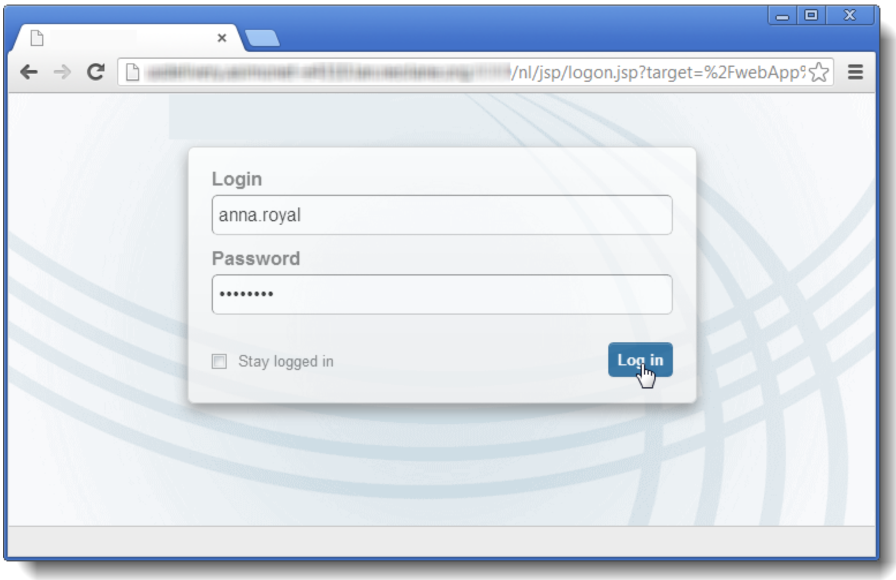
Access control

By default, access to the Web forms is carried out in anonymous mode: all operators who access the form are assigned WebApp operator rights.

You can enable access control for the display of the form, for example when delivering a form on an intranet site, in order to authenticate users. To do this, display the **Properties** window of the concerned form and click the **Enable access control** option, as shown below:

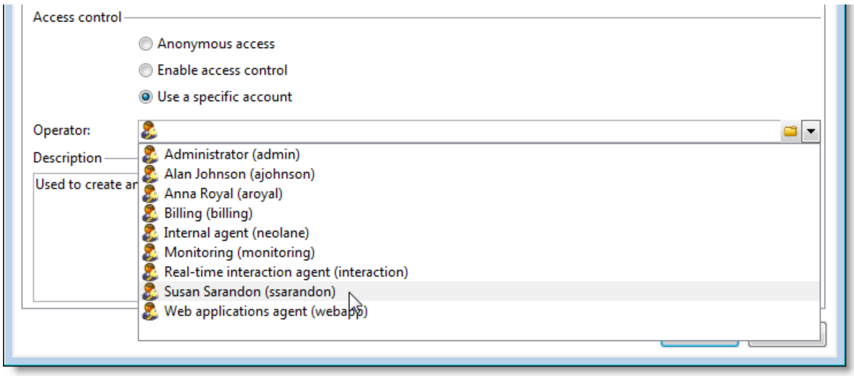


When the page is accessed, the following authentication form will come up:



Login and password are those used by Adobe Campaign operators. For more on this, refer to the "Administration elements" chapter of the Platform guide.

The **Use a specific account** option lets you limit the read or write permission of the operator who accesses the form. Use the drop-down box to select an operator or group of operators who will be in charge of granting these permissions.



URL parameters

You can add additional parameters in the URL of a form to personalize its content and initialize a context (language, encrypted recipient ID, company, calculated formula stored in a variable, etc.). This lets you give access to one form via several different URLs and personalize page content based on the value of the parameter(s) indicated in the URL.

By default, Adobe Campaign offers parameters for previewing the form and checking errors. You can create new settings linked to the form, which may use the values of a field in the database or of a local variable.

Standard parameters

The following parameters are available by default:

- **id** to indicate the encrypted identifier.
- **lang** to change the display language.
- **origin** to specify the origin of the respondent.
- **_uuid** enables form viewing before publication and error tracking. This parameter is for internal use (creation and debug): when you access the Web form via this URL, the records created aren't taken into account in the tracking (reports). The origin is forced to the **Adobe Campaign** value.

  Is used with the **_preview** parameters and/or **_debug**.

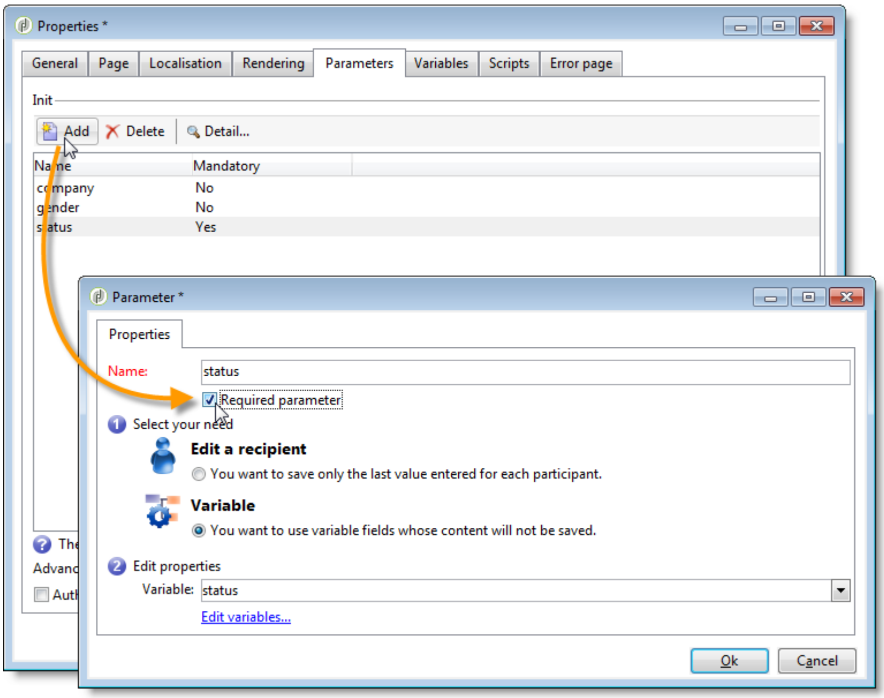
  - **_preview** to display the last saved version. This parameter must be used in the test phase only.
  - **_debug** to display the trace of the data input or calculated in the pages of the form. This is used to obtain more information about errors, including once the form has been published.

  Warning:

  When the form is displayed via a URL with the **_uuid** parameter, the value of the **origin** parameter is forced to **Adobe Campaign**.

Adding parameters

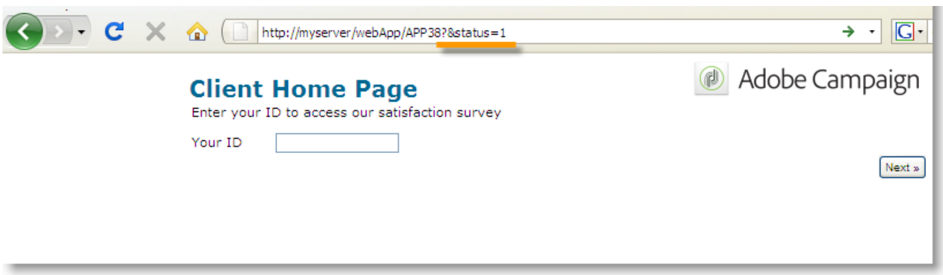
Parameters can be added via the **Parameters...** tab in the Properties window of the form. They can be made mandatory, as shown below:



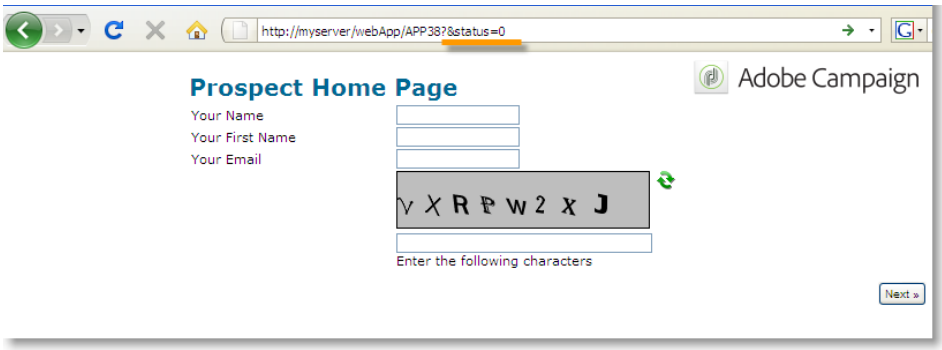
You must specify a storage location from which the value of the parameter will be retrieved. To do this, select one of the storage options and then click the **Storage** tab to select the field or the variable concerned. The storage options are detailed in Response storage fields [page 106].

The respondent status (0, 1 or any other value) may then be added to the URL for accessing the form. This information can be re-used in the pages of the form or in a test box. The pages displayed can be conditioned based on the value of the context, as shown below:

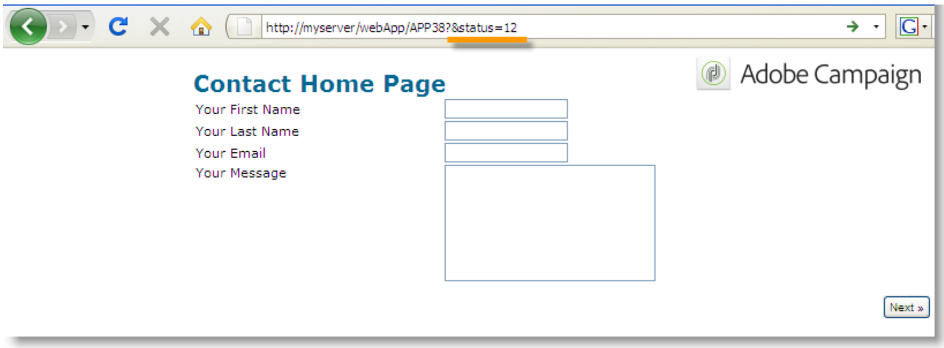
1 Home page for customers (**status=1**):



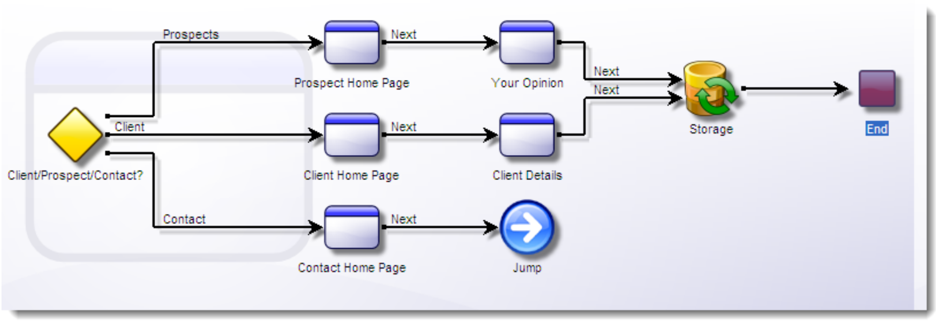
2 Home page for prospects (**status=0**):



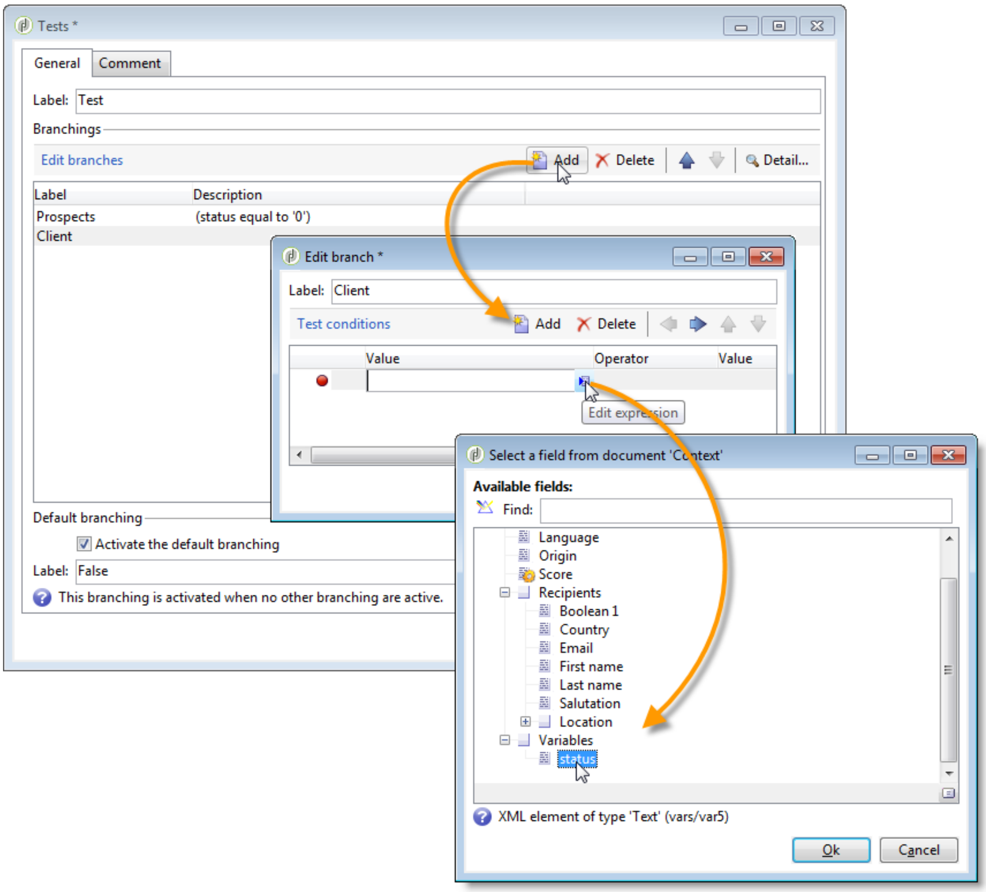
3 Home page for other profiles (e.g., **status=12**):



To configure this form, create a test box and place it at the start of the diagram, as shown below:



The test box lets you configure the page sequencing conditions:



Translating a form

It's possible to manage several languages for a single web application (Web forms, surveys, Microsites, etc.).

You can carry out translations directly in the Adobe Campaign console (refer to Managing translations using the integrated editor [page 133]), or export and import character strings to externalize translation (refer to Externalizing translation [page 135]).

The list of translation languages available by default is detailed in Changing the display language [page 139].

The web application is designed in an editing language: this is the reference language used to enter labels and other content to be translated.

The default language is the language which the web application will be displayed in if no language setting is added to its access URL.

Note:

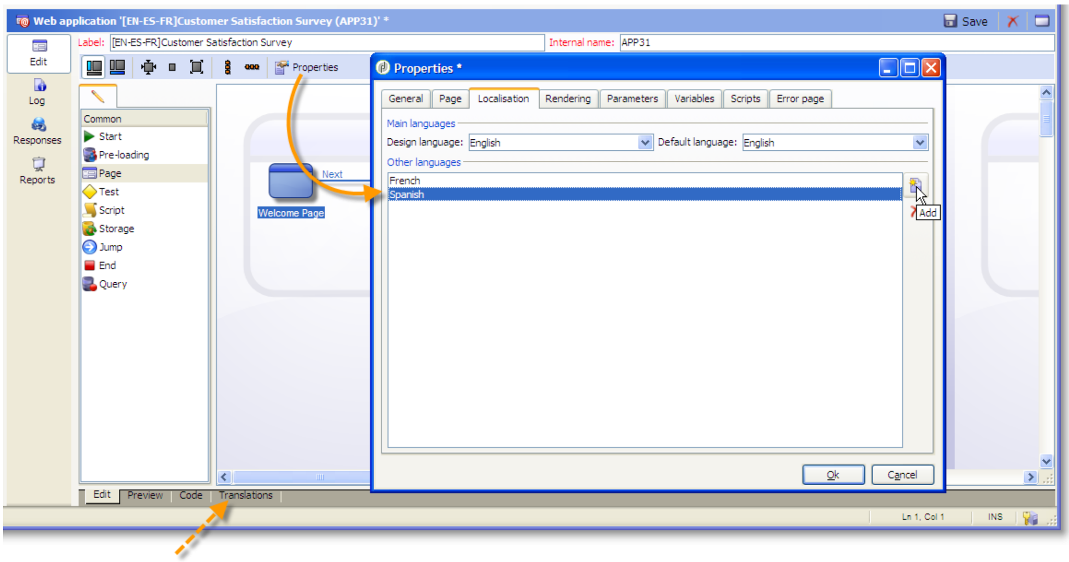
By default, the editing language and the default language are the same as the console language.

Choosing the translation languages

To define one or more translation languages, click the **Properties** button of the web application, then the **Localization** tab. Click the **Add** button to define a new translation language for the web application.

Note:

This window also lets you change the default language and the editing language.



When you add translation languages for a web application (or when the default language and the editing language are different), a **Translation** sub-tab is added to the **Edit** tab to manage translations.

Adobe Campaign includes a tool for translating and managing multi-lingual translations. This editor lets you view the strings to translate or approve, enter translations directly into the interface or import/export character strings to externalize translations.

Managing translations using the integrated editor

Collecting strings

The **Translations** tab lets you enter translations for the character strings that make up the web application.

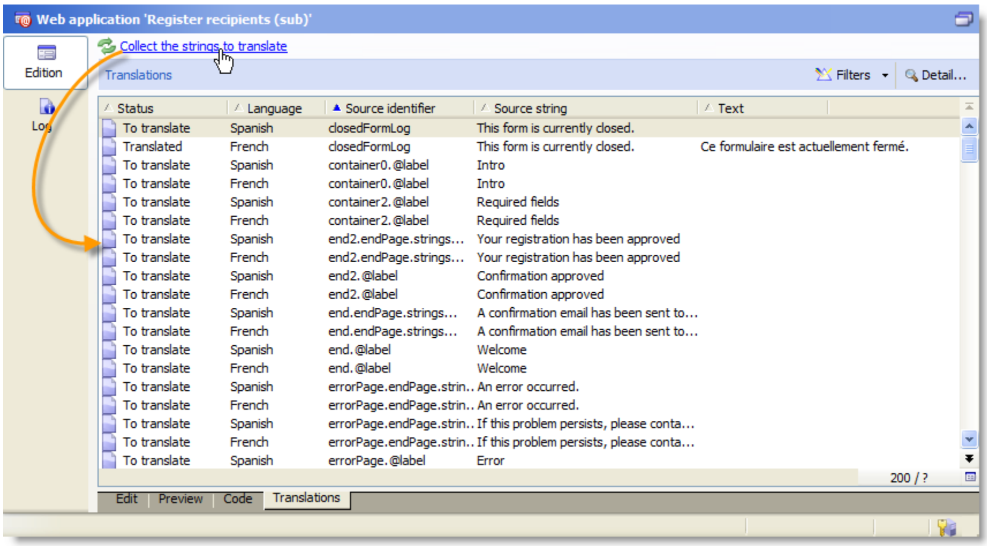
The first time you open this tab it won't contain any data: click the **Collect the strings to translate** link to update the strings in the web application.

The character strings collected can be the labels of fields or strings of the **Texts** tabs for static elements (HTML blocks, Javascript, etc.). Static elements are detailed in Adding static elements [page 71].

Warning:

This process can take several minutes depending on the volume of data to be processed.

If a warning appears to say that some translations are missing in the system dictionary, refer to Translating the system strings [page 141].

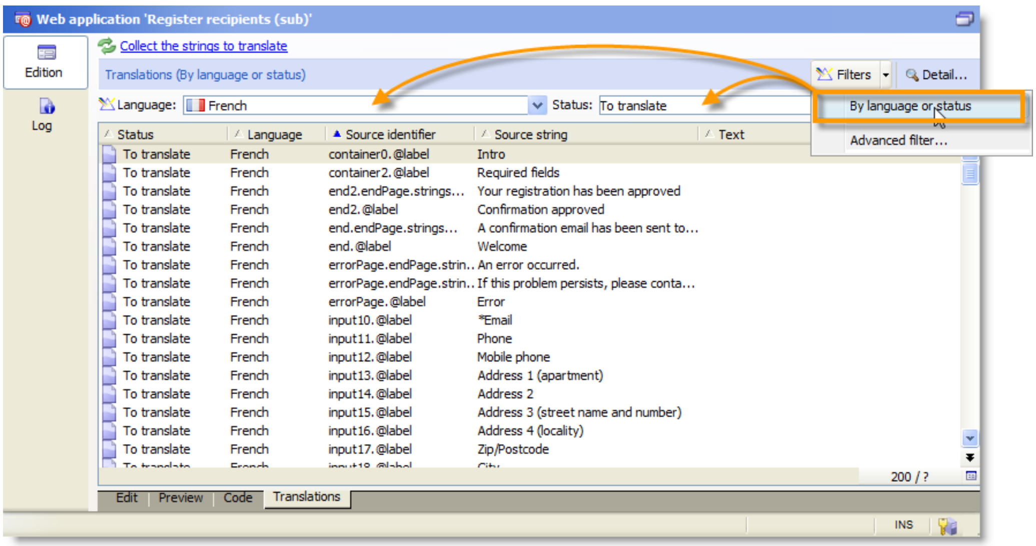


Each time a string is translated, its translation is added to the translation dictionary. When the collection process detects that a translation already exists, it will appear in the **Text** field of the string. The status of the string will be **Translated**.

For characters strings which have never been translated, the **Text** field is empty and the status is **To translate**.

Filtering strings

By default, each translation language of the web application is displayed. There are two default filters: language and status. Click the **Filters** button, then click **By language or status** to display the matching drop-down boxes. You can also create an advanced filter. For more on this, refer to the "Creating queries (advanced filtering)" section of the platform guide.

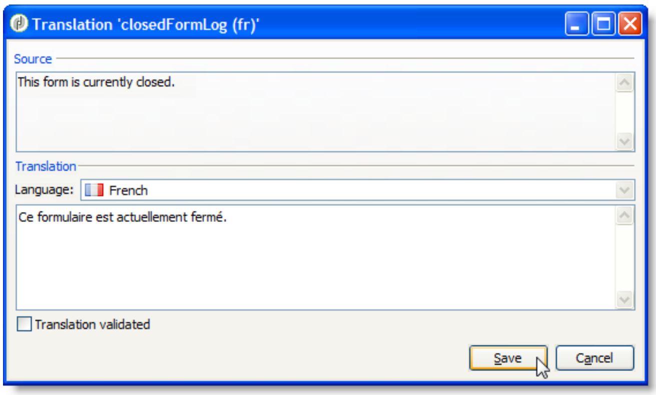


Go to the **Language** drop-down box to select the translation language.

To display only untranslated strings, select **To translate** in the **Status** drop-down box. You can also display only translated or approved strings.

Translating strings

1. To translate a word, double-click its line on the list of strings.



The source string is displayed in the upper section of the window.

2. Enter its translation in the lower section. To approve it, check the **Translation approved** option.

Note:

Translation approval is optional and will not block the process.

Non-approved translations are displayed as **Translated**. Approved translations are displayed as **Approved**.

Externalizing translation

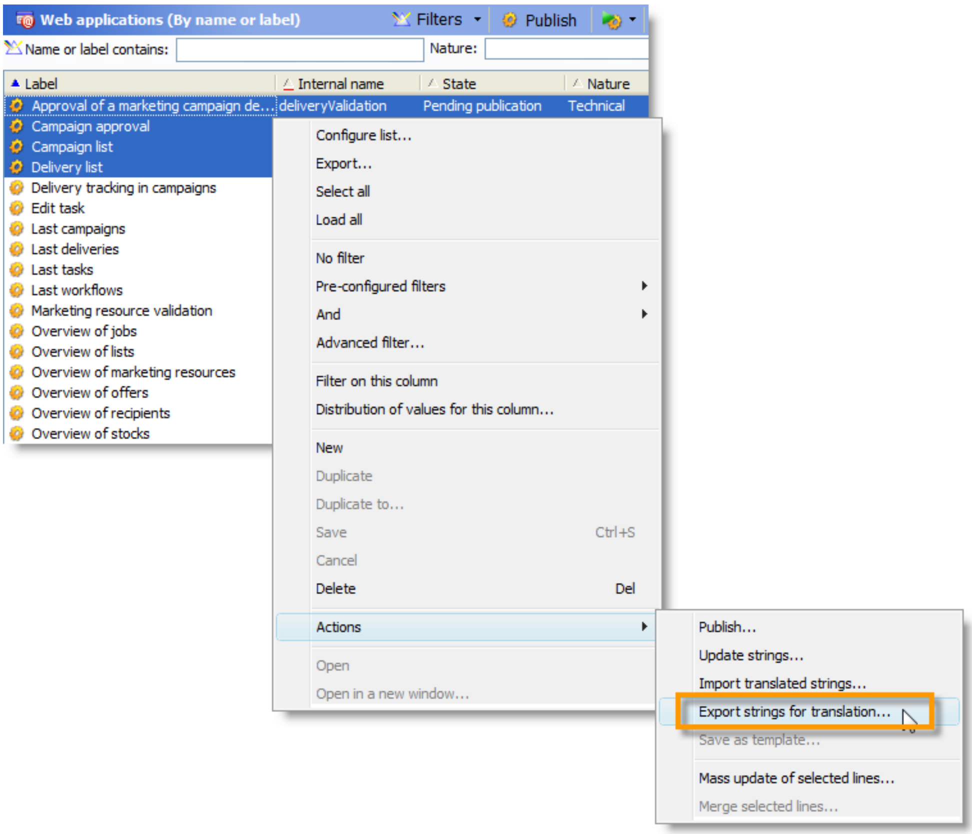
It's possible to export and import character strings to translate them using a tool other than Adobe Campaign.

Warning:

Once you have exported the strings, don't carry out any translations using the integrated tool. This would lead to a conflict when you re-import the translations and these will be lost.

Exporting files

1 Select the web application(s) whose strings you want to import, right-click, then select **Actions** > **Export strings for translation...**



2 Select an **Export strategy**:

- **One file per language**: the export will generate one file per translation language. Each file will be common to all selected web applications.
- **One file per web application**: the export will generate one file per selected web application. Each file will contain all translation languages.

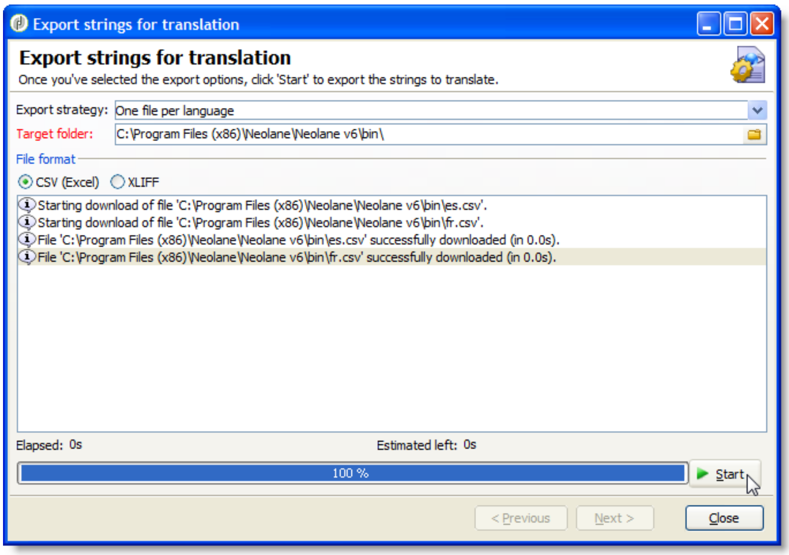
> **Note:**
>
> This type of export is not available for XLIFF exports.

- **One file per language and per web application**: the export will generate several files. Each file will contain one translation language per web application.
- **One file for all**: the export will generate a single multi-lingual file for all web applications. It will contain all translation languages for all selected web applications.

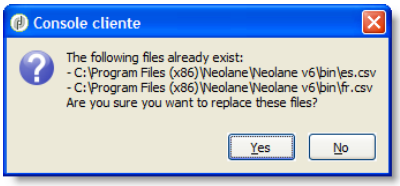
> **Note:**
>
> This type of export is not available for XLIFF exports.

3 Then chose the **Target folder** where files will be recorded.

4 Select the file format (**CSV** or **XLIFF**) and click **Start**.



The names of export files are generated automatically. If you carry out the same export several times, a message will warn you that the files already exist. To replace them, click **Yes**. To keep your old files, click **No**, alter the **Target folder**, then click **Start** again to run the export.



Note:

When you export files in **CSV format**, each language is linked to a status and approval status. The Approve? column lets you approve a translation. This column may contain the values **Yes** or **No**. As for the integrated editor (refer to Managing translations using the integrated editor [page 133]), approving translations is optional and does not block the process.

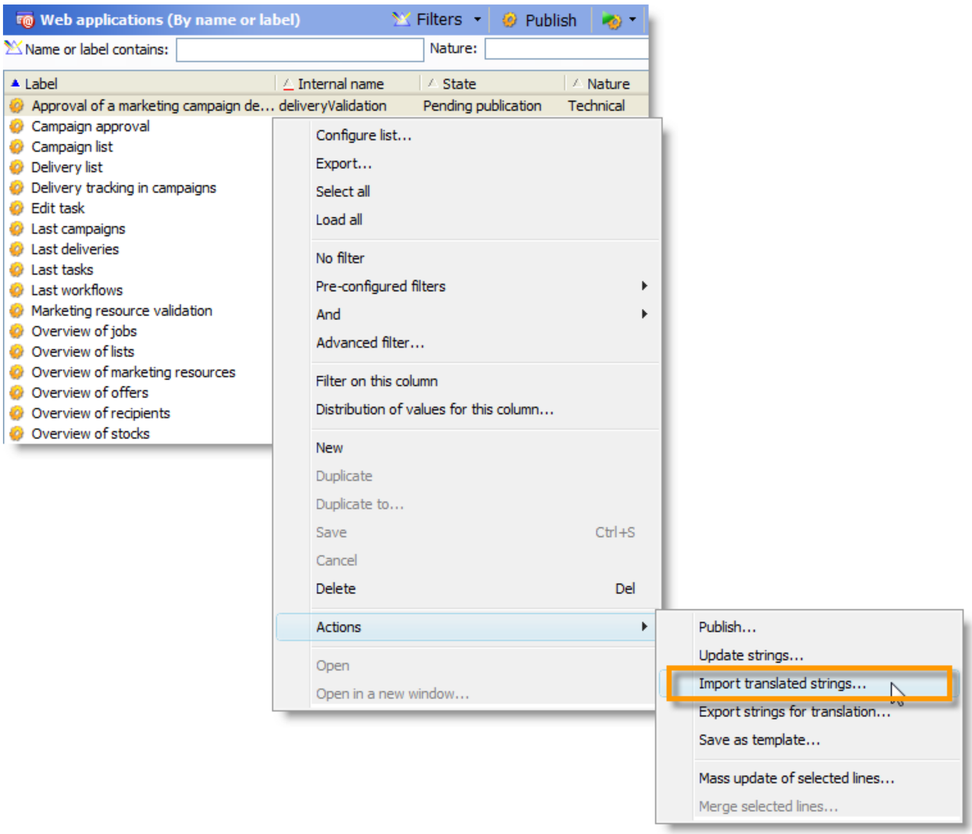
Importing files

Once external translation is completed, you can import the translated files.

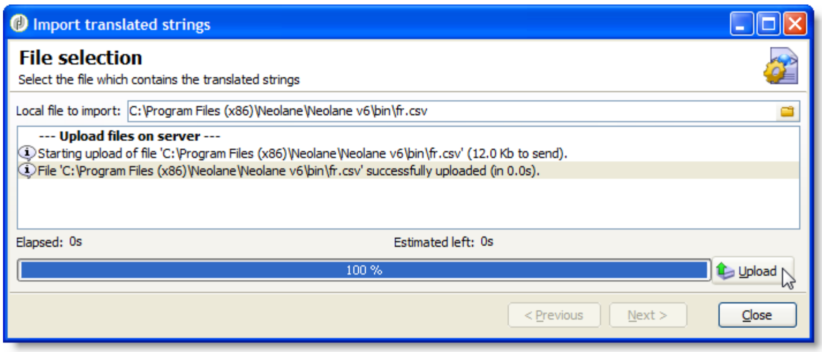
1 Go to the list of web applications, right-click, then select **Actions Import translated strings...**

Note:

There's no need to select the web applications concerned by the translation. Place the cursor anywhere on the list of web applications.



2 Select the file to import, then click **Upload**.



Note:

External translations always take priority over internal translations. In case of conflicts, the internal translation will be overwritten with the external translation.

Changing the display language

Web forms are displayed in the default language specified in the **Localization** tab of the web application properties. To change languages, you must add the following characters to the end of the URL (where *xx* is the symbol of the language):

- `?lang=xx`

  if the language is the first or only parameter of the URL. For example: **http://myserver/webApp/APP34?lang=en**
- `&lang=xx`

  if there are other parameters before the language in the URL. For example: **http://myserver/webApp/APP34?status=1&lang=en**

The translation languages available by default (and their symbols) are:

Language	Symbol	Default system dictionary	Calendar management
German	de	yes	yes
English	en	yes	yes
English (United States)	en_US		
English (United Kingdom)	en_GB		
Arabic	ar		
Chinese	zh		
Korean	ko		
Danish	da	yes	yes
Spanish	es	yes	yes
Estonian	et		
Finnish	fi		yes
French	fr	yes	yes
French (Belgium)	fr_BE		
French (France)	fr_FR		
Greek	el		yes
Hebrew	he		
Hungarian	hu		yes
Indonesian	id		
Irish	ga		
Italian	it	yes	yes
Italian (Italy)	it_IT		
Italian (Swiss)	it_CH		
Japanese	ja		
Latvian	lv		yes
Lithuanian	lt		
Maltese	mt		
Dutch	nl		yes
Dutch (Belgium)	nl_BE		
Dutch (Holland)	nl_NL		
Norwegian (Norway)	no_NO		yes
Polish	pl		yes
Portuguese	pt		yes
Portugese (Brazil)	pt_BR		
Portuguese (Portugal)	pt_PT		
Russian	ru		yes
Slovene	sl		

Slovak	sk		
Swedish	sv	yes	yes
Swedish (Finland)	sv_FI		
Swedish (Sweden)	sv_SE		
Czech	cs		
Thai	th		
Vietnamese	vi		
Waloon	wa		

Default system dictionary: some languages include a default dictionary which contains the translation of the system strings. For more on this, refer to Translating the system strings [page 141].

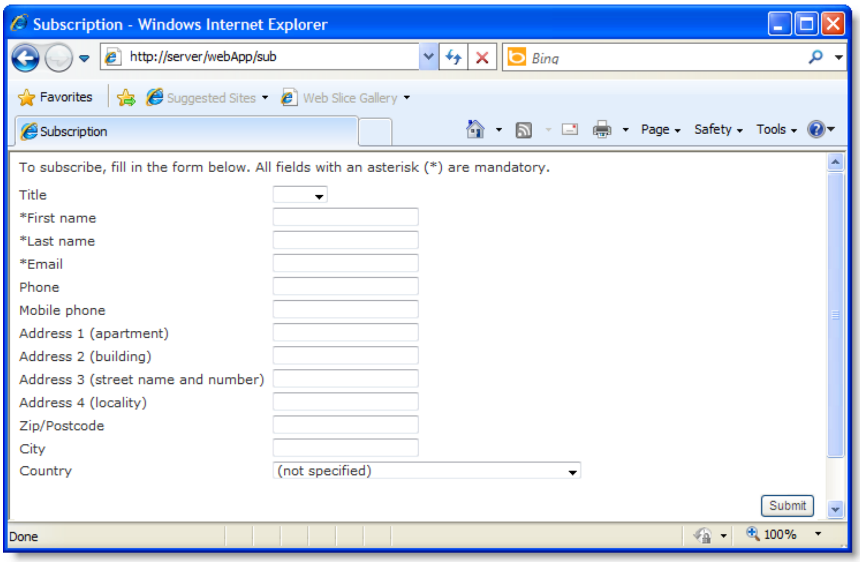
Calendar management: the pages of a web application can include a calendar for entering dates. By default, this calendar is available in several languages (translation of days, date format).

Note:

To add other languages than those offered by default, refer to Adding a translation language [page 143]

Example: displaying a web application in several languages

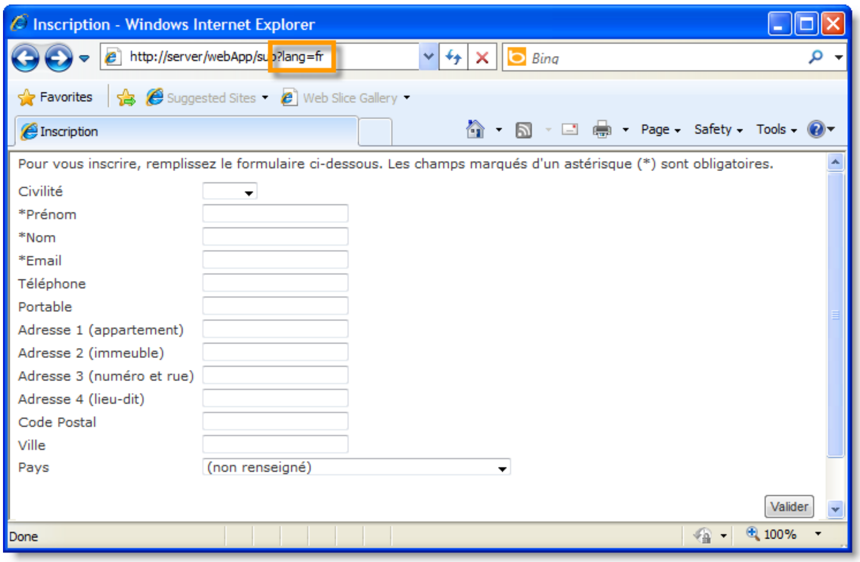
The following Web form is available in four languages: English, French, German and Spanish. The character strings have all been translated via the **Translation** tab of the Web form. Because the default language is English, when the survey is published, use the standard URL to display it in English.



Add **?lang=fr** to the end of the URL to display it in French:

Note:

The list of symbols for each language is detailed in Changing the display language [page 139].



You can add **?lang=es** or **?lang=de** to display it in Spanish or German.

Note:

If other parameters are already used for this web application, add **&lang=**.

For example: **http://myserver/webApp/APP34?status=1&lang=en**

Advanced configuration

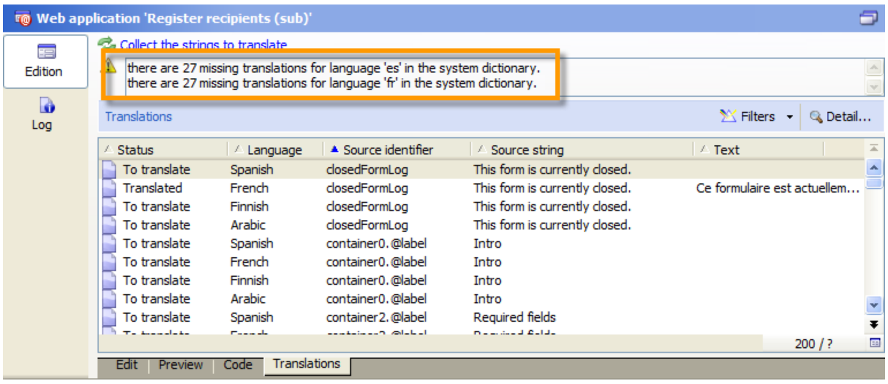
Warning:

This section is reserved for expert users.

Translating the system strings

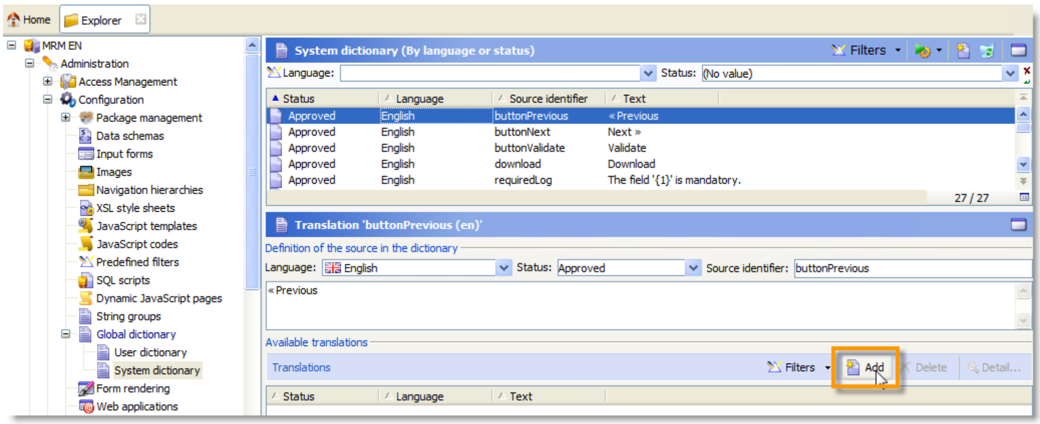
System strings are out-of-the-box character strings used by all web applications. For example: **Next**, **Previous**, **Approve** buttons, **Loading** messages, etc. By default, some languages contain a dictionary with translations for these strings. The list of languages is detailed in Changing the display language [page 139].

If you translate your web application into a language for which the system dictionary isn't translated, a warning message will appear to let you know that some translations are missing.

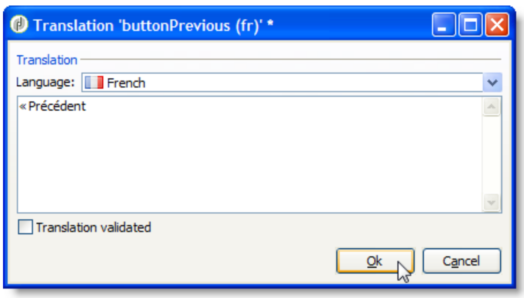


To add a language, apply the following steps:

1. Go to the Adobe Campaign tree and click **Administration/Configuration/Global dictionary/System dictionary**.
2. In the upper section of the window, select the system string to translate, then click **Add** in the lower section.



3. Select the translation language and enter a translation for the string. You can approve the translation by checking the **Translation validated** option.



Note:

Translation approval is optional and will not block the process.

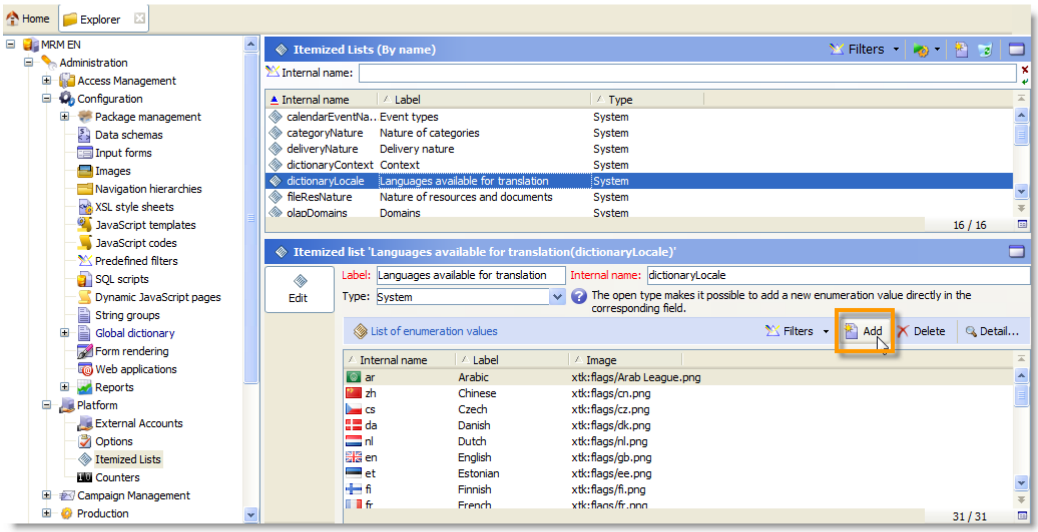
Warning:

Don't delete the out-of-the-box system strings.

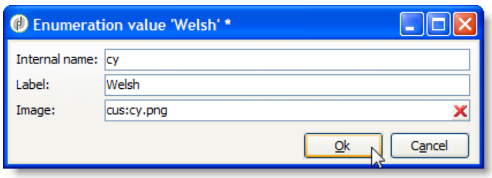
Adding a translation language

To translate web applications into languages other than the default ones (refer to Changing the display language [page 139]), you will need to add a new translation language.

1 Click the **Administration** > **Platform** > **Itemized lists** node of the Adobe Campaign tree and select **Languages available for translation** from the list. The list of available translations is displayed in the lower section of the window.



2 Click the **Add** button, then enter the **Internal name**, **Label** and identifier of the image (flag). To add a new image, please contact your administrator.



Use cases

Create a subscription with double opt-in

When you offer information services, recipients need to subscribe to receive all linked communications. To avoid improper communications and make sure the recipient subscribed intentionally, we recommend sending a subscription confirmation request to create a double opt-in. The subscription will only be effective once the user clicks the link included in the confirmation message.

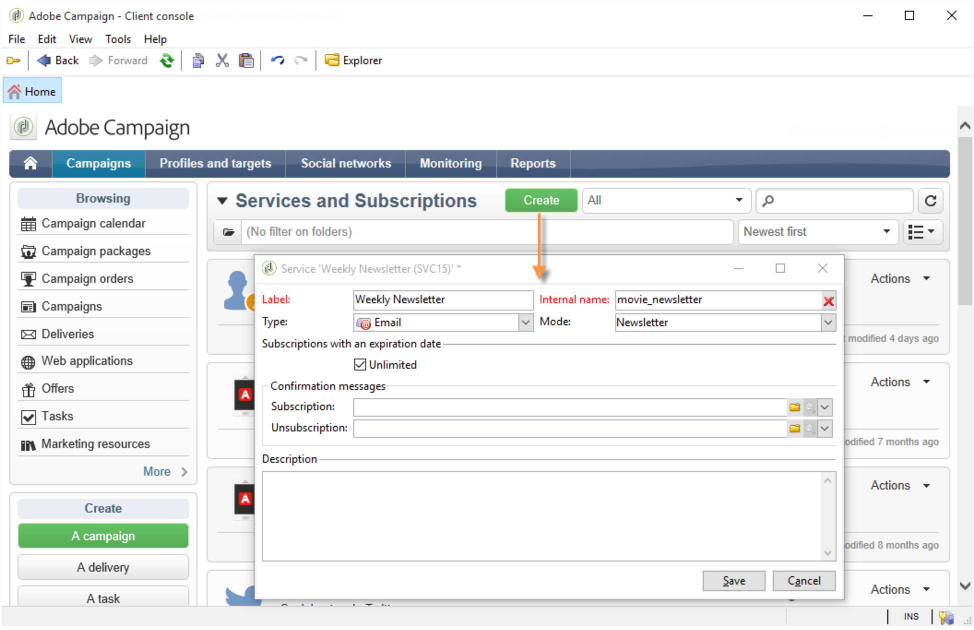
This example is based on the following scenario:

1 Creating a newsletter subscription form on a website that contains a checkbox for subscribing to a temporary service. This service will enable you to deliver subscription confirmation messages.

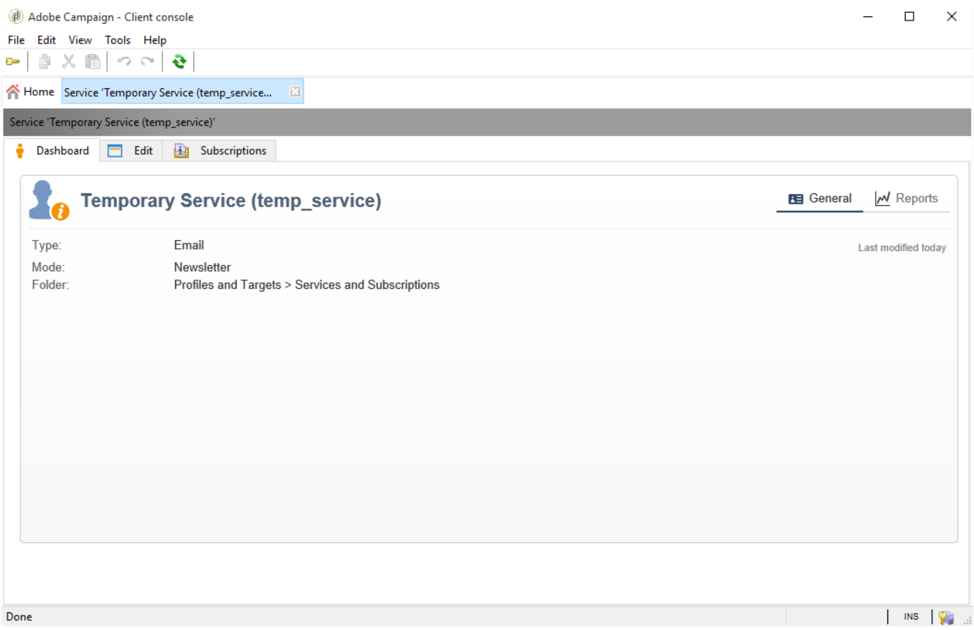
2 Creating the subscription confirmation delivery with a delivery template linked to the web form. It contains the confirmation link that calls up the form for newsletter subscription and displays a subscription approval message.

Step 1 - Creating information services

1 Create the newsletter subscription service to be offered to your recipients. For more information on how to create a newsletter, refer to the Subscriptions and referrals guide.



2 Create a second information service, a temporary service linked to a delivery template for sending subscription confirmation messages.



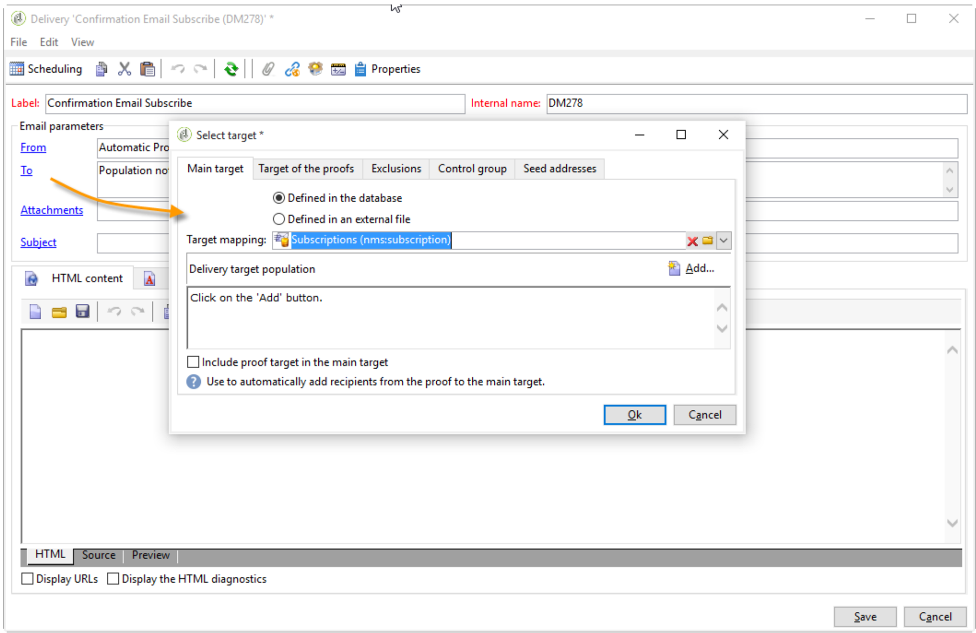
Step 2 - Creating confirmation messages

Confirmation messages are sent via a dedicated delivery template referenced at the temporary service level.

1 In the **Explorer**, select **Resources** > **Templates** > **Delivery templates**.

2 Create a delivery template for sending the subscription confirmation messages.

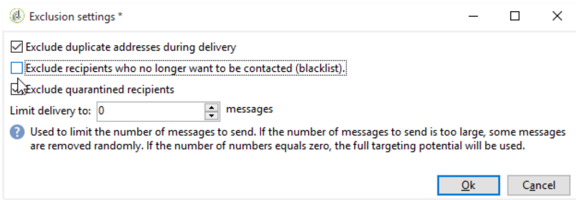
3 Click the **To** button in the **Email parameters** to associate the delivery template with the Subscriptions target mapping instead of Recipients.



4 Since the recipients of this delivery haven't confirmed their approval, they are still blacklisted in the database. For them to receive this communication, you need to authorize deliveries based on this template to target blacklisted recipients.

To do this, click the **Exclusions** tab.

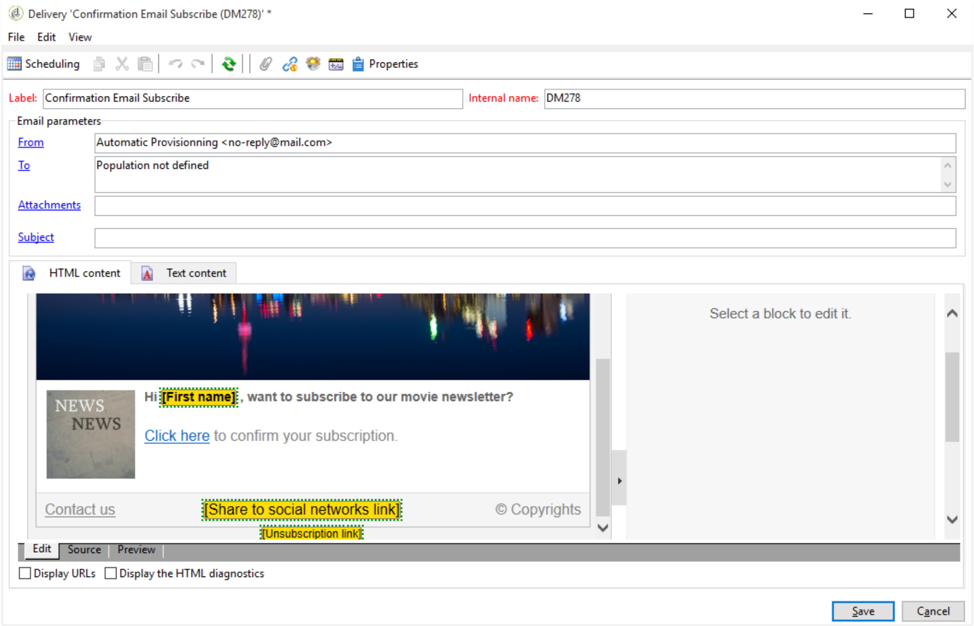
5 Click the **Edit...** link and uncheck the **Exclude recipients who no longer want to be contacted (blacklist)** option.



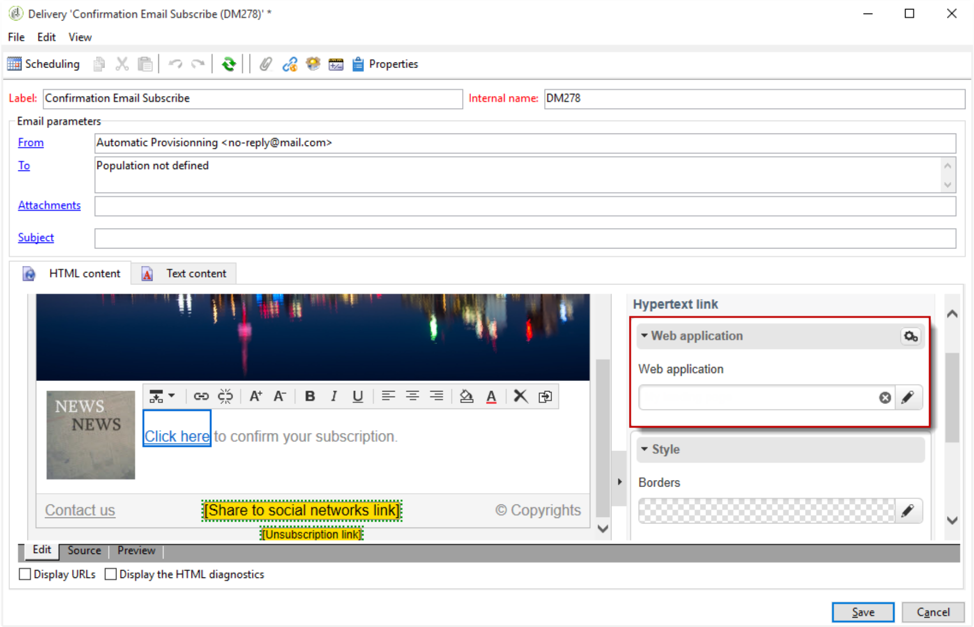
Warning:

This option may only be disabled in this type of context.

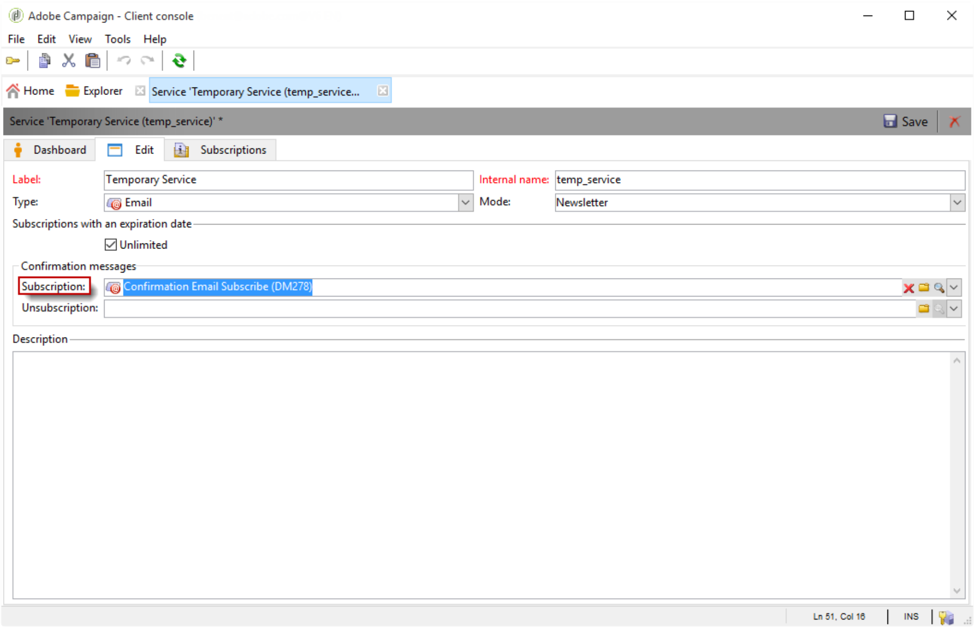
6 Personalize your delivery and insert the confirmation link into the message content. This link lets you access the Web form to record subscription confirmation.



7 With the DCE, link your URL to the Web form. Since the Web form is not yet created, replace the value as soon as you create it.



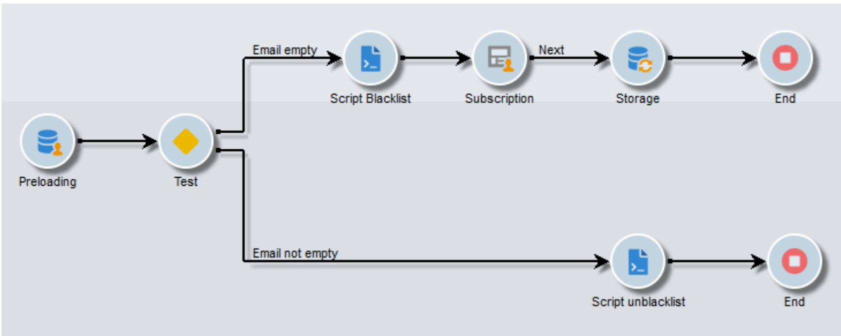
8 Finally, link this template to the temporary service previously created.



Step 3 - Creating the subscription form

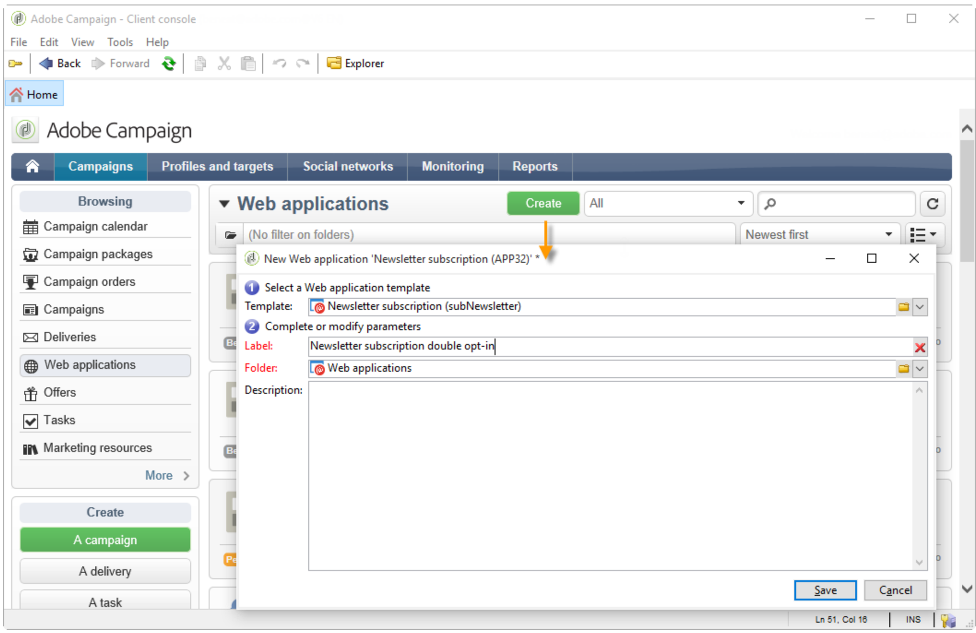
The Web form enables both recipient subscription and subscription confirmation.

The Web form workflow will include the following activities:



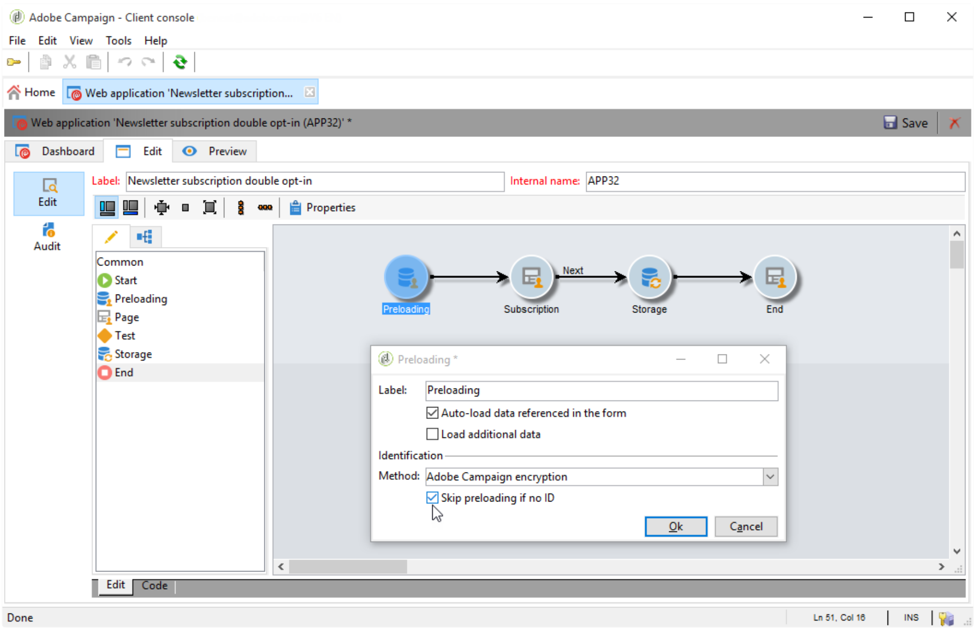
To do so:

1 Create a Web form and choose the template **Newsletter subscription (subNewsletter)**.



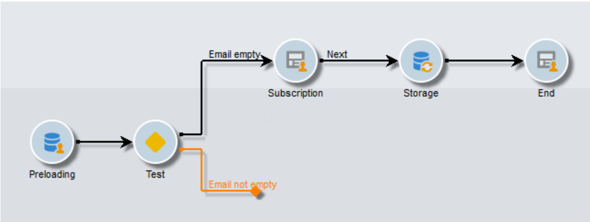
2 In the **Edit** tab, we need to configure the existing workflow since we want to add a confirmation message to the recipients who want to subscribe.

To do so, double-click the **Preloading** box and configure it as follows.

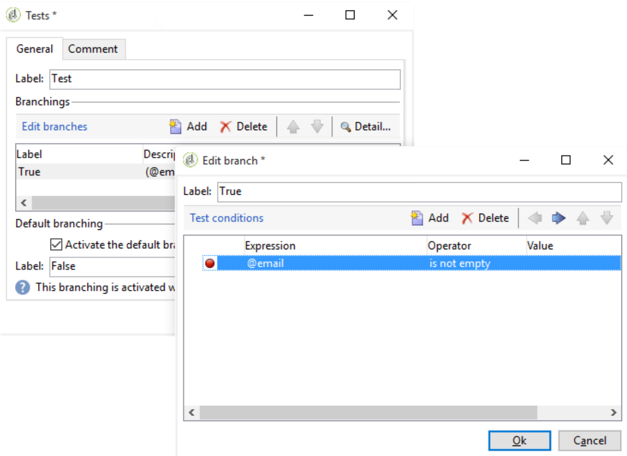


This means that if the user accesses this form via the link in the confirmation message, their profile information will be loaded. If they access the Web form via a page of the website, no information will be loaded.

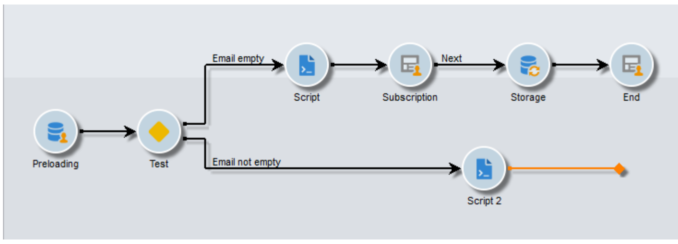
3 Add a **Test** activity to your workflow.



The **Test** activity can concern the recipient email. In this case, configure it as follows:

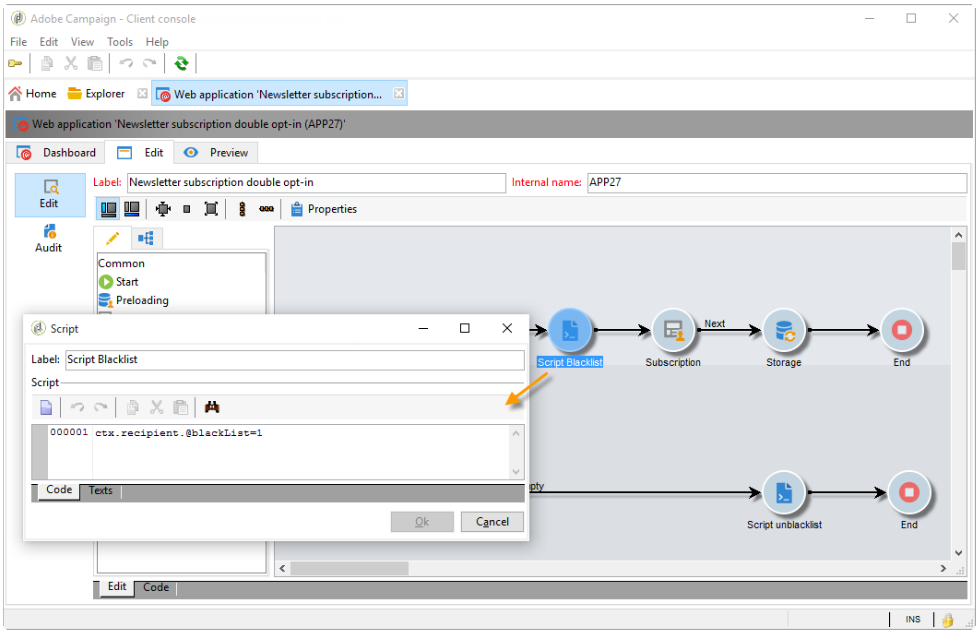


4 Add two **Script** activities to your workflow.



The first **Script** activity will blacklist recipients until they confirmed their subscription to the newsletter. Its content must be as follows:

```
ctx.recipient.@blackList=1
```

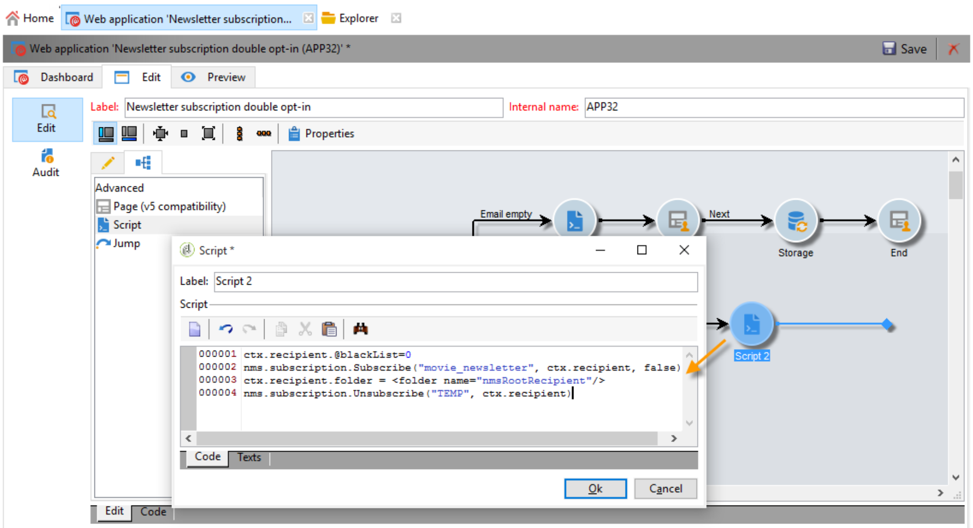


The second **Script** activity authorizes deliveries to be send to the users and subscribes them to the newsletter. The last two lines of the script will allow you to transfer your recipients from the temp folder to another folder and be reconciled with existing profiles as soon as they confirmed the subscription.

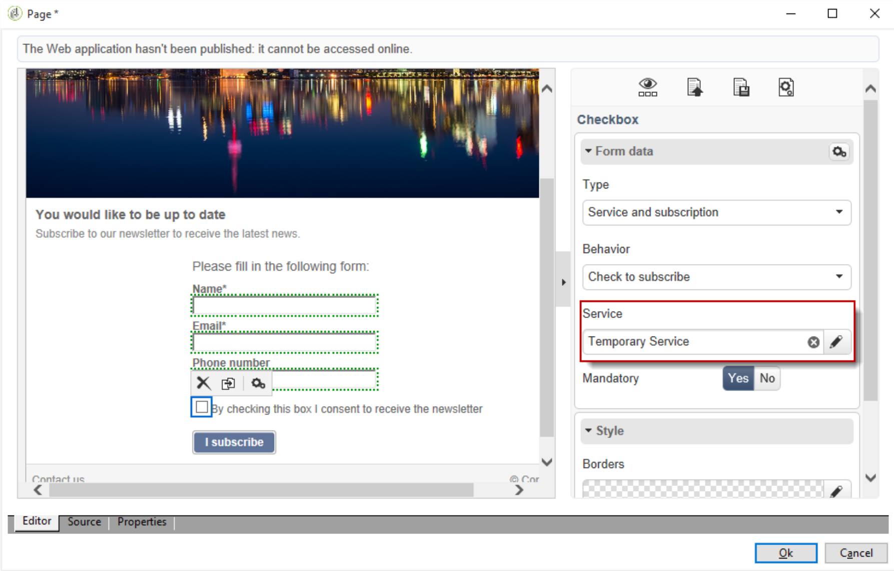
```
ctx.recipient.@blackList=0
nms.subscription.Subscribe("INTERNAL_NAME_OF_THE_NEWSLETTER", ctx.recipient, false)
ctx.recipient.folder = <folder name="nmsRootRecipient"/>
nms.subscription.Unsubscribe("TEMP", ctx.recipient)
```

Note:

The **Temp** partition can also be purged on a regular basis using a workflow.

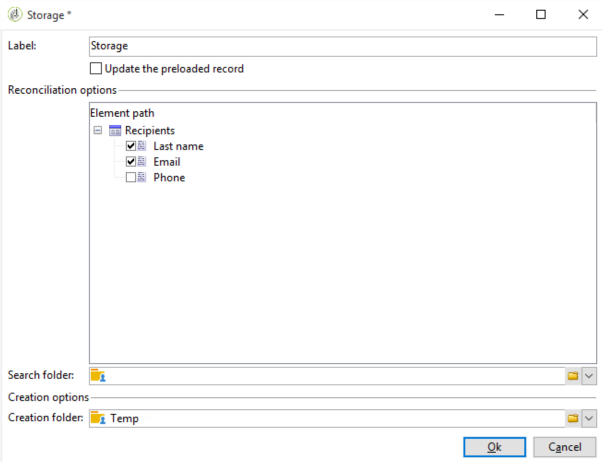


5 Double-click the **Subscription** activity to personalize the subscription form and link a checkbox with the temporary service previously created.



6 Configure the **Storage** activity to save the information entered in the form page.

This activity lets you create recipient profiles in a dedicated temporary to set them apart from the profiles in the database, whom communications can be sent to.

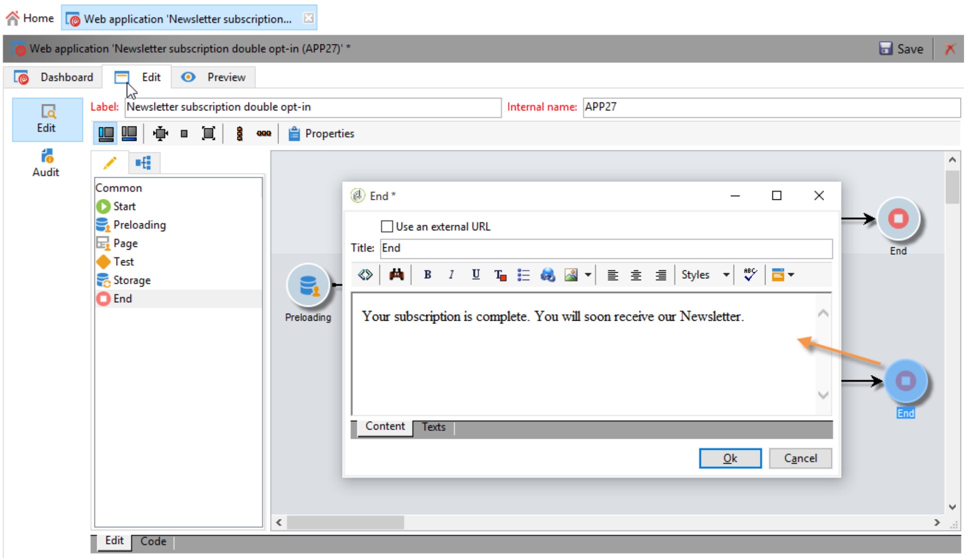


Note:

You must not define any reconciliation options.

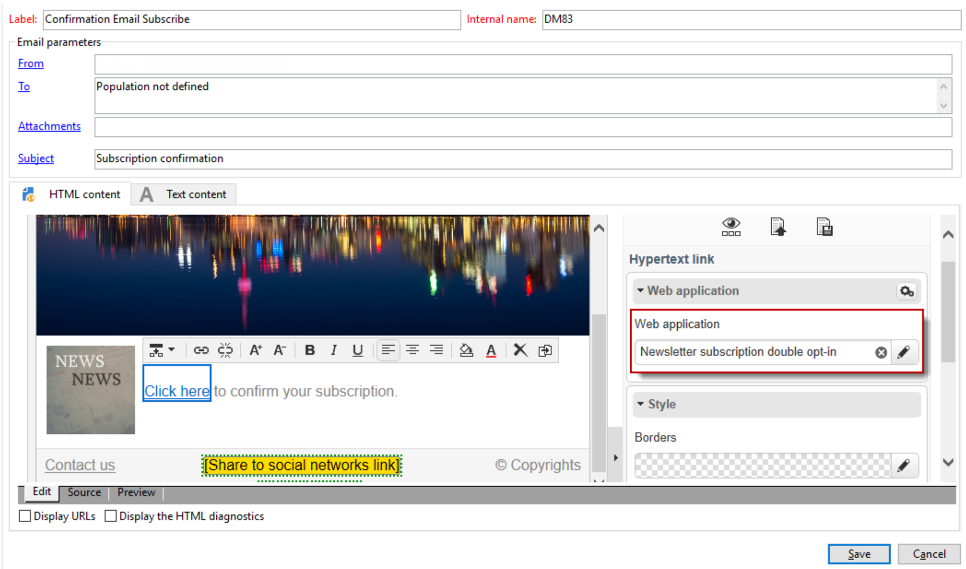
7 Add two **End** activities to display a message for the user.

The second **End** box will display the confirmation message once the subscription is complete.



Note:

Once the Web form is created and configured, you can now reference it in the delivery template to send confirmation messages.

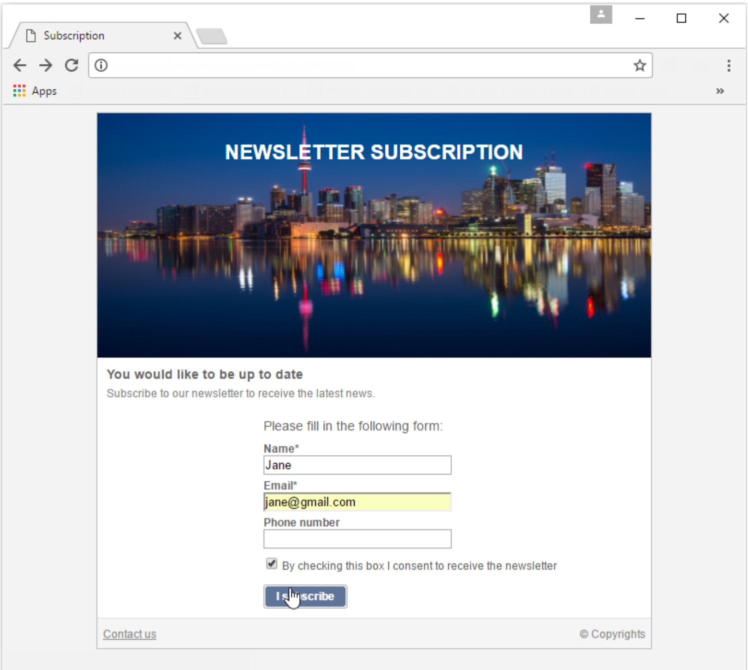


Step 4 - Publishing and testing the form

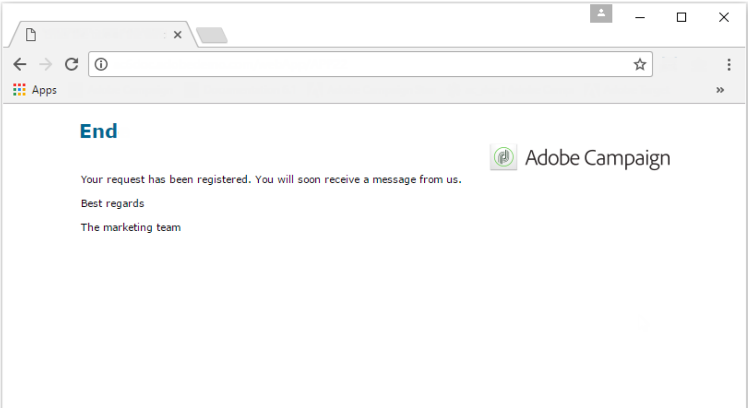
You can now publish the form to make it accessible to users.

Subscription to the newsletter involves the following steps:

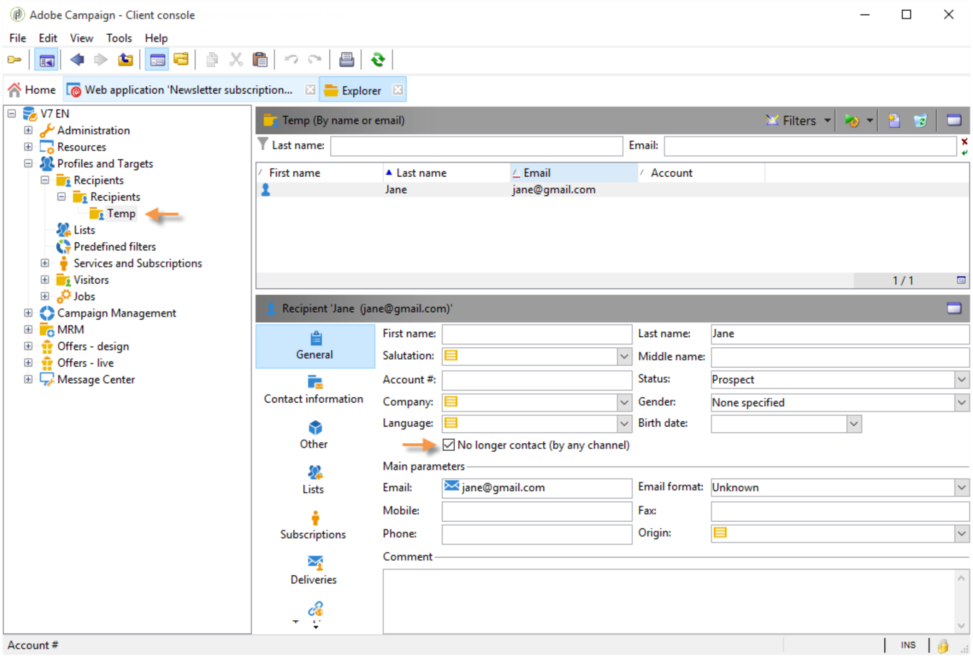
1. The user of the website logs on to the subscription page and approves the form.



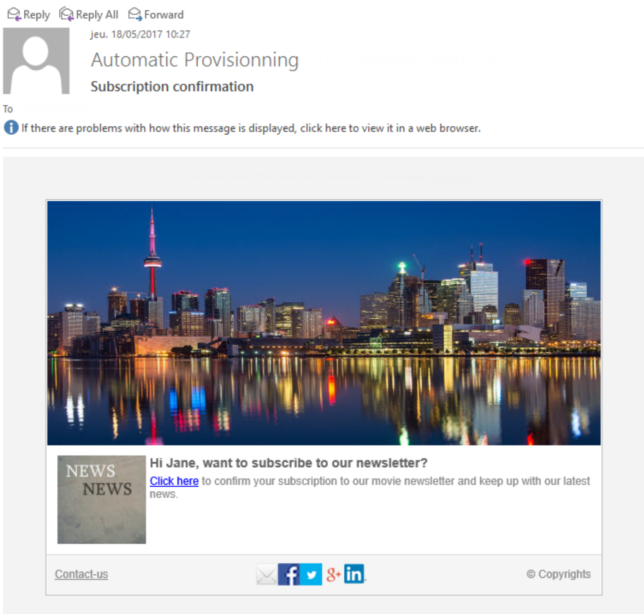
They are notified via a message in their browser that their request has been taken into account.



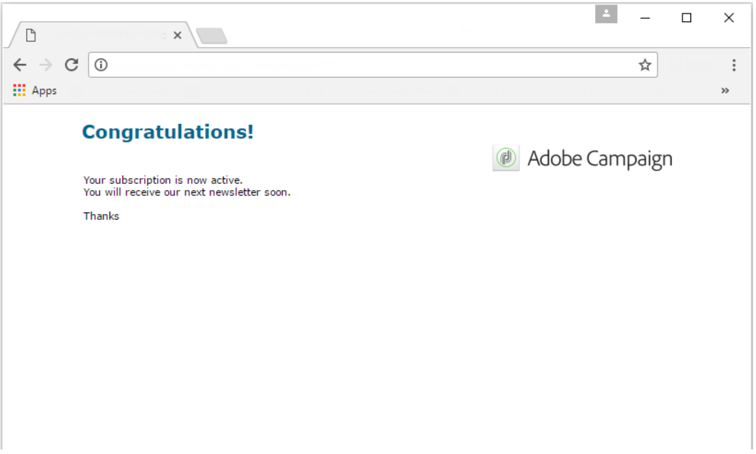
The user is added to the Adobe Campaign database in the **Temp** folder, and their profile is blacklisted until they confirm their subscription with the email.



2 A confirmation message including a link for approving their subscription is sent to them.



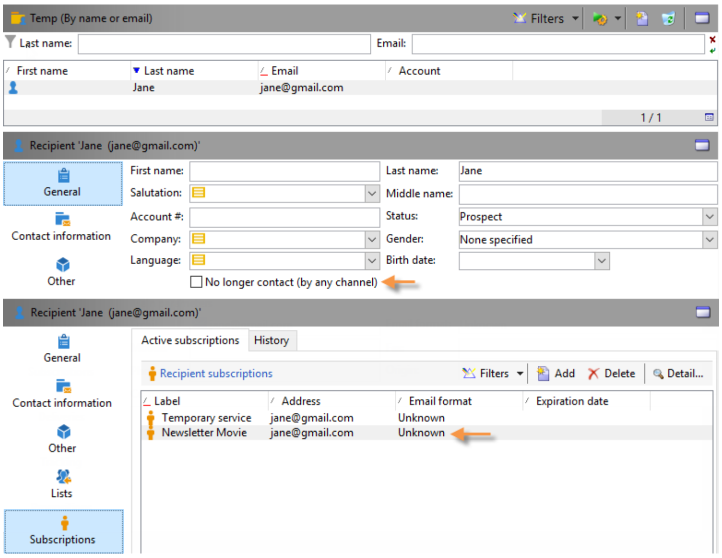
3 When they click this link, the approval page is displayed in their browser.



In Adobe Campaign, the user profile is updated:

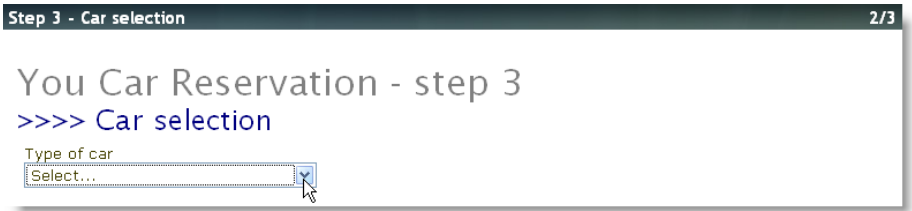
- they are no longer blacklisted,

- they are subscribed to the information service.

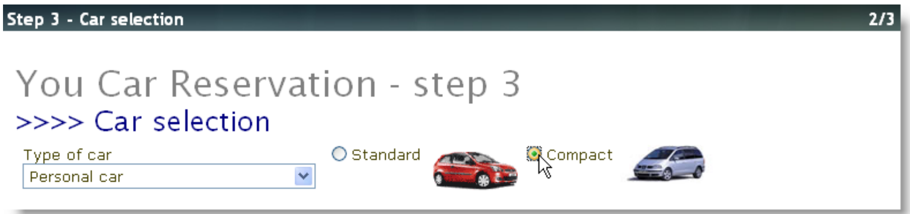


Display different options depending on the selected values

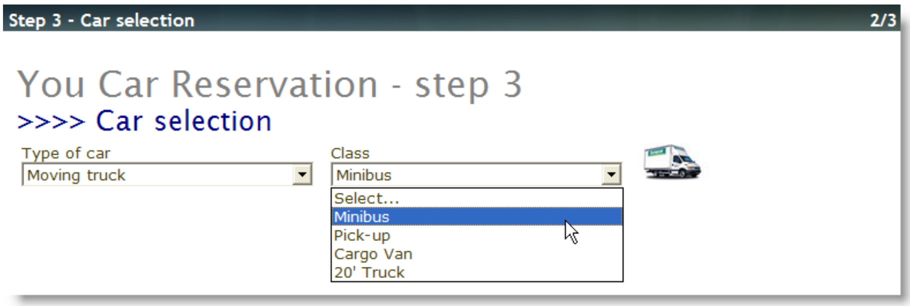
In the following example, the user is asked to select a type of vehicle. You can display the available vehicle categories according to the type selected. This means that the items displayed in the right-hand column depend on the user's selection:



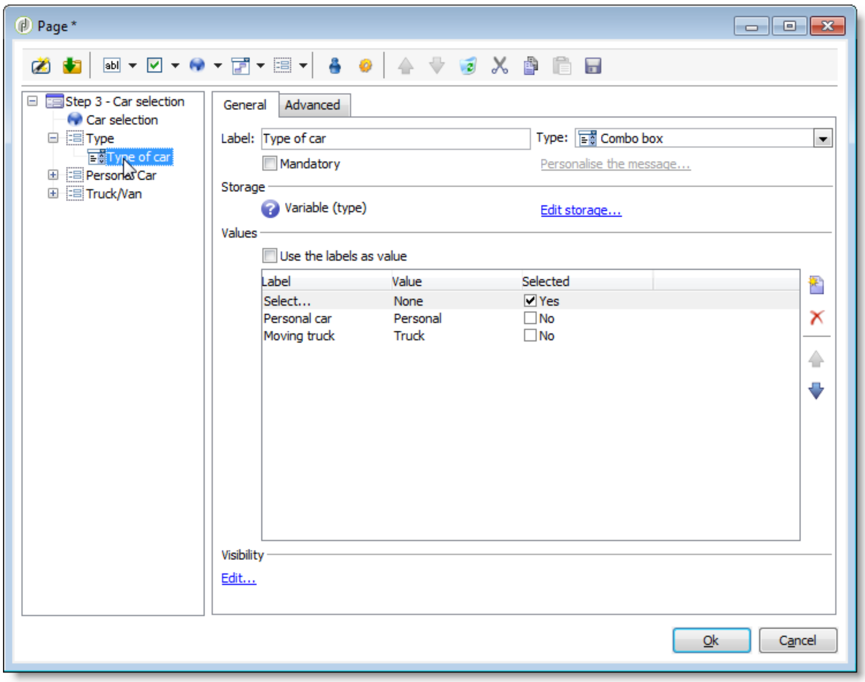
- When the user selects 'private vehicle', the choice between "Compact" and "Minivan" is offered.



- When the user selects 'commercial vehicle', a selection is displayed in a drop-down list:

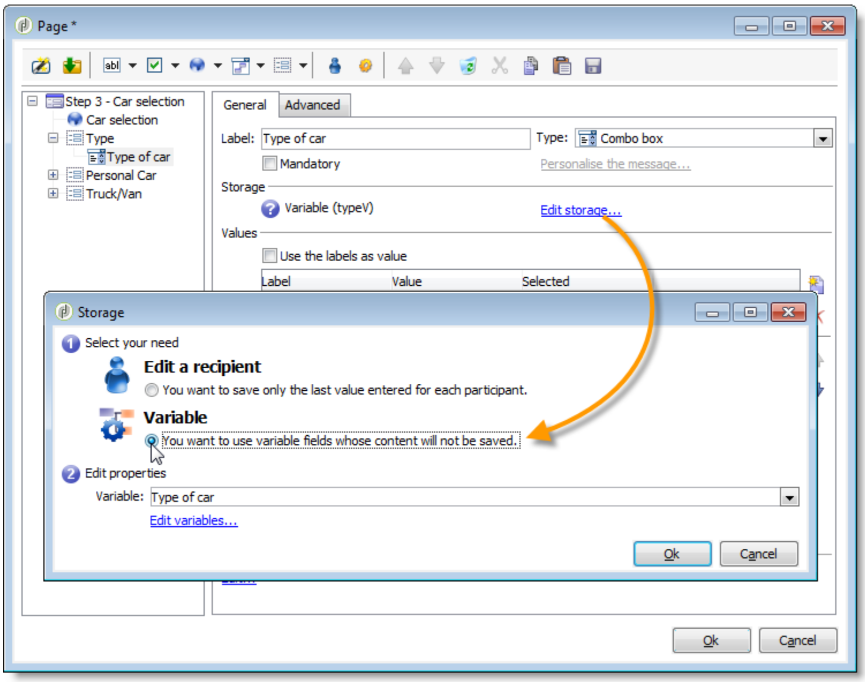


In this example, the vehicle type is not stored in the database. The drop-down list is configured as follows:

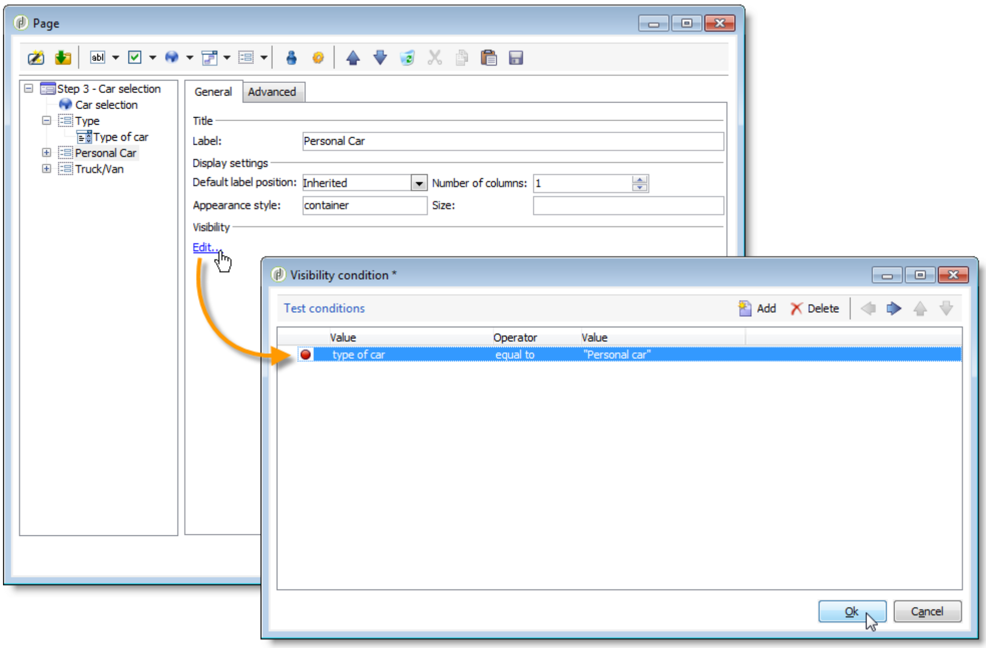


This information is stored in a local variable.

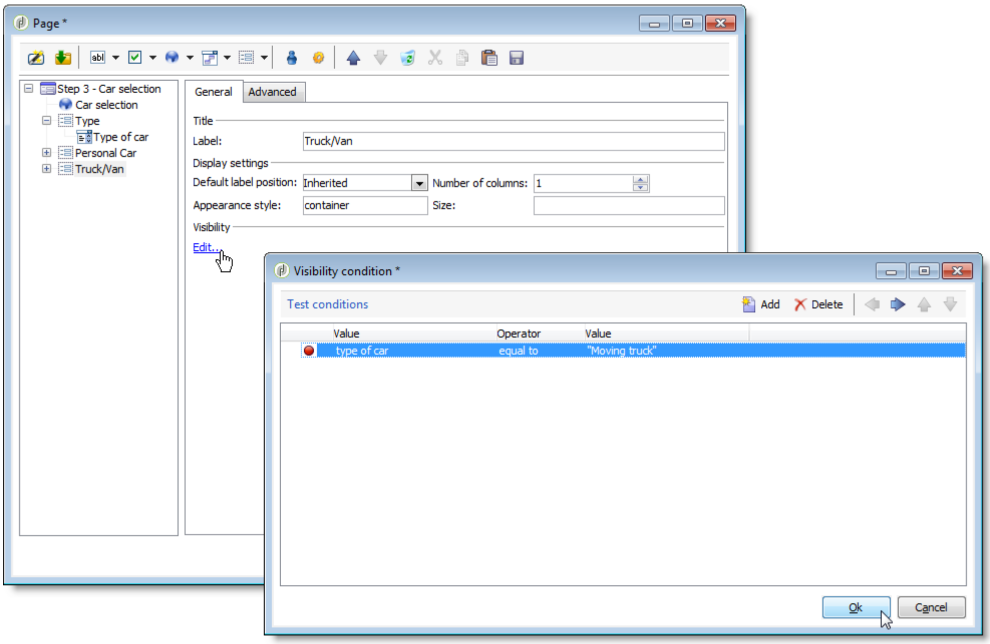
The right-hand column's conditional display is configured in the containers:



- Conditional visibility of fields for a private vehicle:



- Conditional visibility of fields for a commercial vehicle:



Adobe Campaign

CHAPTER 4

Web Applications

Table of Contents

Overview

Introduction

Adobe Campaign includes a graphical module to define and publish Web applications. This is used to create pages, such as an edit form on an extranet, or notification forms including data from the database with tables, charts, input forms, etc. This functionality lets you design and post web pages where users can look up or enter information.

This chapter provides an overview of how to manage Web applications.

Main functionalities

The web applications in Adobe Campaign give access to the following functionality:

- Multiple-page form creation,
- Multilingual survey management with an integrated translation tool,
- Graphical page management interface, multiple-column page layout,
- Rendering personalization and field position,

- Conditional display of survey fields according to answers,
- Random display of questions,
- Conditional page display,
- Information check before validation depending on the expected data type (number, e-mail address, date, etc.) and the mandatory fields,
- E-mail invitations or notification,
- Personalization of error and end messages,
- Use of images, videos, hypertext links, captcha, etc.
- Monitoring of responses in real time.

The optional survey creation module (**Survey**) offers the following additional functionalities:

- Dynamic extension of the database: creation of responses not included in the initial data template,
- Generating dedicated reports.

Compared to Web applications, surveys have a simplified graphical interface with a reduced number of editing controls.

Note:

Surveys are detailed in Online surveys.

The overall functionalities of Web forms in Adobe Campaign are detailed in Web forms.

Implementation steps

To create and post a web application, you must:

1. Create the content (fields, lists, tables, graphs, etc.).

   You can also view the section which details the available fields for forms: all these fields are also available for Web applications. This information is available in Adding fields [page 51].
2. As required, you can add preloading, test, and saving steps, and configure the access control system (mainly within the framework of an extranet publication).
3. Publishing the web application to make it available on an extranet or in Adobe Campaign.

Configuration

Web application are created via the **Web Applications** link in the **Campaigns** and **Profiles and targets** universes.

Web applications are stored in the **Resources** > **Online** > **Web Applications** node of the Adobe Campaign tree. Configurations are broken down in the following folders:

- **Administration** > **Configuration** > **Form renderings**: contains the rendering templates for the web form presentation (applications and surveys). The template enables you to generate the form. It also uses a CSS style sheet. This style sheet can be overloaded at the template level. For more on this, refer to Selecting the form rendering template [page 88].
- **Resources** > **Templates** > **Web application templates**: contains form templates. To create a form or a web application, you must start from a template.

  Note:

  You can convert an existing Web application into a template. To do this, select the form and right-click. Select **Actions** > **Save as template...**.

General operation

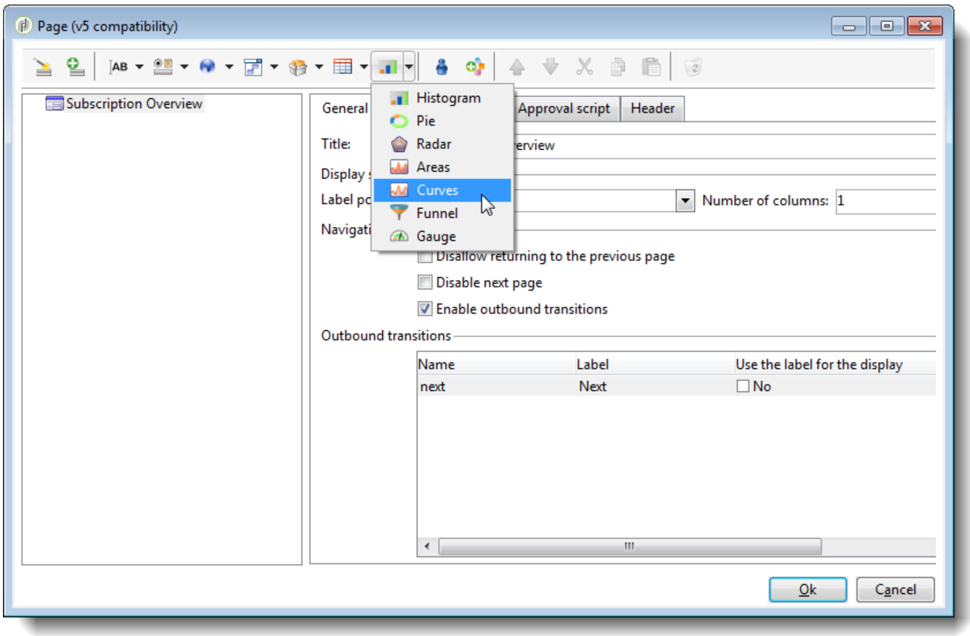
Web applications are created and managed according to the same principle as online surveys (refer to Overview [page 187]).

However, the functional differences are as follows:

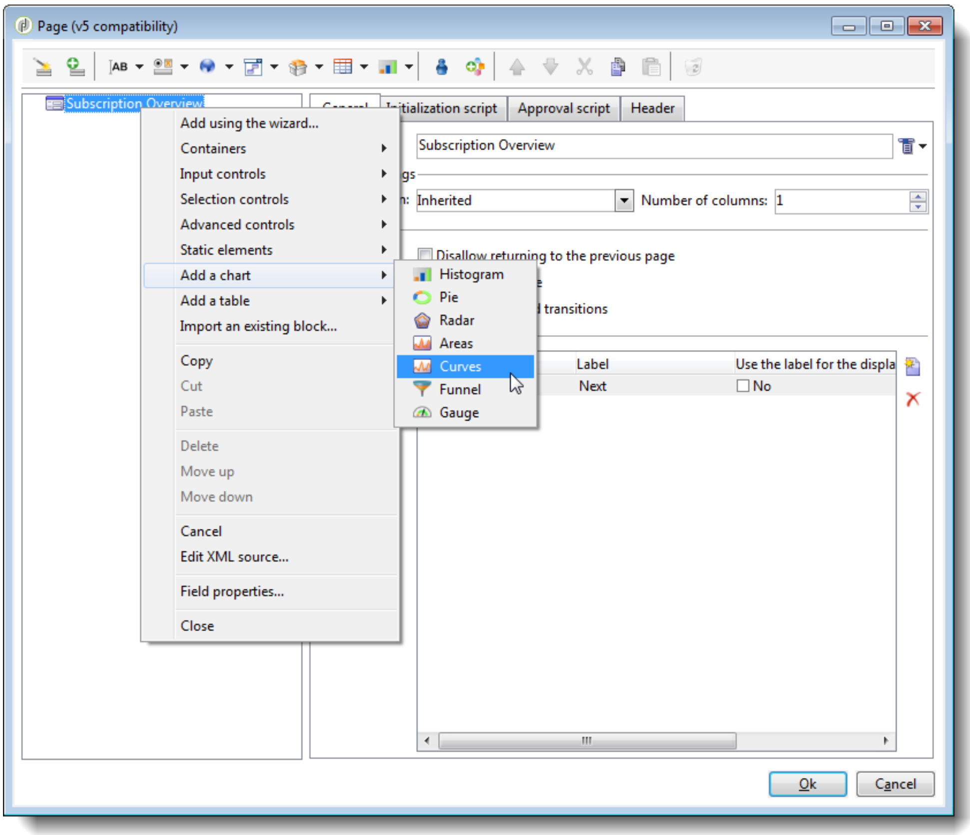
- Web applications use no archived fields. Data can therefore be stored in database fields or local variables only.
- There are no factory reports on Web applications.

- Additional fields are offered, mainly for creating tables and charts:
  - Charts

    You can include charts in Web applications. To do this, use the drop-down list of charts in the task bar to select the type of chart to be inserted.

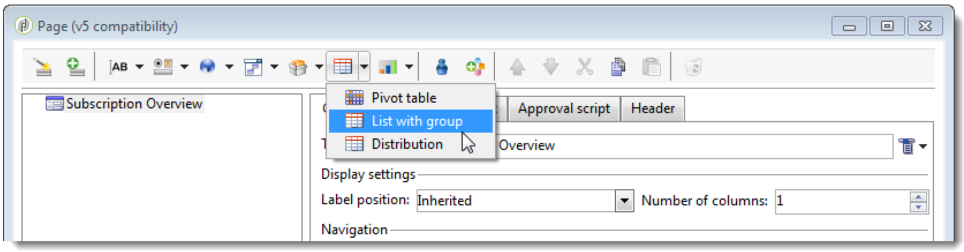


You can also select the **Add a chart** menu.

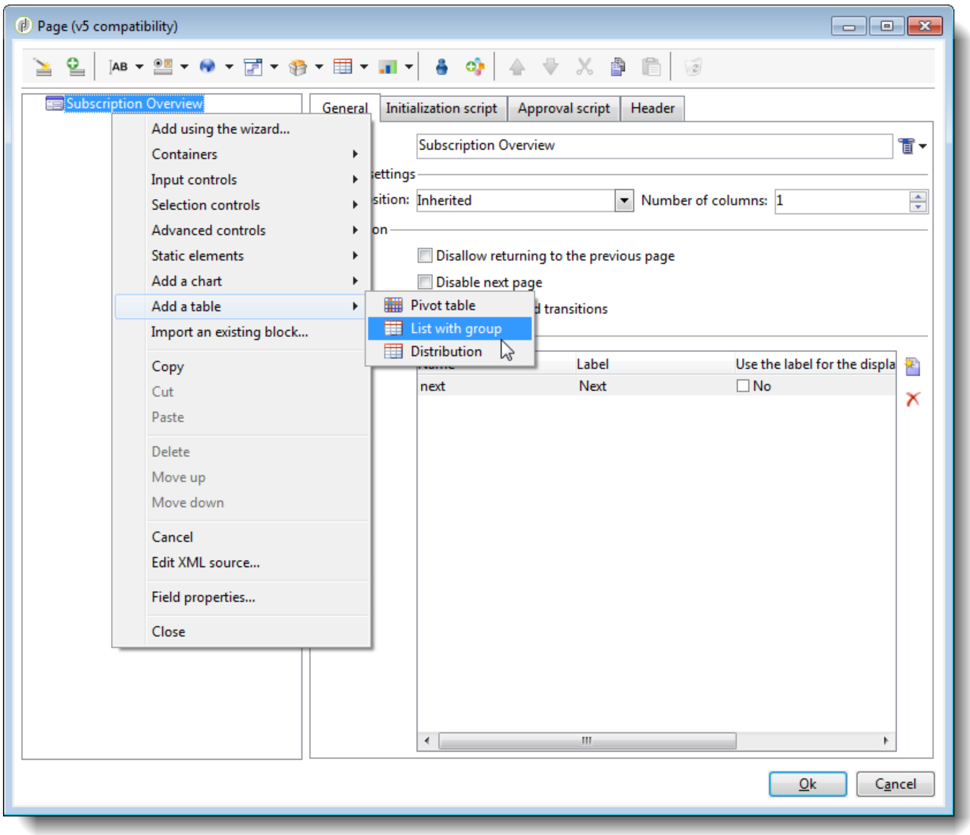


- Tables

  To add a table, use the drop-down list of tables in the task bar to select the type of table to be used.



You can also select the type of table in the drop-down menu.



⚠ Warning:

It is highly recommended that the configurations applied be continually checked in order to detect any errors early in the web application construction process. To check the rendering of a modification, save the application, then click the **Preview** sub-tab.

Until the web application is published, the changes cannot be seen by the end user.

Overview-type web applications

The Adobe Campaign interface uses many web applications to access, manage, and interact with recipients, deliveries, campaigns, stocks, etc.

They are seen in the interface in the form of dashboards with only one page.

The out-of-the-box web applications are stored in the **Administration** > **Configuration** > **Web applications** node.

Edit forms

Edit form Web applications for an extranet are characterized by:

- A preloading box

  In most cases, the data to be displayed must be preloaded. Because the users who access these forms are identified (via an access control), preloading is not necessarily encrypted.
- A save box
- Adding pages

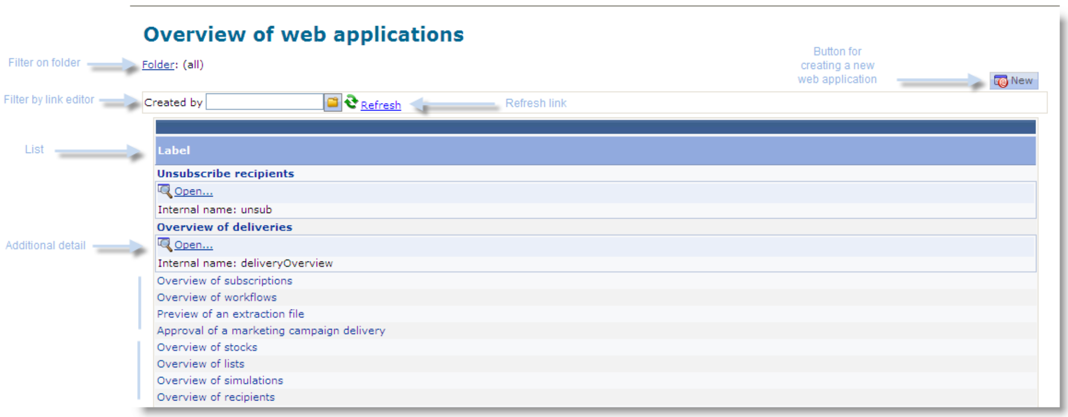
  Whereas "Overview"-type web applications all have a single page, edit forms can offer a sequence of pages based on specific criteria (tests, selections, profile of connected operator, etc.).

The operation of this type of web application is similar to **Surveys**, but without history management or field archiving. Users usually access it via a login page where they must identify themselves.

Creating an overview

In the following example, we will create an overview-type Web application to display all the Web applications in your database. Configure the following elements:

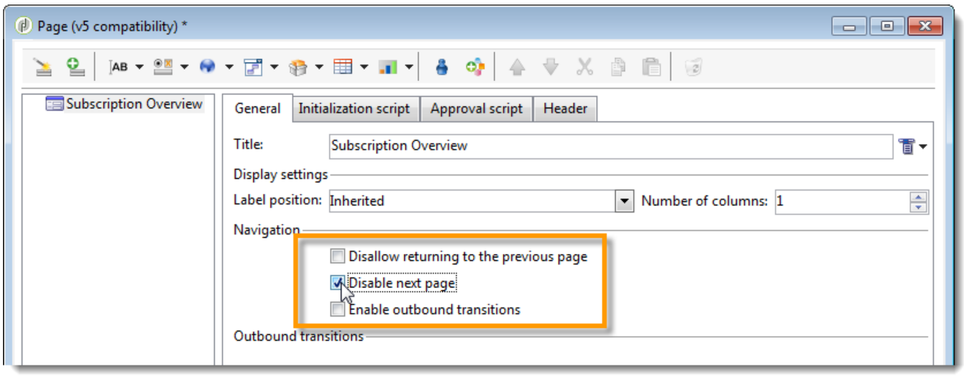
- a filter on the folder (refer to Creating a filter on a folder [page 168]),
- a button for creating a new Web application (refer to Creating a button to configure a new Web application [page 170]),
- detail display for each entry in the list (refer to Adding a detail [page 170]),
- one filter per link editing tool (refer to Creating a filter using a link editor [page 173]),
- a refresh link (refer to Creating a refresh link [page 174]).



For further information on web applications, refer to Overview [page 187].

Creating a single-page Web application

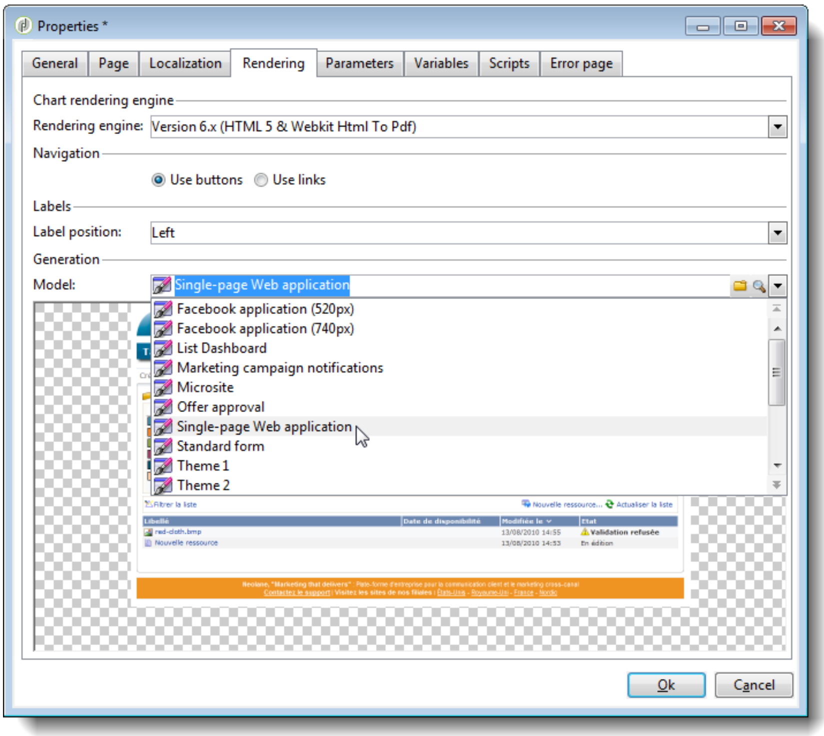
1. Create a single **Page** Web application and disable outbound transitions and transitions to the next page.



2. Changing the page title.

   This title will appear in the overview header and in the web application overview.

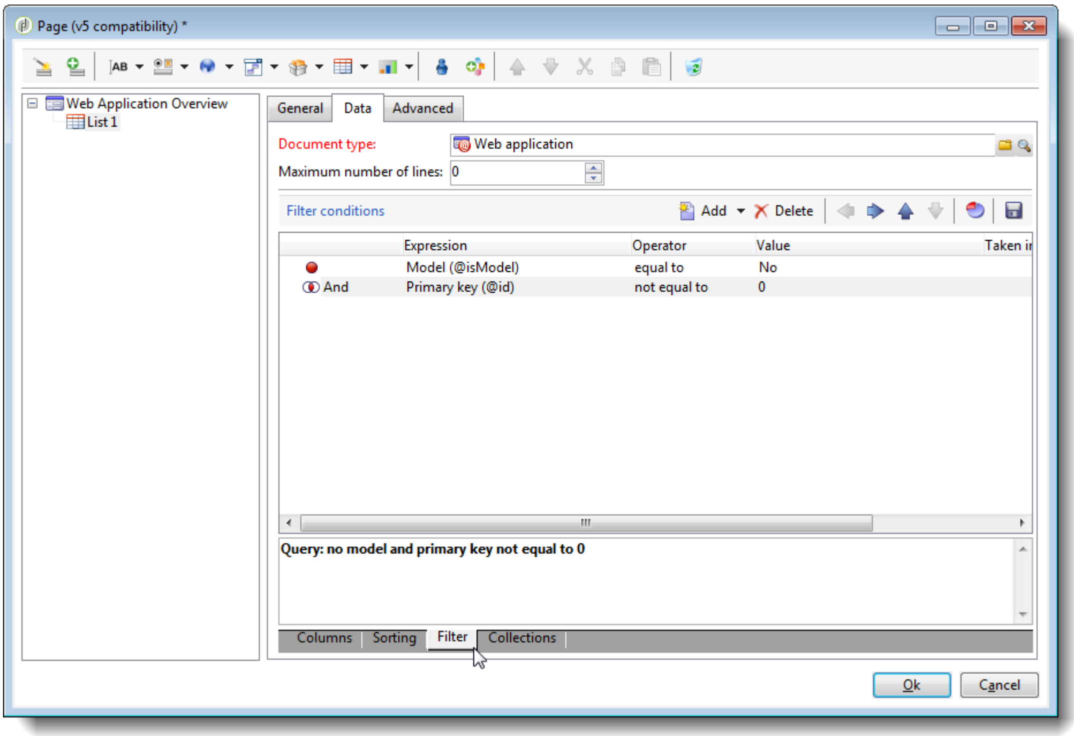
3. In the web application properties, modify the rendering of your application by selecting the **Single-page Web application** template.



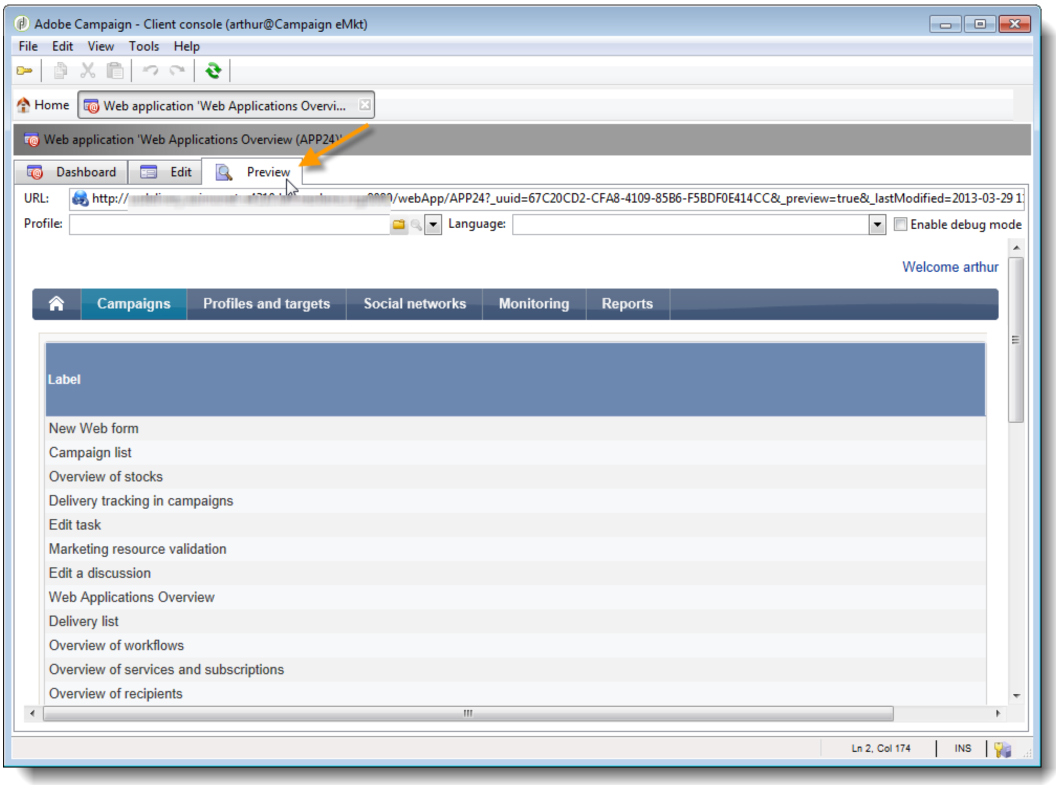
4. Open the **Page** activity of your web application and open a list (**Static element** > **List**).

5. In the **Data** tab of your list, select the type of **Web applications** document and the **Label**, **Creation date** and **Type of application** output columns.

6 In the **Filter** sub-tab, create the following filter as shown below in order to display web applications only and exclude templates from your view.



7 Close the configuration window of your page and click **Preview**.
The list of Web applications available in your database is displayed.



Creating a filter on a folder

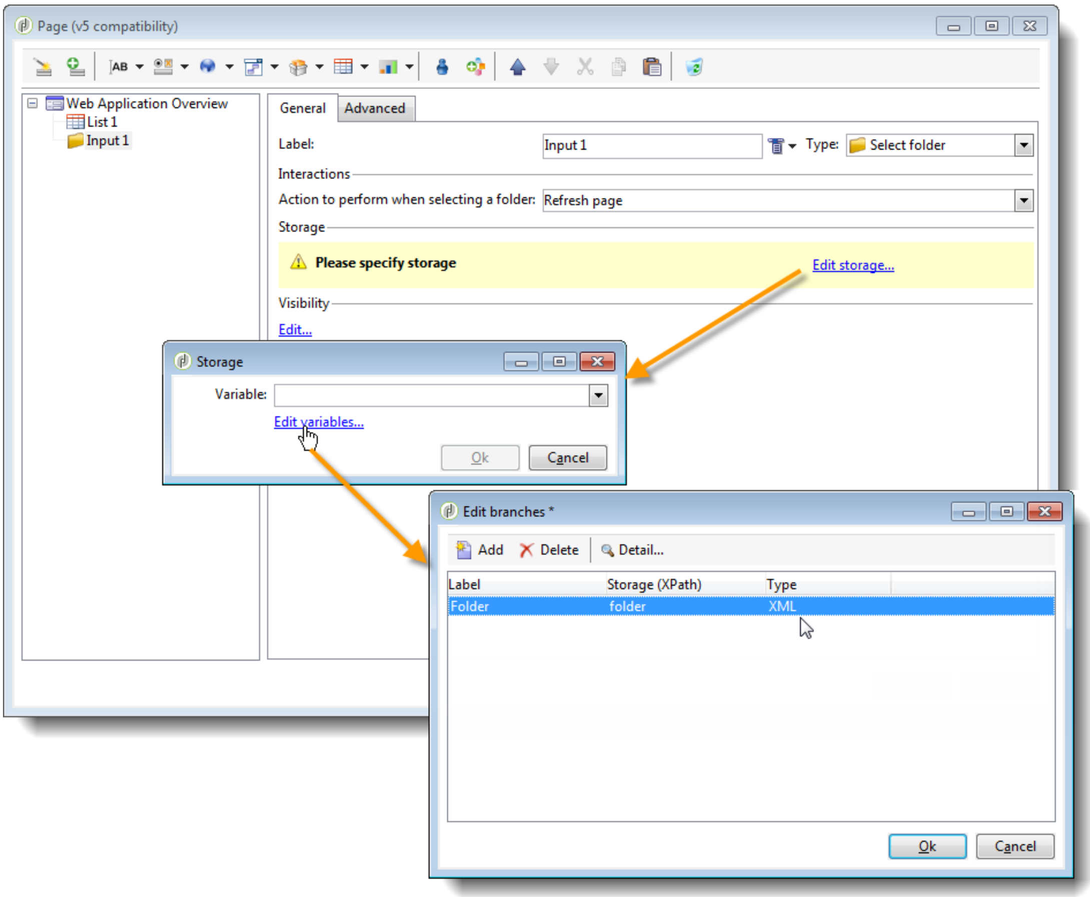
In an overview, you can choose to access data depending on its location in the Adobe Campaign tree. This is a filter on a folder. Apply the following process to add it to your overview.

1 Place your cursor on the **Page** node of your Web application and add a **Select folder** element (**Advanced controls** > **Select folder**).
2 In the **Storage** window which comes up, click the **Edit variables** link.
3 Change the variable label to suit your needs.
4 Change the variable name with the `folder` value.

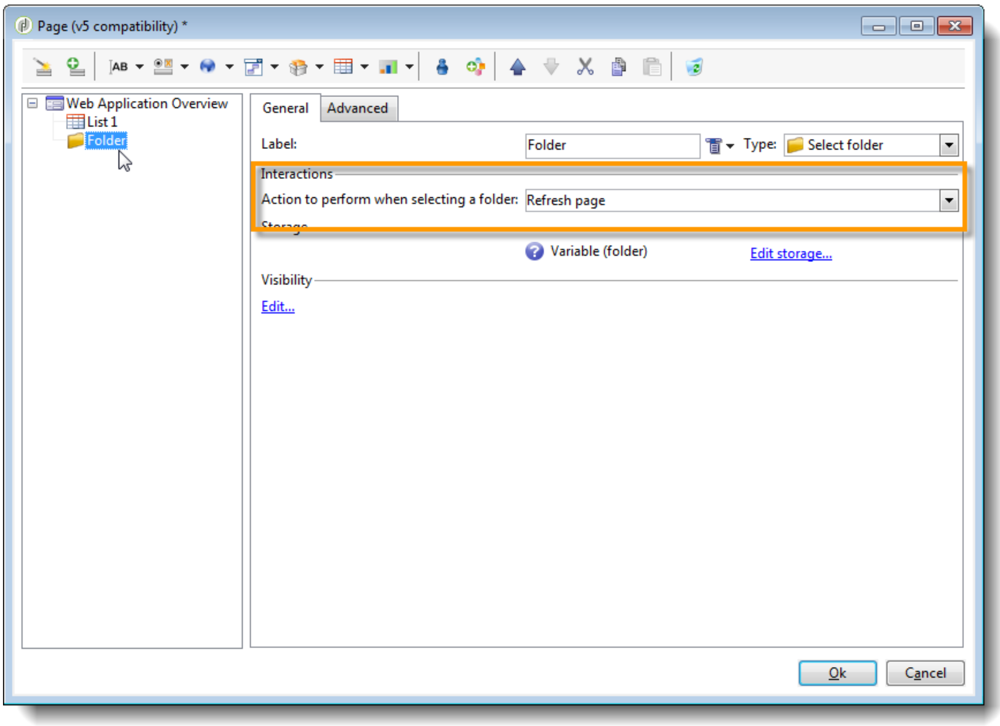
Note:

The name of the variable must match the name of the element linked to the folder (defined in the schema), i.e. **`folder`** in this case. You must re-use this name when you reference the table.

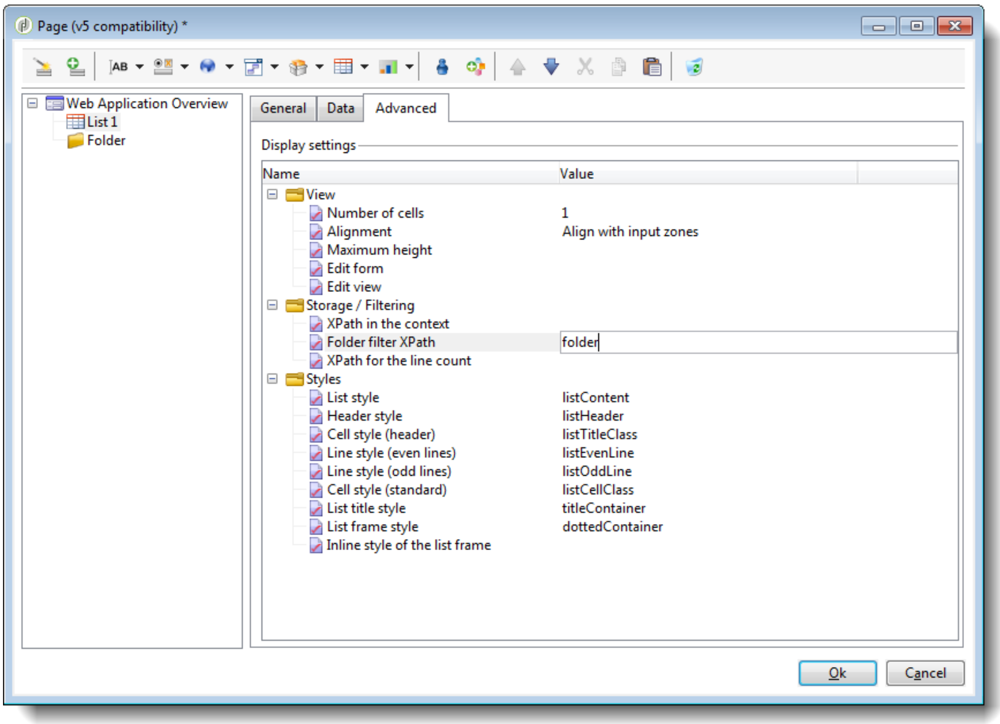
5 Apply the **XML** type to the variable.



6 Select the **Refresh page** interaction.



7 Place your cursor on your list, and in the **Advanced** tab, reference the variable previously created in the **Folder filter XPath** tab of the list. You must use the name of the element concerned by the folder link, i.e. `folder`.



Note:

At this stage, the Web application is not within its application context, the filter can therefore not be tested on the folder.

Creating a button to configure a new Web application

1. Place your cursor on the **Page** element and add a link (**Static elements** > **Link**).
2. Modify the link label since it will appear on the button in the overview.

   In our example, the label is *New*.
3. Insert the following URL in the URL field: **`xtk://open/?schema=nms:webApp&form=nms:newWebApp`**.

Note:

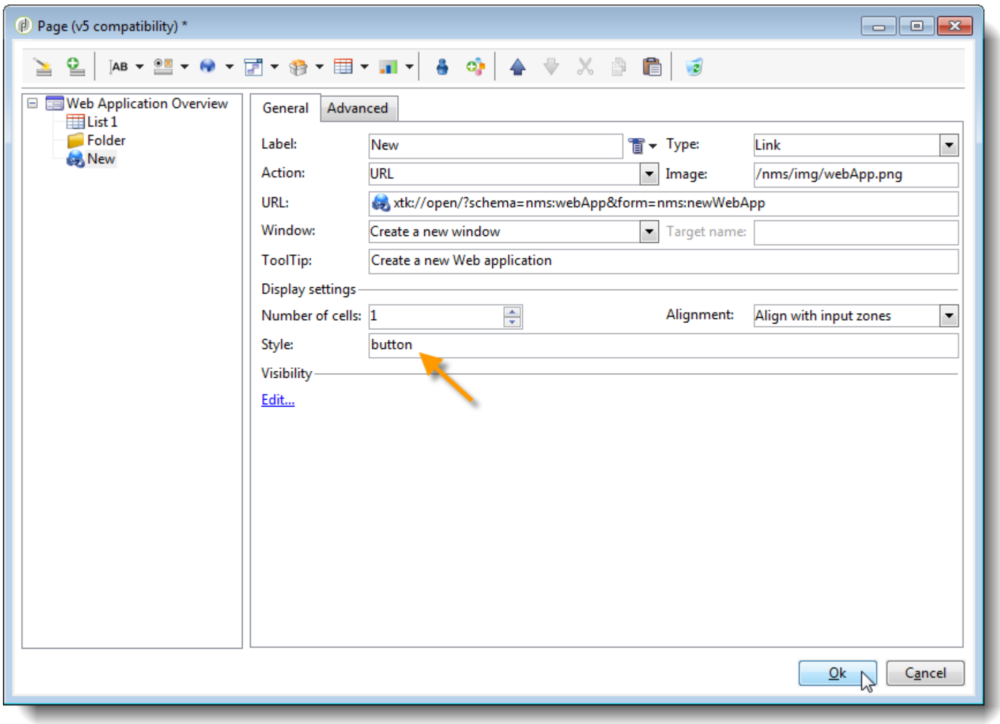
nms:webApp coincides with the Web application schema.

nms:newWebApp coincides with the new Web application creation wizard.

4. Choose to display the URL in the same window.
5. Add the web application icon in the image field: **`/nms/img/webApp.png`**.

   This icon will appear on the **New** button.
6. Enter `button` in the **Style** field.

   This style is referred to in the **Single-page Web application** template selected previously.

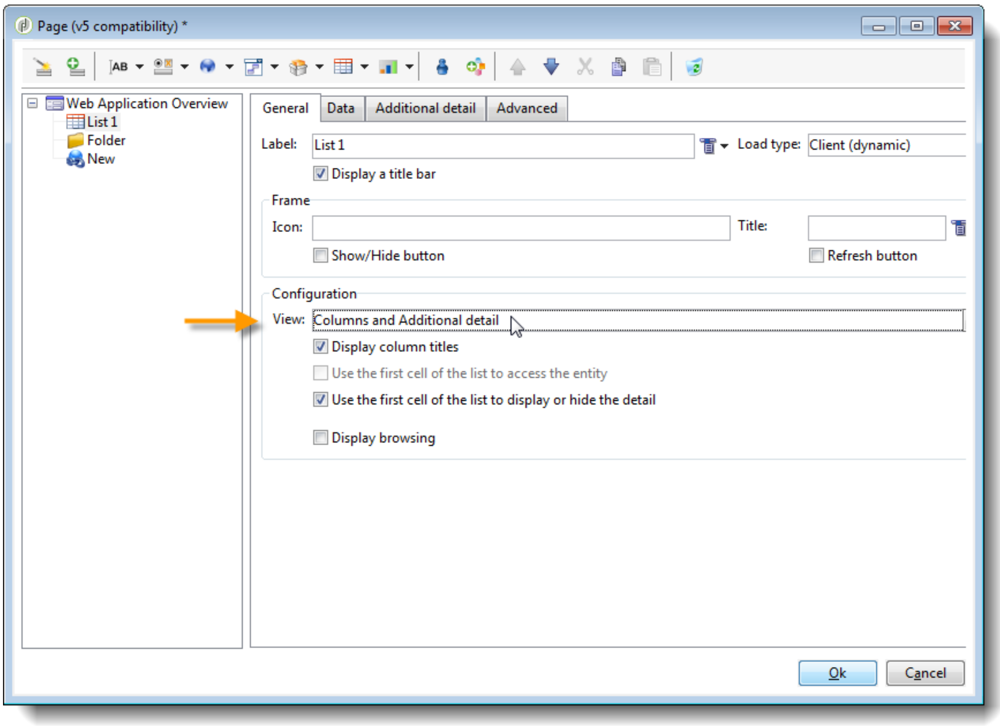


Adding a detail

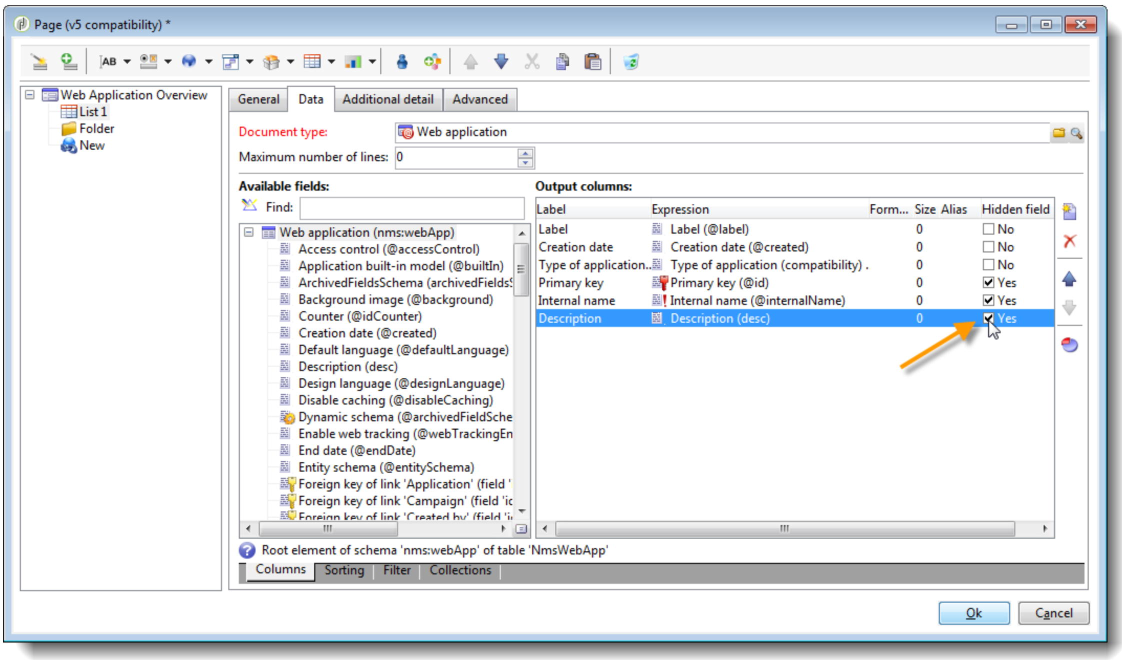
When you configure a list in your overview, you can choose to display additional details for each entry on your list.

1. Place your cursor on the previously created list element.

2 In the **General** tab, select the **Columns and additional detail** display mode in the drop-down list.



3 In the **Data** tab, add the **Primary key**, **Internal name** and **Description** column and select the **Hidden field** option for each one.



This way, this information will only be visible in the detail of each entry.

4 In the **Additional detail** tab, add the following code:

```
<div class="detailBox">
  <div class="actionBox">
    <span class="action"><img src="/xtk/img/fileEdit.png"/><a title="Open"
class="linkAction" href="xtk://open/?schema=nms:webApp&amp;form=nms:webApp&amp;pk=
```

```
    <%=webApp.id%>">Open...</a></span>
    <%
    if( webApp.@appType == 1 ) { //survey
    %>
    <span class="action"><img src="/xtk/img/report.png"/><a target="_blank"
title="Reports" class="linkAction" href="/xtk/report.jssp?_context=selection&amp;
      _schema=nms:webApp&amp;_selection=<%=webApp.@id%>
     &amp;__sessiontoken=<%=document.controller.getSessionToken()%>">Reports</a></span>

    <%
    }
    %>
  </div>
  <div>
    Internal name: <%= webApp.@internalName %>
  </div>
  <%
  if( webApp.desc != "" )
  {
  %>
  <div>
    Description: <%= webApp.desc %>
  </div>
  <%
  }
  %>
</div>
```

Note:

JavaScript libraries take five minutes to refresh on the server. You can restart the server to avoid waiting for this delay.

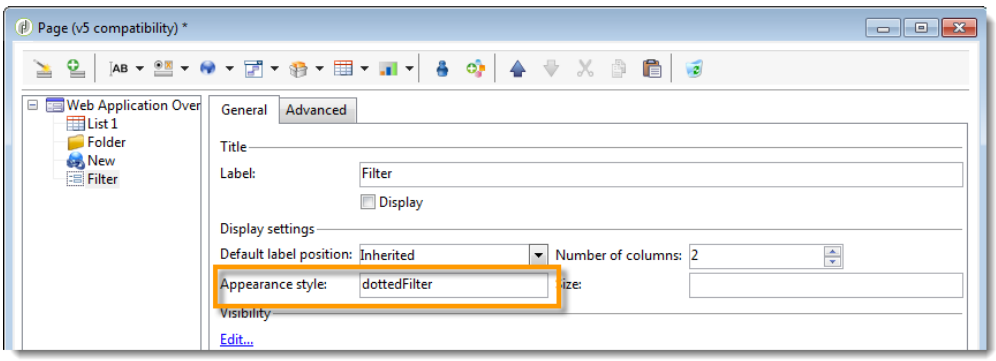
Filtering and updating the list

In this section, you will create a filter for displaying the overview of Web applications created by a specific operator. This filter is created with a link editor. Once you have selected an operator, refresh the list to apply your filter; this requires creating a refresh link.

These two elements will be grouped in the same container in order to be graphically grouped in the overview.

1 Place your cursor on the **Page** element and select **Container** > **Standard**.

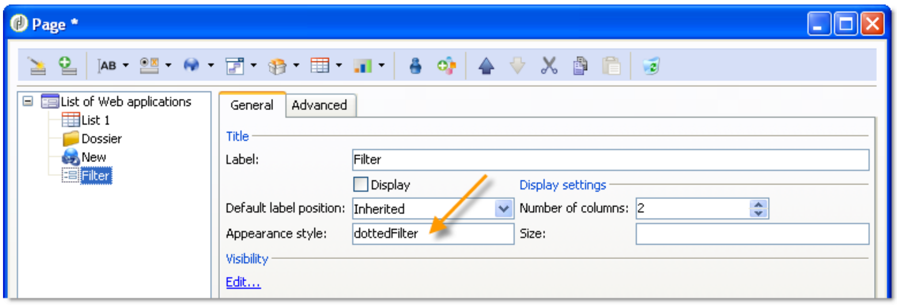
2 Set the number of columns to **2**, so that the link editor and the link are next to each other.



For information on element layout, refer to Overview [page 46].

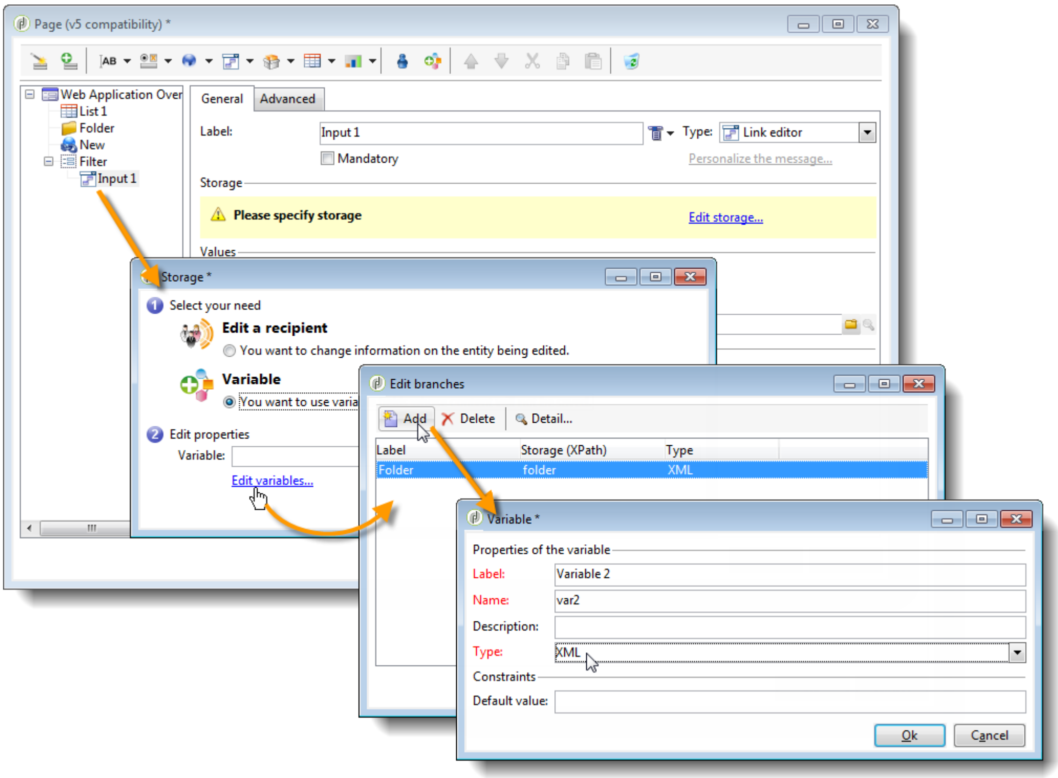
3 Apply **dottedFilter**.

This style is referred to in the **Single-page Web applicatio**n template selected previously.



Creating a filter using a link editor

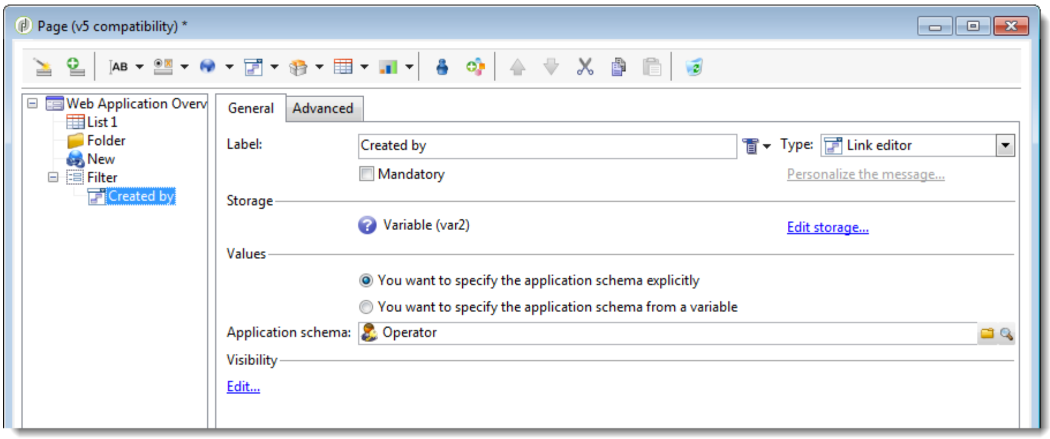
1. Place your cursor on the container created during the previous stage and insert a link editor via the **Advanced controls** menu.
2. In the storage window which opens automatically, select the **Variables** option, then click the **Edit variables** link and create an XML variable for filtering data.



3. Modify the label.

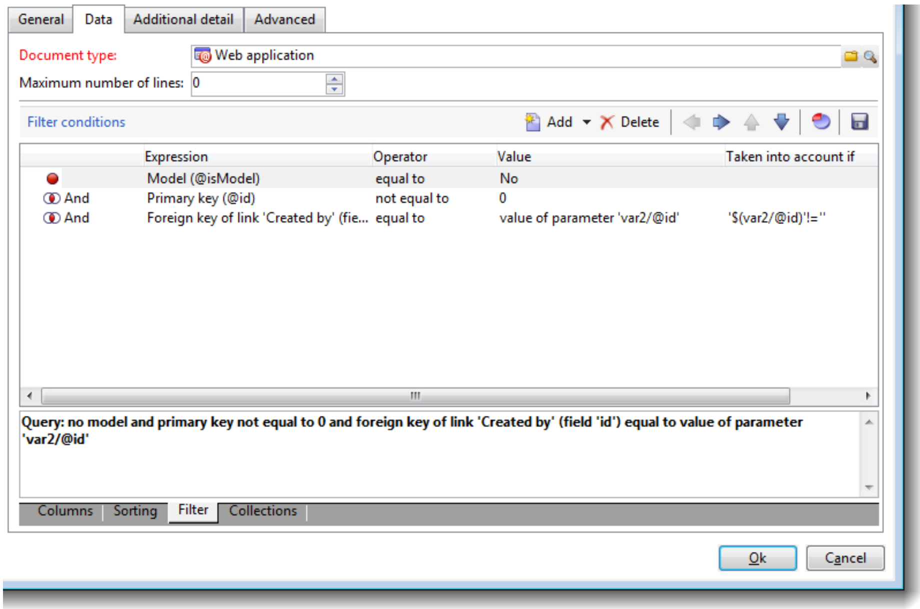
   It will appear next to the **Filter** field in the overview.

4 Choose the Operator table as an application schema.



5 Place your cursor on the list element and create a filter via the **Data** > **Filter** tab.

Value	Operator	Value	Taken into account if
Foreign key of the 'Created by' link	equals	$(var2/@id)	'$(var2/@id)'!=''



Warning:

The Web application user must be an identified operator with the appropriate Adobe Campaign rights to access the information. This type of configuration will not work for anonymous Web applications.

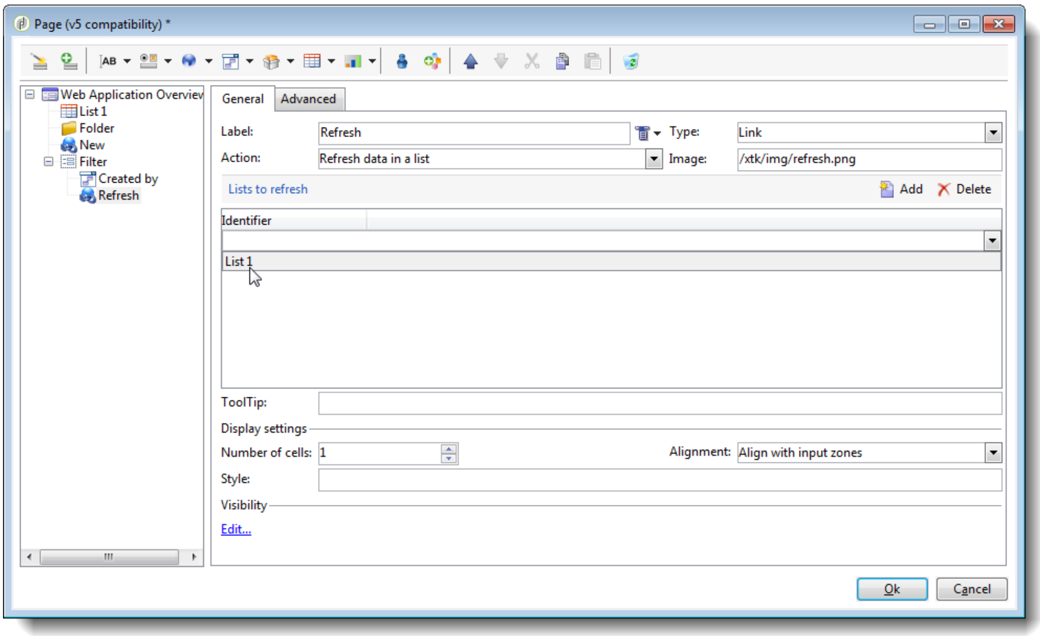
Creating a refresh link

1 Place the cursor on the container and insert a **Link** via the **Static elements** menu.

2 Modify the label.

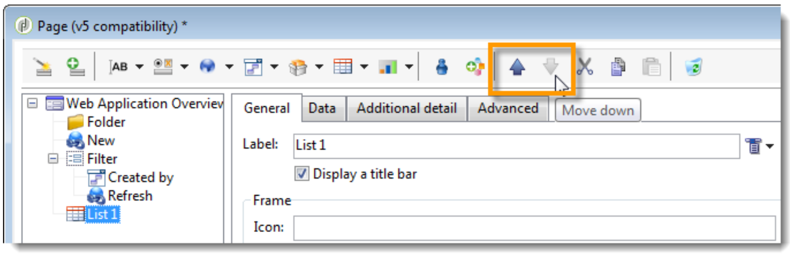
3 Select **Refresh data in a list**.

4 Add the previously created list.

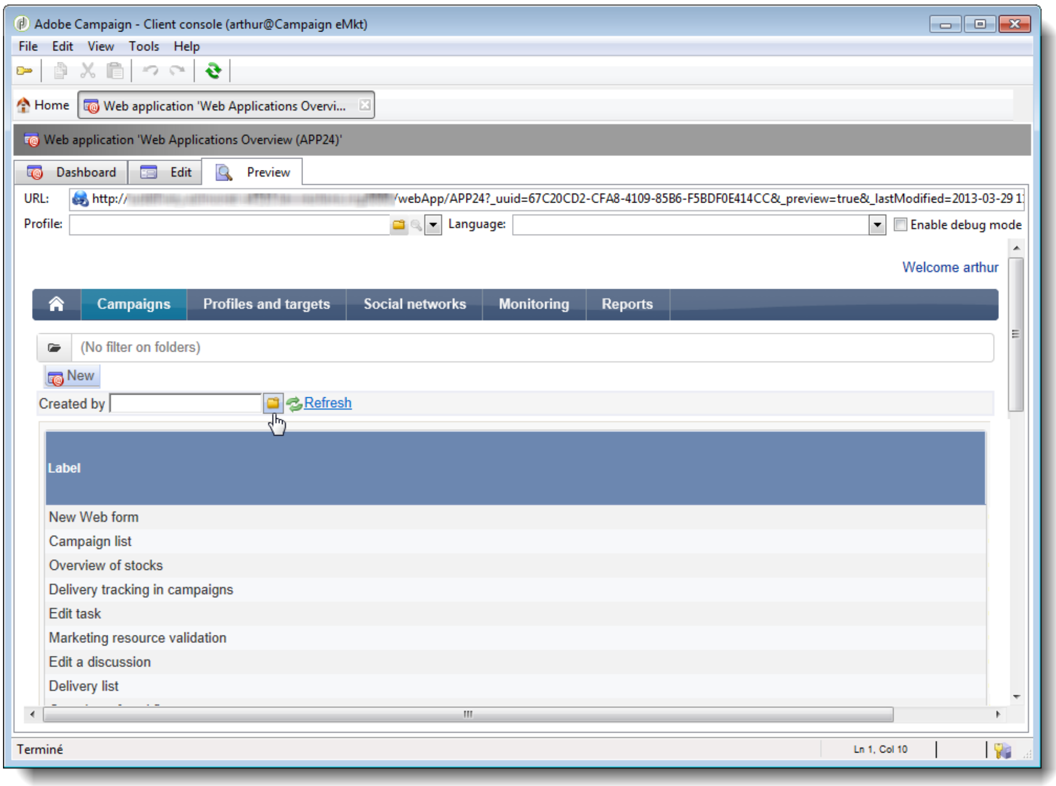


5 Add the refresh icon on the **Image** field: **`/xtk/img/refresh.png`** .

6 Using the sort-order arrows, reorganize the various elements of your web application as shown below.



The Web application is now configured. You can click the **Preview** tab to preview it.



Translating a web application

It is now possible to translate Web application pages created with **DCE (Digital Content Editor)**, the Adobe Campaign content editor.

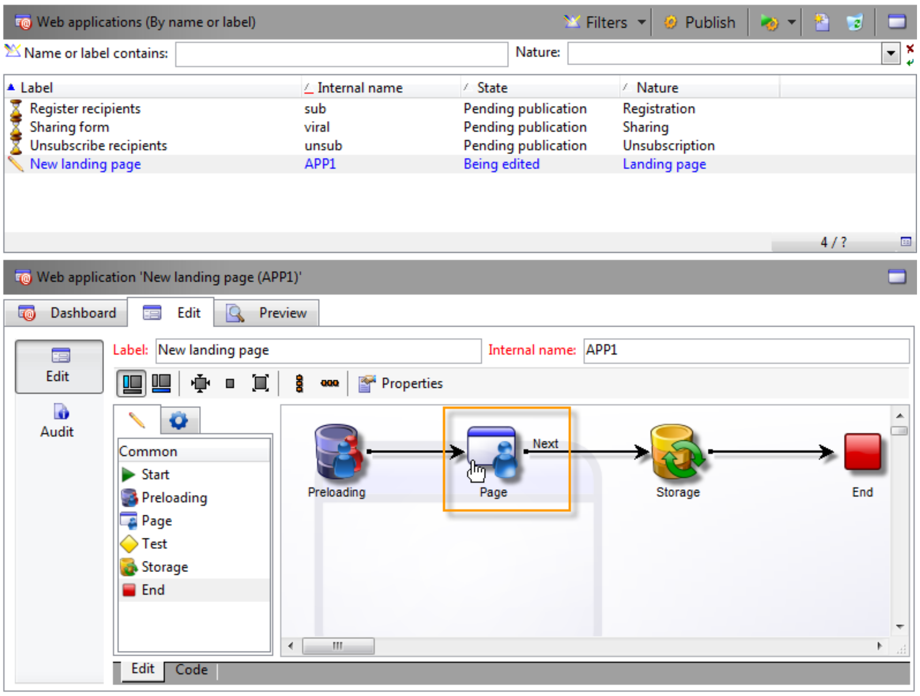
If you select at least one additional language via the **Localization** tab in the **Properties** of a Web application, a new option becomes available when adding an HTML content block in a page edited with DCE.

This option lets you indicate if the block content has to be translated or not.

Strings to be translated are collected the same way as the other strings of the Web application, via the **Translations** tab of the application. For more on this, refer to Translating a form.

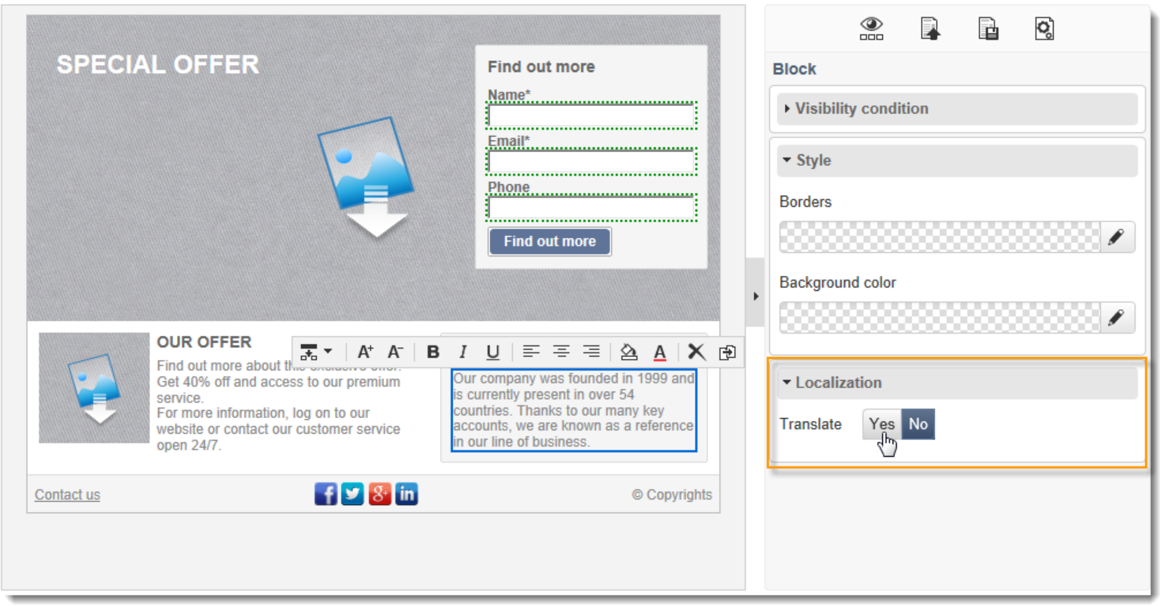
To flag the strings to be translated :

1 Open a content page edited with DCE in a Web application.



2 Select an HTML block.

3 In the parameters block on the right, the **Localization** option lets you flag the content of the selected block. By default, only the page title is to be translated.



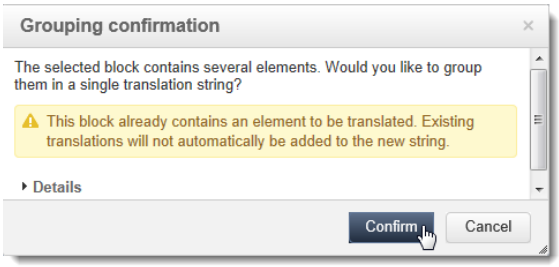
Note:

Strings must not exceed 1023 characters.

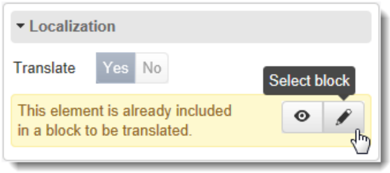
There are three particular cases :

- When the selected block contains several strings/blocks, it is flagged as a single string to be translated. The string contains then the HTML code of the elements inside this block.

- When you want to flag a block that contains several strings and if at least one of these strings is already flagged, a warning is displayed. You can then remove the flag from the isolated string and add the entire block.



- When you want to remove the flag from a string contained in a block which is already flagged, you cannot directly modify the string translation option. However, you can access the block containing the string in order to change it.



4. Once you have finished flagging the strings, go back to the Web application and select the **Translations** tab.
5. Select **Collect the strings to translate**. The strings flagged in DCE are added to the Web application's strings.

Note:

Once the strings have been collected, they will not be removed from the list if you remove the translation flag in DCE. This allows to keep them in the translation memory.

6. Translate and approve the strings.

   You can then preview the translations by selecting the desired language from the **Preview** tab in the Web application.

Web application tracking

This version of Adobe Campaign allows you to track and measure visits on Web application pages by inserting tracking tags. This functionality can be used for all Web application types (forms, online surveys, Web pages created using DCE, etc.).

Thus, you can define several navigation paths and assess their success. The data recovered is then available in the reports of each application.

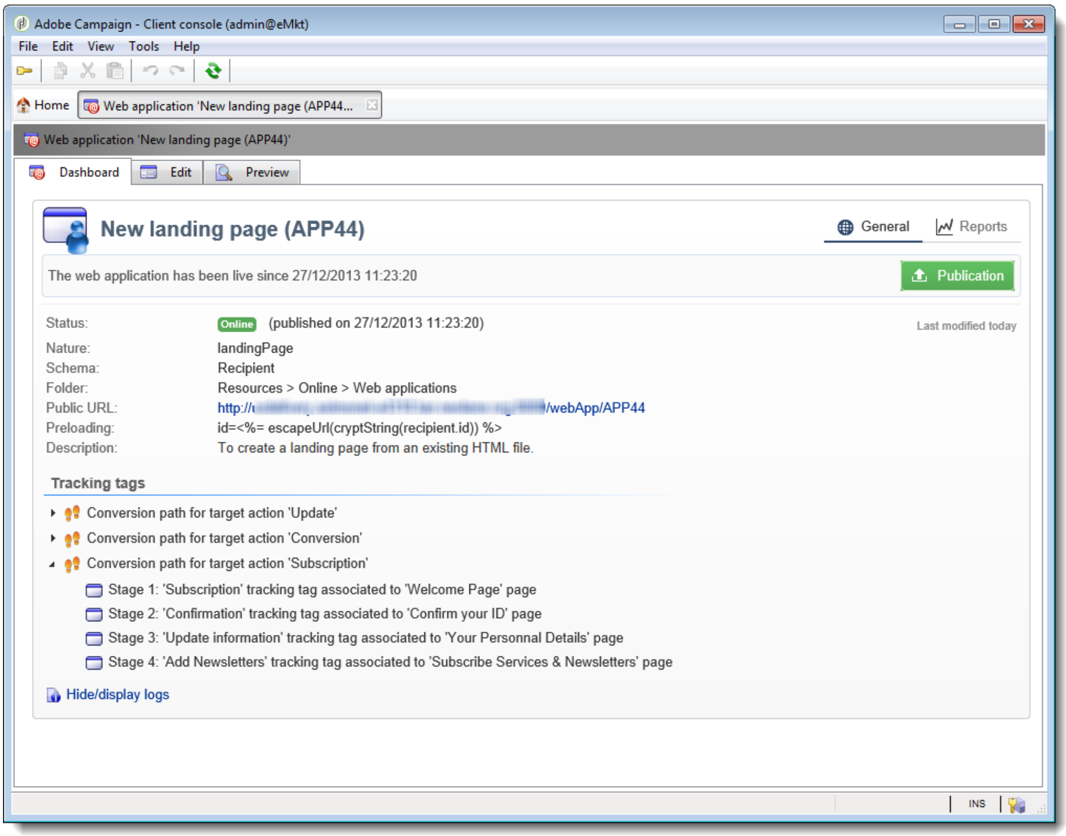
Note:

The details for configuring and implementing tracking for Web applications are presented in the Microsites chapter.

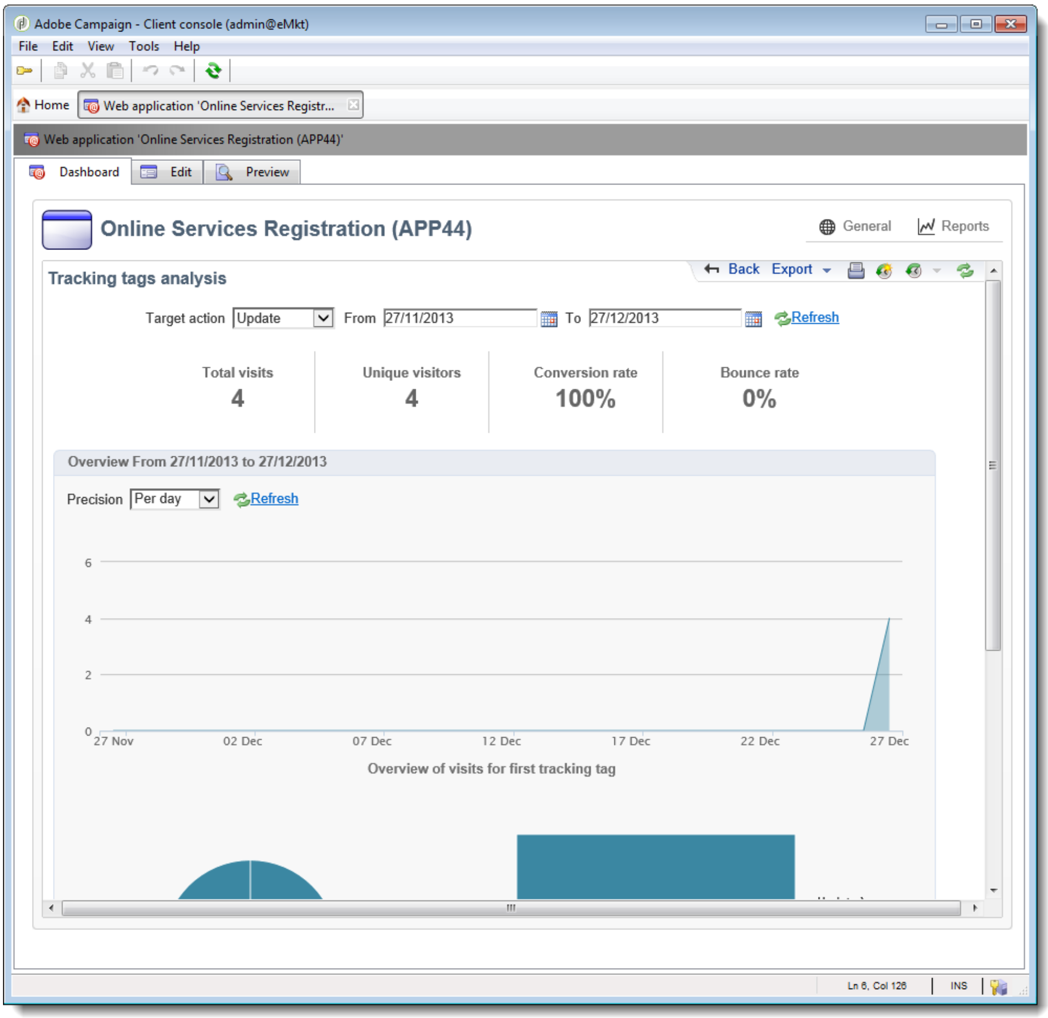
The main improvements featured in this version are as follows:

- Possibility to insert several tracking tags on the same page in order to ease the navigation paths definition (e.g. purchase, subscription, return, etc.).

- Viewing navigation paths and tracking tags of the different pages in the Web application dashboard.



- Generating a full tracking report.



The main indicators are as follows :

- Conversion rate: number of persons who displayed all steps of a navigation path.
- Bounce rate: number of persons who displayed the first step only
- Conversion tunnel: loss rate between each step.

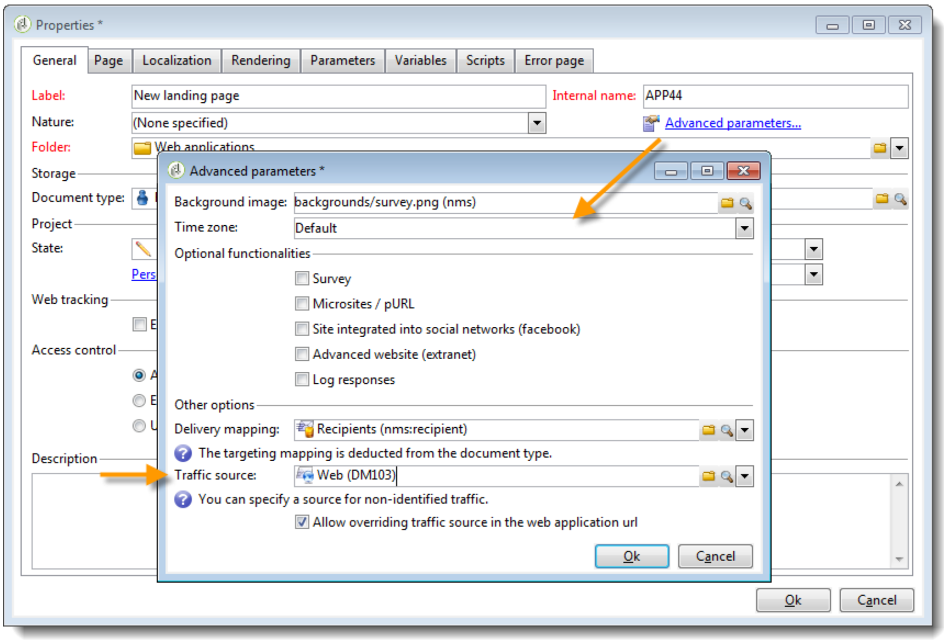
In addition, a Sector type chart shows the population according to its source.

Traffic source

Two different modes enable you to identify where the Internet user comes from when navigating in a Web application :

1. By sending a specific delivery to grant access to the Web application pages: in this case, the traffic source is this delivery,

2 By associating the Web application to a dedicated traffic source: in this case, it must be an external 'traffic source' type delivery. It can be selected from the Web application properties or from the target mapping.



In order to identify the traffic source in a Web application, Adobe Campaign successively looks for the following information :

1 the source delivery identifier, if it exists (nlId cookie),

2 the pURL, if it exists,

3 the identifier of the external delivery defined in the Web application properties, if it exists,

4 the identifier of the external delivery defined in the target mapping, if it exists.

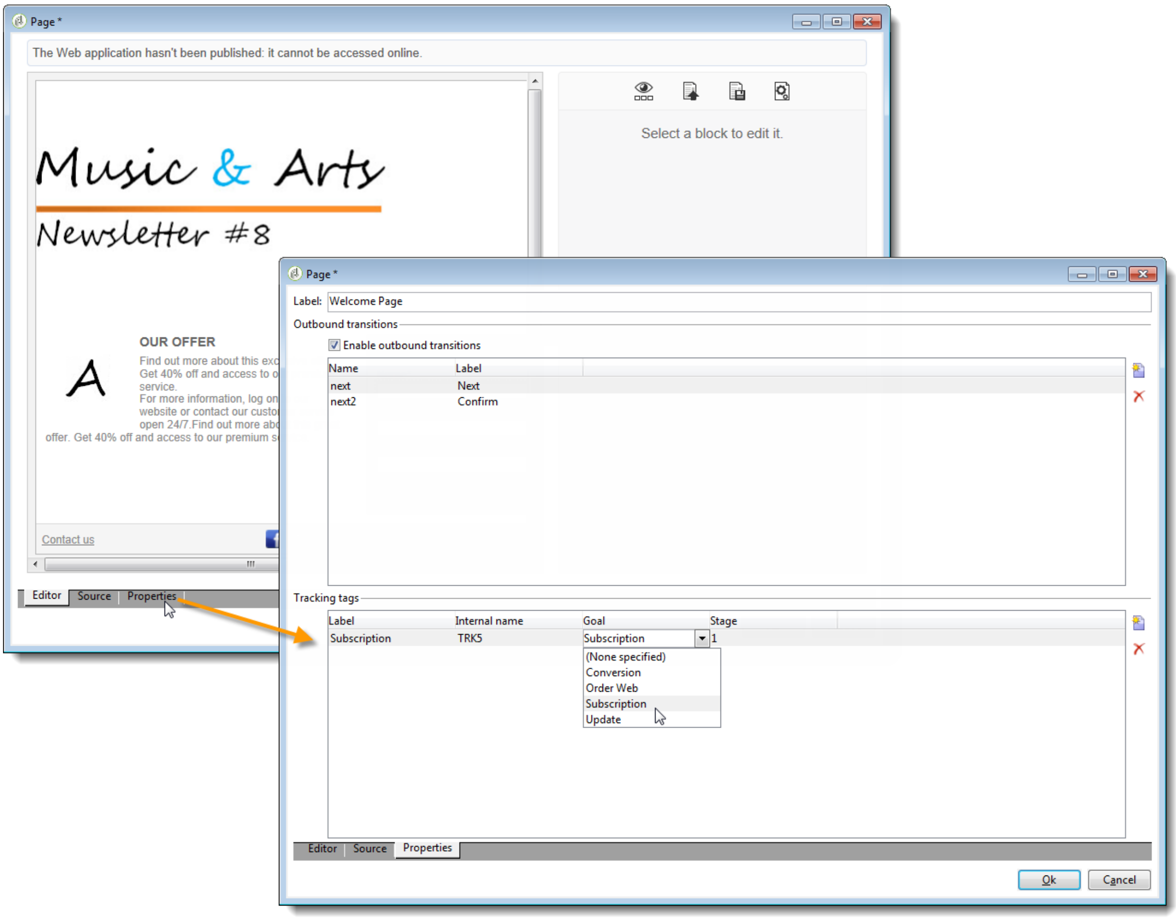
Note:

Remember that anonymous tracking is only possible if the corresponding option has been activated in the deployment wizard.

For more on this, refer to the **Installation Guide**.

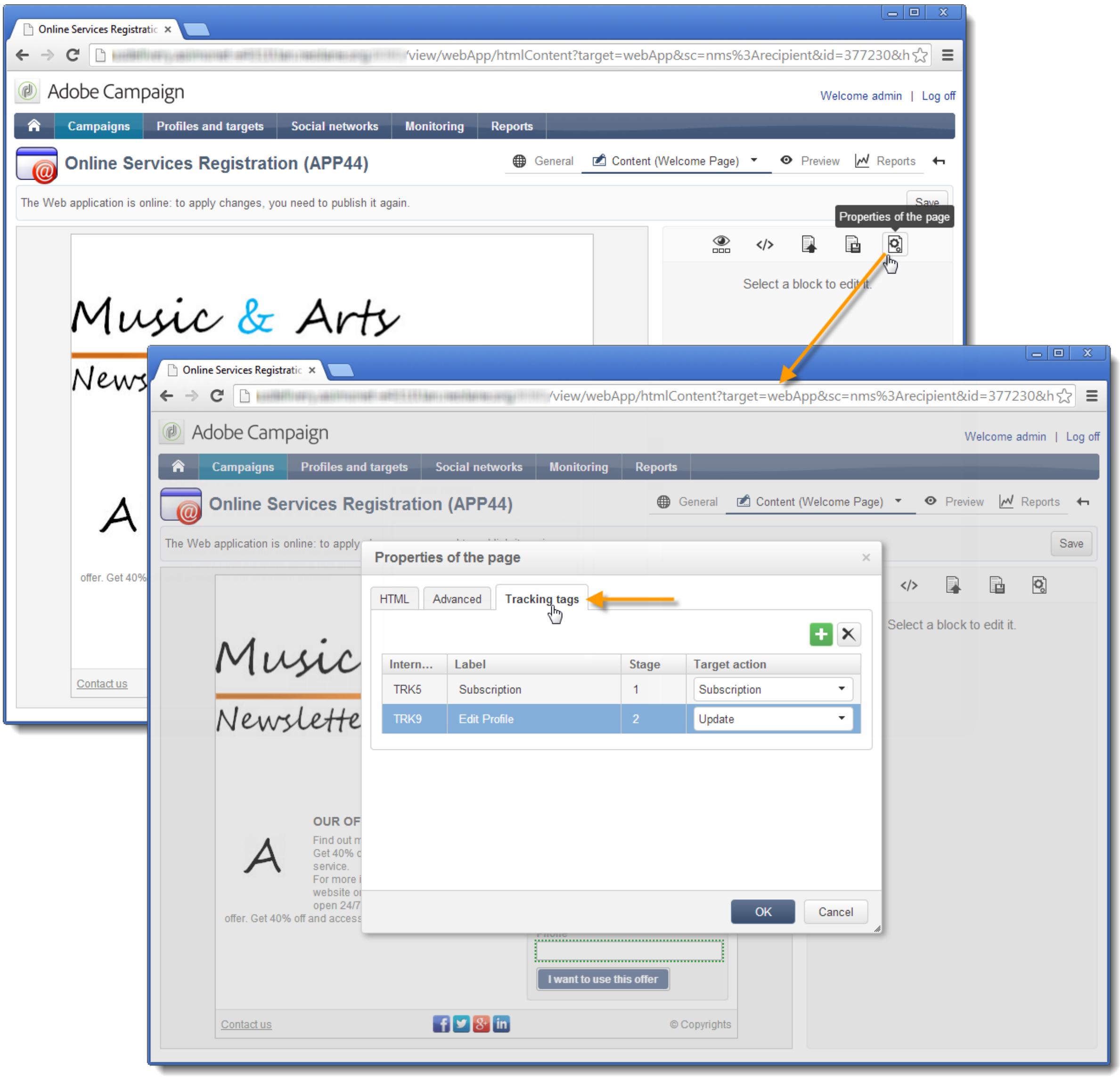
Web applications created with Digital Content Editor (DCE)

When a Web application is created using the HTML content editor - **Digital Content Editor (DCE)** - tracking tags are inserted from the **Properties** tab of the editor.

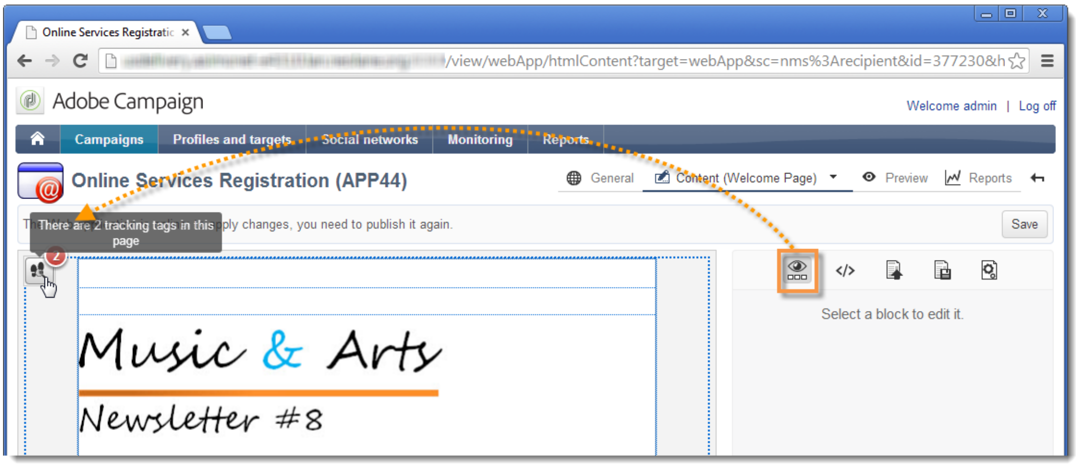


Note:

When using the Web interface, tracking tags must be inserted from the page properties.



The **Display blocks** icon lets you view the number of tracking tags defined for the page.



Tracking Opt-out

This feature enables you to stop tracking web behaviors of end-users who opt-out of behavioral tracking via cookies or web beacons. The feature includes the ability to display a banner to present the end-user with that option; you may add these banners into Web applications or Landing Pages.

If an end-user opts-out of behavioral tracking via cookies or web beacons, then that information is transmitted to the Adobe Campaign tracking server with JavaScript APIs. Please note that some jurisdictions may require that Customer present end-users with an opt-in before an opt-out can be offered (or have other legal requirements), and it is Customer's responsibility to comply with applicable laws.

Configuration

To be displayed within Web applications or Landing pages, the banner needs to be configured.

Adobe Campaign is delivered with a sample banner that you must adapt to your needs. This banner version appears as a personalization block located in the content model folder. Refer to the Personalization Blocks section.

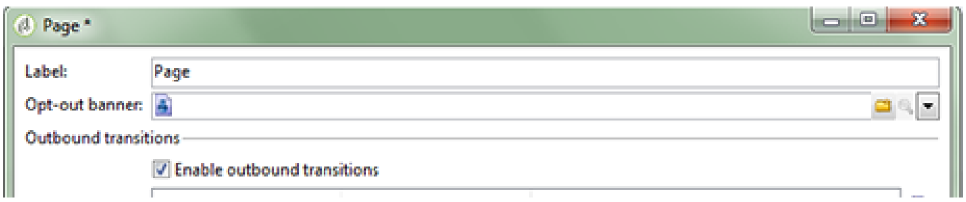
Warning:

To create your own banner, you must personailze the out-of-the-box banner.

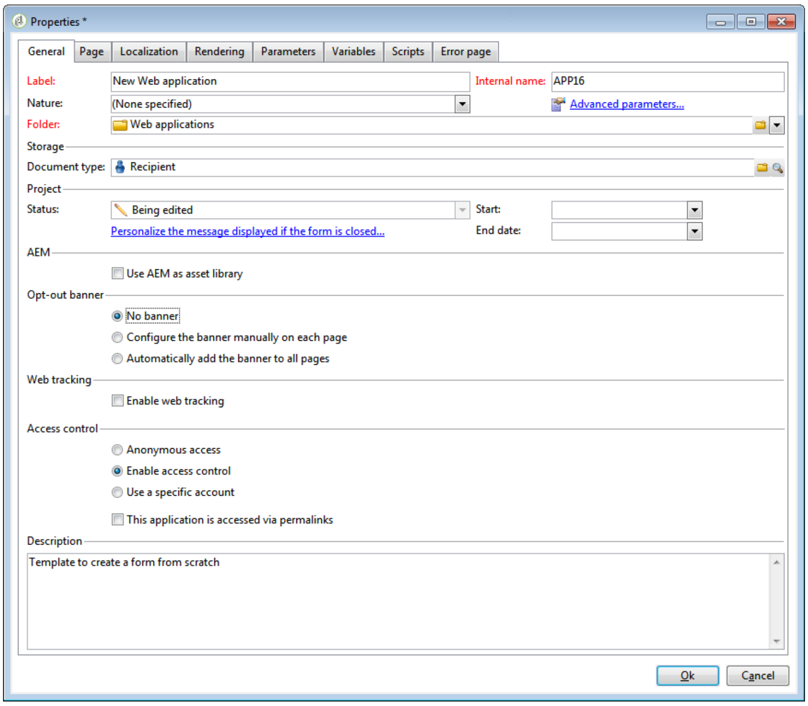
To activate the banner, you have to configure the Web application properties. Refer to the General operation [page 162] section.

If the web tracking is activated, you can either have:

- No banner.
- Configure the banner manually on each page: check this option and select the banner in each page in the page properties.



- Automatically add the banner to all pages: select the banner directly in the Web application properties.



Note:

A compatibility mode is available for the v5 Web Application with the same behavior.

The default banner has the following structure:

```
<div onClick="NL.ClientWebTracking.closeOptOutBanner(this);" id="defaultOptOutBanner">
  <p>Please insert your message here
   <a onClick="NL.ClientWebTracking.allow();" class="optout-accept">Accept</a>
   <a onClick="NL.ClientWebTracking.forbid();" class="optout-decline">Refuse</a>
  </p>
</div>
```

You must replace the **Please insert your message here** with the block containing your tracking information. This replacement should be executed in your new personnalization block related to the Opt-out banner.

The banner is delivered with a specific CSS. However, you can overwrite the styles when creating and configuring a webpage. Refer to the Creating content [page 13] section.

API

Adobe Campaign is delivered with APIs that allows you to manage the cookie value and to retrieve user preferences.

The cookie name is **acoptout**. The common values are:

- 0: user has allowed web tracking (default value)
- 1: user has forbidden web tracking
- null: user has not chosen but web tracking is allowed as it is the default value

The available client-side APIs to customize the banner are:

- **NL.ClientWebTracking.allow()**: Sets the opt-out cookie value to allow web tracking. Web tracking is allowed by default.
- **NL.ClientWebTracking.forbid()**: Sets the opt-out cookie value to forbid web tracking. Web tracking needs a user input to be forbidden.

- **NL.ClientWebTracking.closeOptOutBanner(bannerDomElt)**: Closes the opt-out cookie banner after the user has clicked the Accept or Refuse button. (during the click event bubbling phase)

  bannerDomElt {DOMElement} the root DOM element of the cookie banner that needs to be removed
- **NL.ClientWebTracking.hasUserPrefs()**: Returns true if the user has chosen his preferences for web tracking.
- **NL.ClientWebTracking.getUserPrefs()**: Returns the opt-out cookie value that defines the user's preferences.

If you have to write a JSSP, Server-Side APIs are available:

- **NL.ServerWebTracking.generateOptOutBanner(escapeJs)**:Generates the markup for the opt-out banner to insert in the JSSP page
  - **escapeJs {Boolean}**: true when the generated markup needs to be escaped to be used inside JavaScript.

  It returns the HTML of the opt-out banner markup that needs to be printed in the page.
- **NL.ServerWebTracking._displayOptOutBanner()**

  Returns true if the opt-out banner should be displayed after an opt-out banner was selected by the administrator

  This code is called when the administrator has already chosen to use the web tracking opt-out banner.

  The banner should be displayed if the user has not yet chosen to be tracked or not.
- **NL.ServerWebTracking.renderOptOutBanner(escapeJs)**

  Renders the markup for the opt-out banner by inserting it into the JSSP page. It is called as is in Jssp between <% %>
  - **escapeJs {Boolean}**: true when the generated markup needs to be escaped to be used inside JavaScript

JSSP example:

```
<%@ page import="/nl/core/shared/nl.js" %>
<!doctype html>
<%
NL.require('/nl/core/shared/webTracking.js');
NL.client.require('/nl/core/shared/webTracking.js');
logonEscalation('admin');
%>
<html>
<head>
<%==NL.client.deps()%>
</head>

<body>


<!-- TEST USING SERVER API IN JSSP -->
<%
var webTracking = new NL.ServerWebTracking(request, 'optOutBanner');
webTracking.renderOptOutBanner();
%>

<!-- TEST USING SERVER API IN A SCRIPT -->
<!--
<%
var webTracking = new NL.ServerWebTracking(request, 'optOutBanner');
%>
<script>var el = document.createElement('div'); el.innerHTML =  "<%
webTracking.renderOptOutBanner(true); %>";document.body.appendChild(el);</script>
-->

<!-- TEST OF THE CLIENT API -->
<!--
<div onClick="NL.ClientWebTracking.closeOptOutBanner(this);" id="defaultOptOutBanner">
  <p>Please insert your message here
   <a onClick="NL.ClientWebTracking.allow();" class="optout-accept">Accept</a>
   <a onClick="NL.ClientWebTracking.forbid();" class="optout-decline">Refuse</a>
  </p>
</div>
-->
</body>
</html>
```

CHAPTER 5

Online surveys

Table of Contents

Overview

Introduction

Adobe Campaign includes a graphical module to define and publish Web applications. This is used to create pages, such as an edit form on an extranet, or notification forms including data from the database with tables, charts, input forms, etc. This functionality lets you design and post web pages where users can look up or enter information.

The optional **Survey** module lets you create a new type of Web application to create and manage online questionnaires, such as forms to add or modify profile information, to subscribe to or unsubscribe from an information service, or a competition entry form. Once answers have been collected, they are stored in the database or in local variables. The data model can be extended dynamically via the answers given to questionnaires. You can view the results in real time, filter the responses, and analyze them using dedicated charts.

This chapter details the method for creating and managing **Surveys**, field and page management, storage modes and records.

The steps for creating a standard Web form are detailed in Overview [page 46].

Web application management is detailed in Overview [page 161]. Please refer to this chapter for more information.

Main functionalities

In Adobe Campaign, Web applications in general let you access the following functionalities:

- Multiple-page form creation,
- Multilingual survey management with an integrated translation tool,
- Graphical page management interface, multiple-column page layout,
- Rendering personalization and field position,
- Conditional display of survey fields according to answers,
- Conditional page display,
- Checking information before approval, depending on the type of data expected (number, email address, dates, etc.) and mandatory fields,
- Email invitations/notifications,
- Personalization of error and end messages,
- Use of images, videos, hypertext links, captcha, etc.

Note:

All configurations linked to Web forms are detailed in Web Forms [page 45]. Refer to this document for details on concepts and on Web form functionalities using Adobe Campaign.

The optional survey creation module (**Survey**) offers the following additional functionalities:

- Dynamic extension of the database: creation of answers which aren't part of the initial data model. For more on this, refer to Survey answer storage [page 204].
- Score management. For more on this, refer to Score management [page 211].
- Random displaying of questions. For more on this, refer to Random display of questions [page 204].
- Real time tracking of answers. For more on this, refer to Response tracking [page 215].
- Generating dedicated reports. For more on this, refer to Reports on surveys [page 216].

Compared to Web applications, surveys have a simplified graphical interface with a reduced number of editing controls.

Implementation steps

Apply the following steps to create and deliver a survey and process its results:

1. Create the pages of the survey and their content (input fields, drop-down lists, questions, etc.).
2. Define how answers should be saved.

   A data pre-loading step can be inserted in order to pre-load the form with data already in the database. You can also add a test box.
3. Publish, then deliver the survey to recipients (e.g. in a delivery action or via an internet site).
4. Monitor responses and view reports.

For more information on configuring and sequencing these steps, refer to Overview [page 46]. Only configurations specific to surveys are detailed below.

Configuration

Surveys are stored in the **Resources > Online > Web Applications** node of the Adobe Campaign tree. Configurations are found in the following folders:

- **Administration > Configuration > Form rendering**: contains the rendering templates for Web form presentation (applications and surveys).
- **Resources > Templates > Web application templates**: contains the form templates. To create a form, you need to start with a template.

Note:

Configuration information is available in Overview [page 46].

Quick Start

Introduction

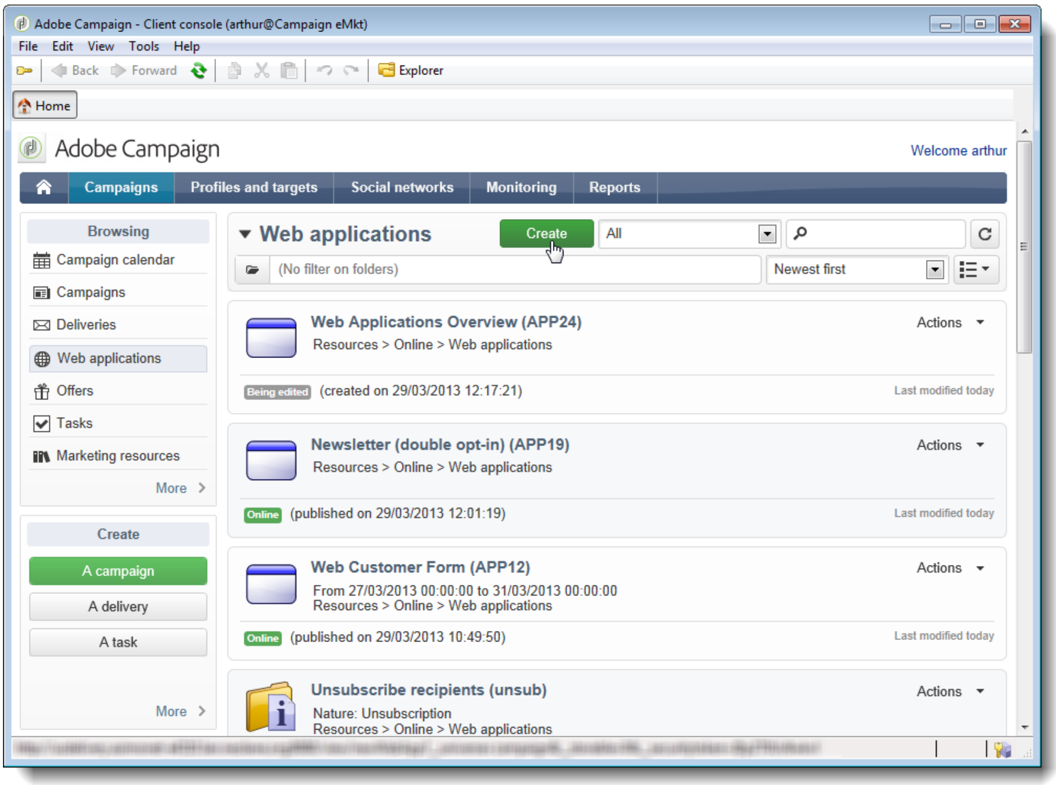
Here is a quick overview of the main steps to create a simple survey, using the following template:

These steps are:

1. Step 1 - Creating a survey [page 190],
2. Step 2 - Selecting the template [page 190],
3. Step 3 - Building the survey [page 190],
4. Step 4 - Creating the page content [page 192],
5. Step 5 - Storing data [page 196],
6. Step 6 - Publishing the pages [page 196],
7. Step 7 - Delivering the online survey [page 198].

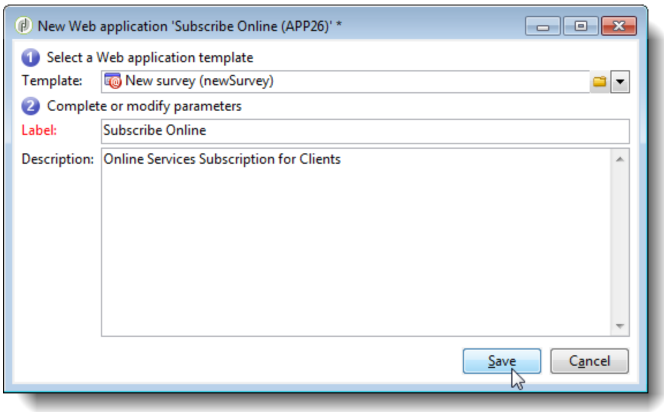
Step 1 - Creating a survey

To create a new survey, go to the **Campaigns** or **Profiles and targets** universe and click the **Web Applications** menu. Click the **Create** button above the list of forms.



Step 2 - Selecting the template

Select a survey template, then give the survey a name. This name will not be seen by end users, but it allows the survey to be identified within Adobe Campaign. Click **Save** to add the survey to the list of Web applications.



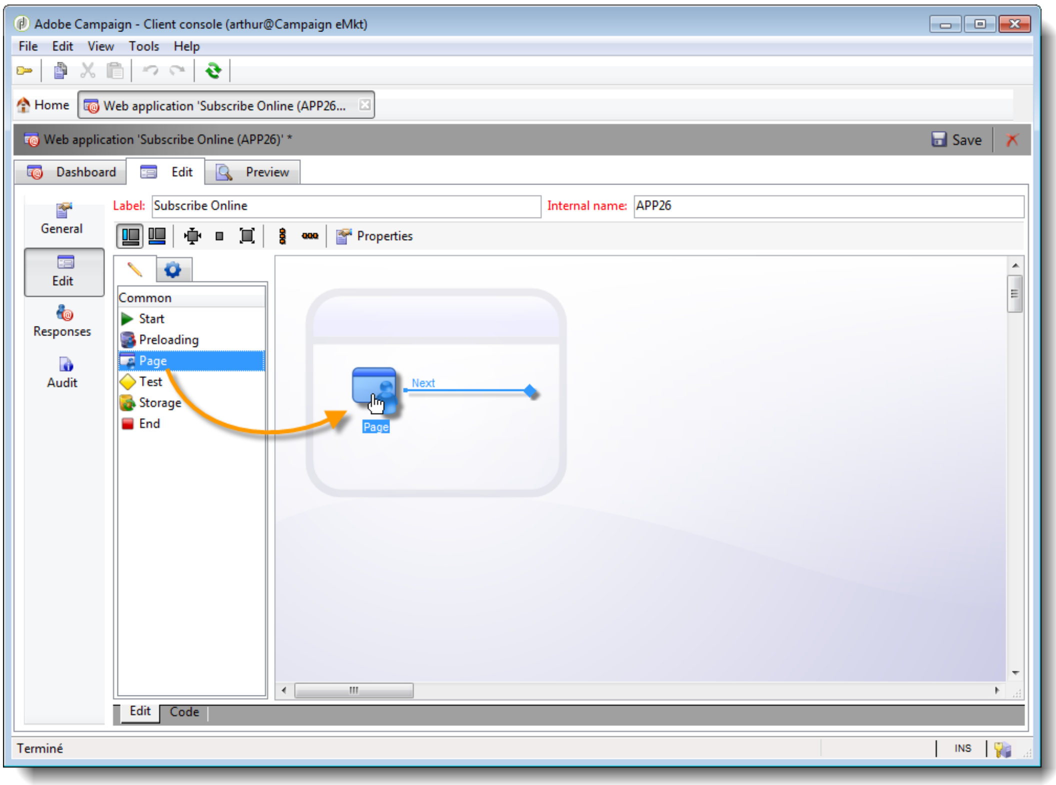
Step 3 - Building the survey

Surveys are built in a diagram where the following elements are positioned: the page(s) where the content will be created, the data preloading and saving steps, and the testing phases. Scripts and queries can also be inserted.

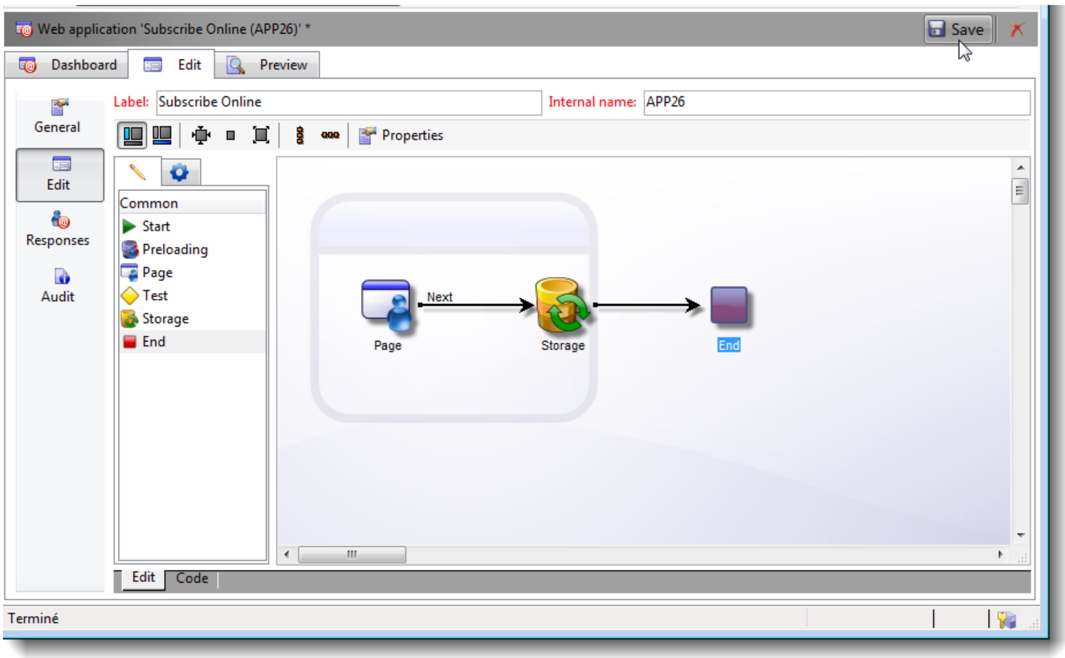
To build the chart, click the **Edit** form of the survey.

A survey must contain **at least** the following three components: a page, a storage box, and an end page.

- To create a page, select the **Page** object in the left-hand section of the editor and deposit it in the middle section, as shown below:



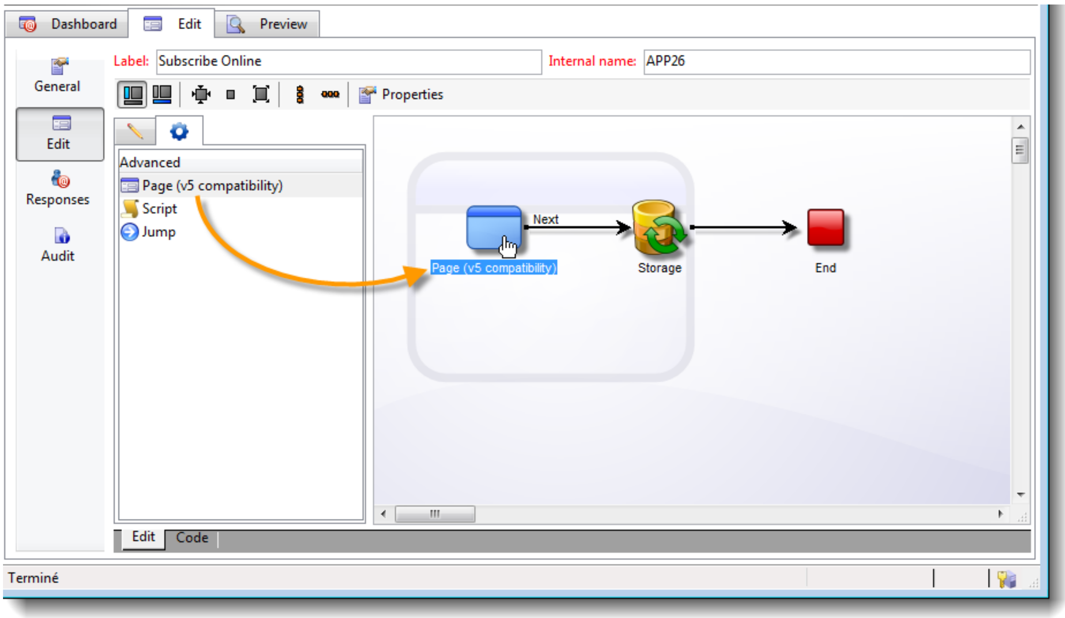
- Next, select the **Storage** object and place it on the output transition of the page.
- Finally, select the **End** object and place it on the end of the output transition of the storage box to obtain the following diagram:



Step 4 - Creating the page content

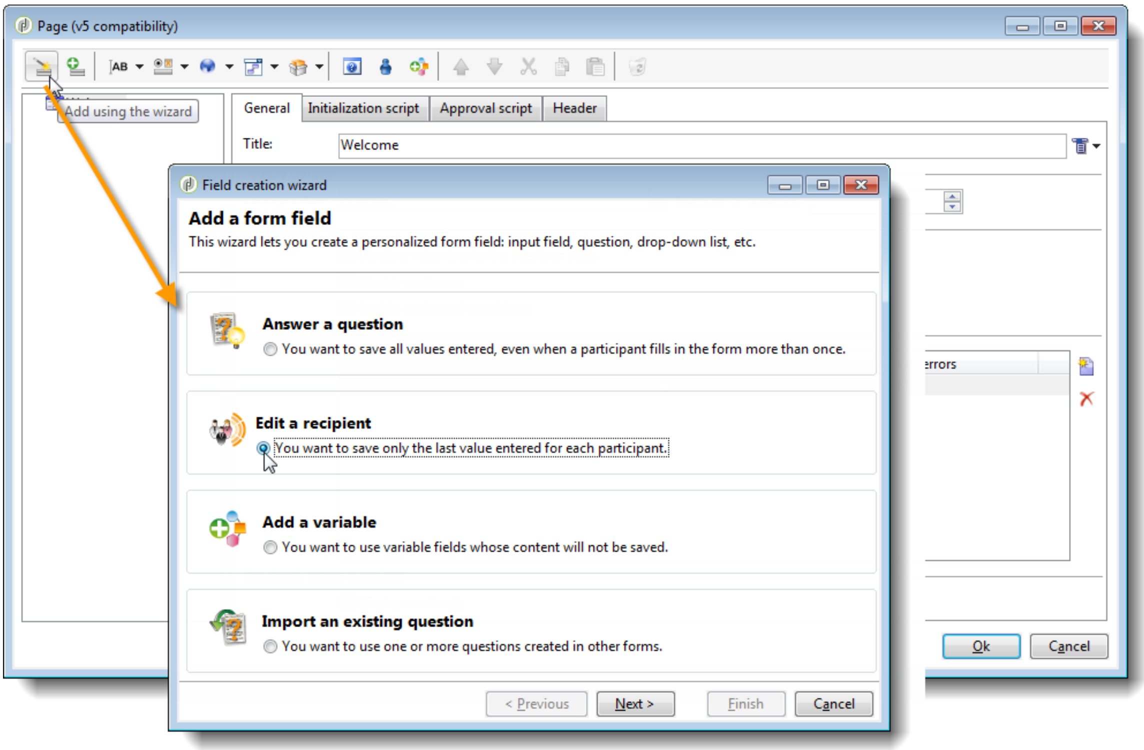
Note:

In the following example, we are using a **Page (v5 compatibility)** type page. This type of page is accessed via the advanced menu of the **Edit** tab.

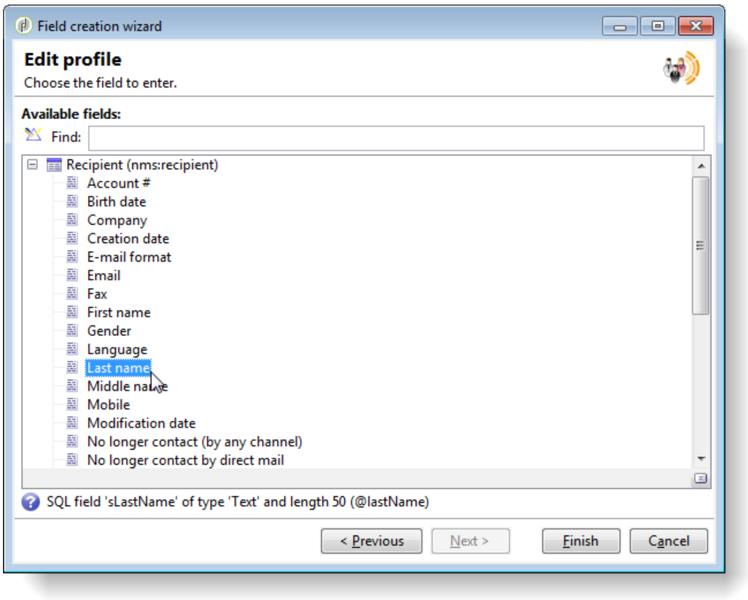


- Adding input fields

  To create the content of the page, you must edit it: to do this, double-click the **Page** object. Click the first icon in the toolbar to open the field creation wizard. To create an entry field for the user name to be stored in the matching field of the recipient's profile, select **Edit a recipient**.

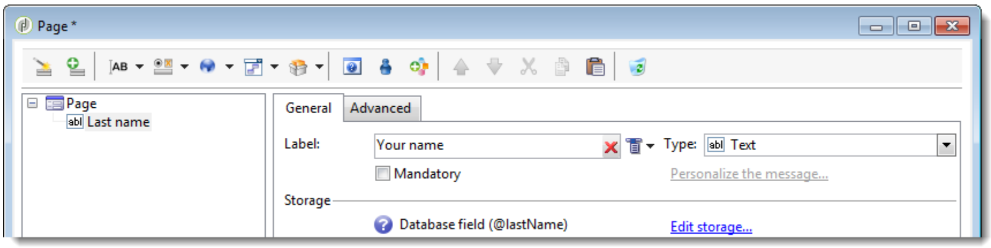


Click the **Next** button to select the field for data storage in the database. In this case, the 'Last name' field.



Click **Finish** to confirm field creation.

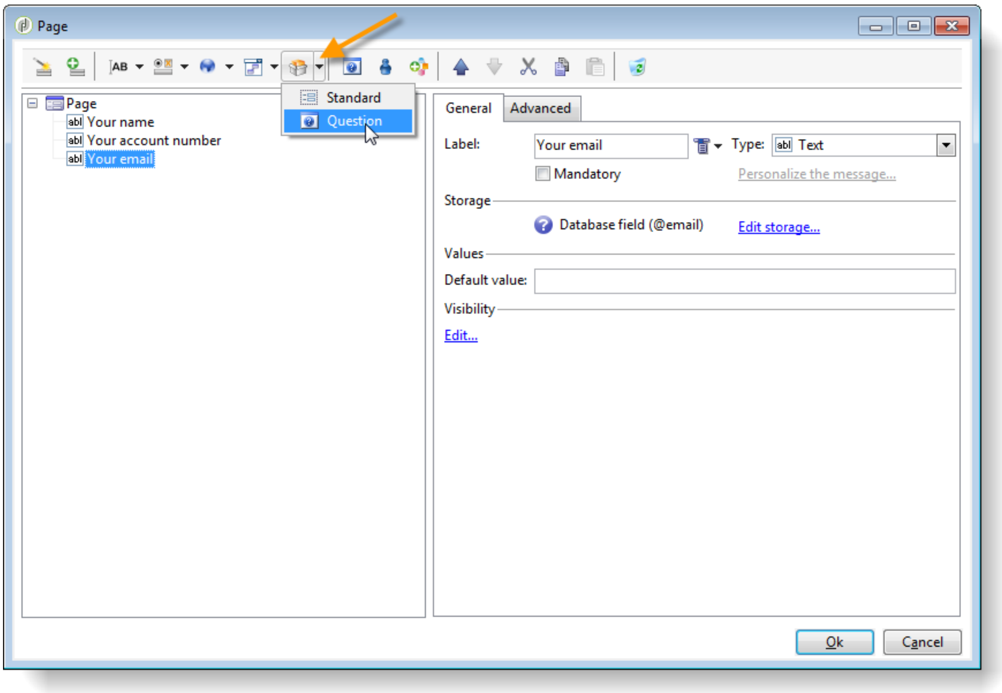
By default, when the information is stored in a field that already exists in the database, the field takes on the name of the selected field, i.e. 'Last name' in this example. You can modify this label as shown below:



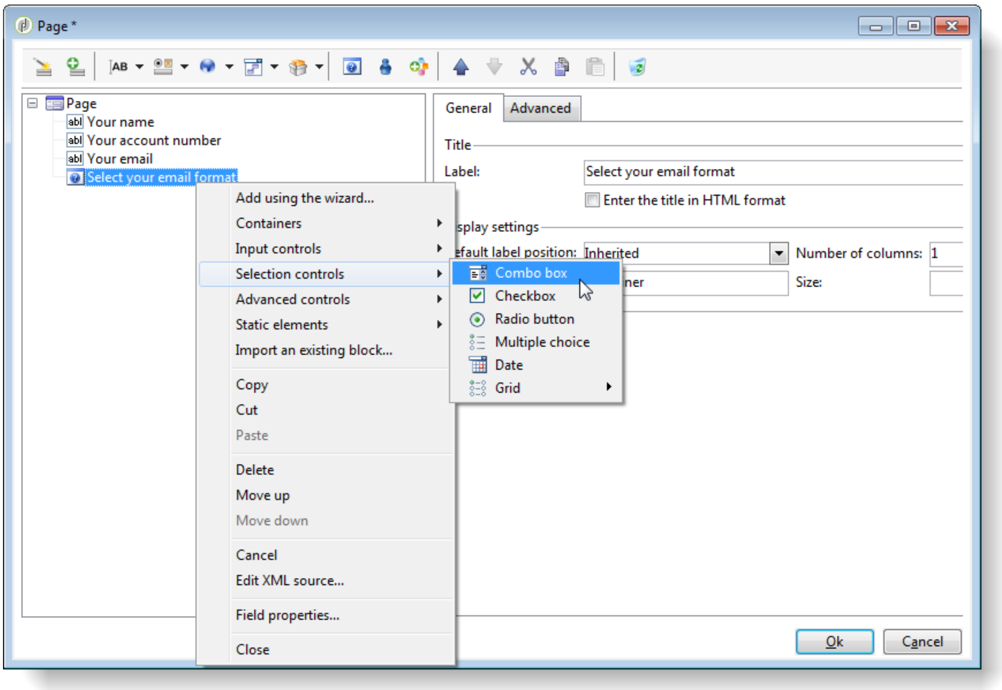
Now create an entry field for the user account number. Repeat the operation and select the 'account No.' field.

Apply the same procedure to add a field for the user to enter an email address.

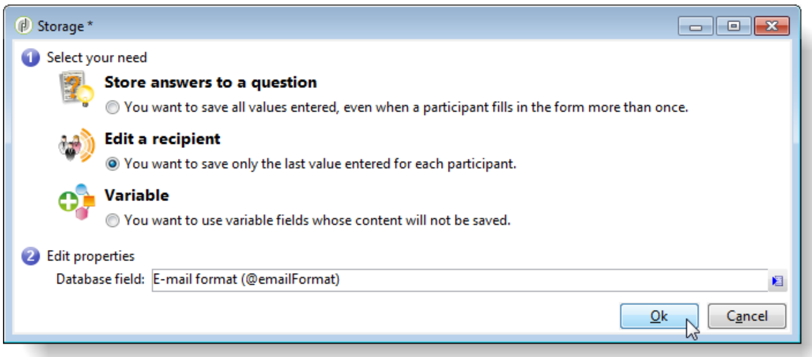
- To create a question, right-click the last element in the tree, and select **Containers** > **Question**, or click the **Containers** icon and select **Question**.



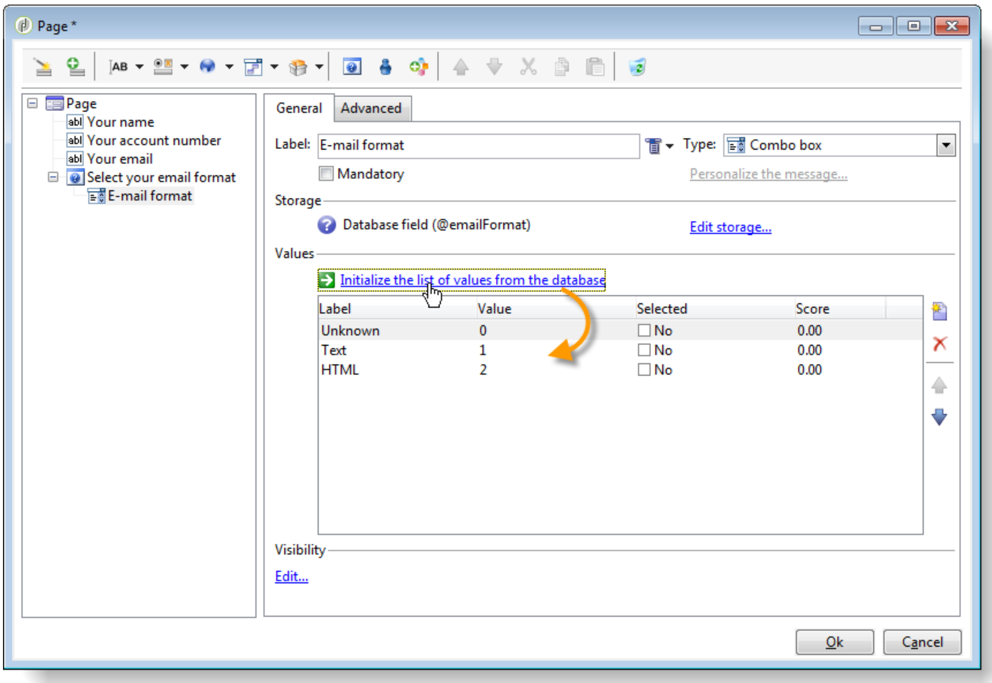
Enter the label of the question and insert the answer field(s) as a sub-branch of the question. To do this, the node linked to the question must be selected when you create the answer field. Add a **drop-down listx** using the **Selection controls** icon or by right-clicking, as shown below:



Select a storage space: select an enumeration field to retrieve the values automatically (the email format in this case).



In the **General** tab, click the **Initialize the list of values from the database** link: the table of values is entered automatically.

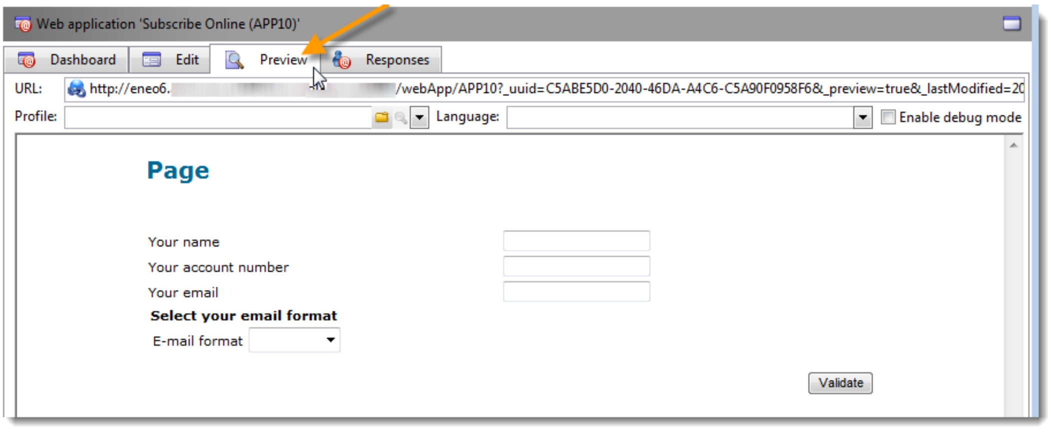


Click **OK** to close the editor, and **Save** to save changes.

Note:

For each field or question, you can adapt the page layout to suit your needs, thanks to the options in the **Advanced** tab. The layout of survey screens is detailed in the Creating a Web form [page 46].

In the detail screen, click the **Preview** tab to view the rendering of the survey you have just created.

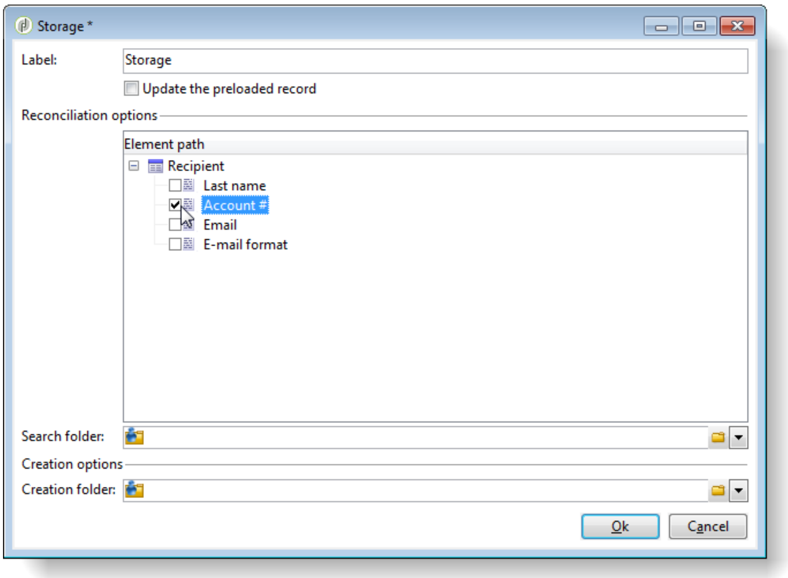


Step 5 - Storing data

The storage box lets you save the user responses in the database. You must select a reconciliation key to identify the profiles already in the database.

To do this, edit the box and select the field that will be used as a reconciliation key when the data is stored.

In the example below, when saving (confirmation) takes place, if a profile is saved in the database with the same account number as the one input in the form, the profile will be updated. If the profile does not exist, it will be created.



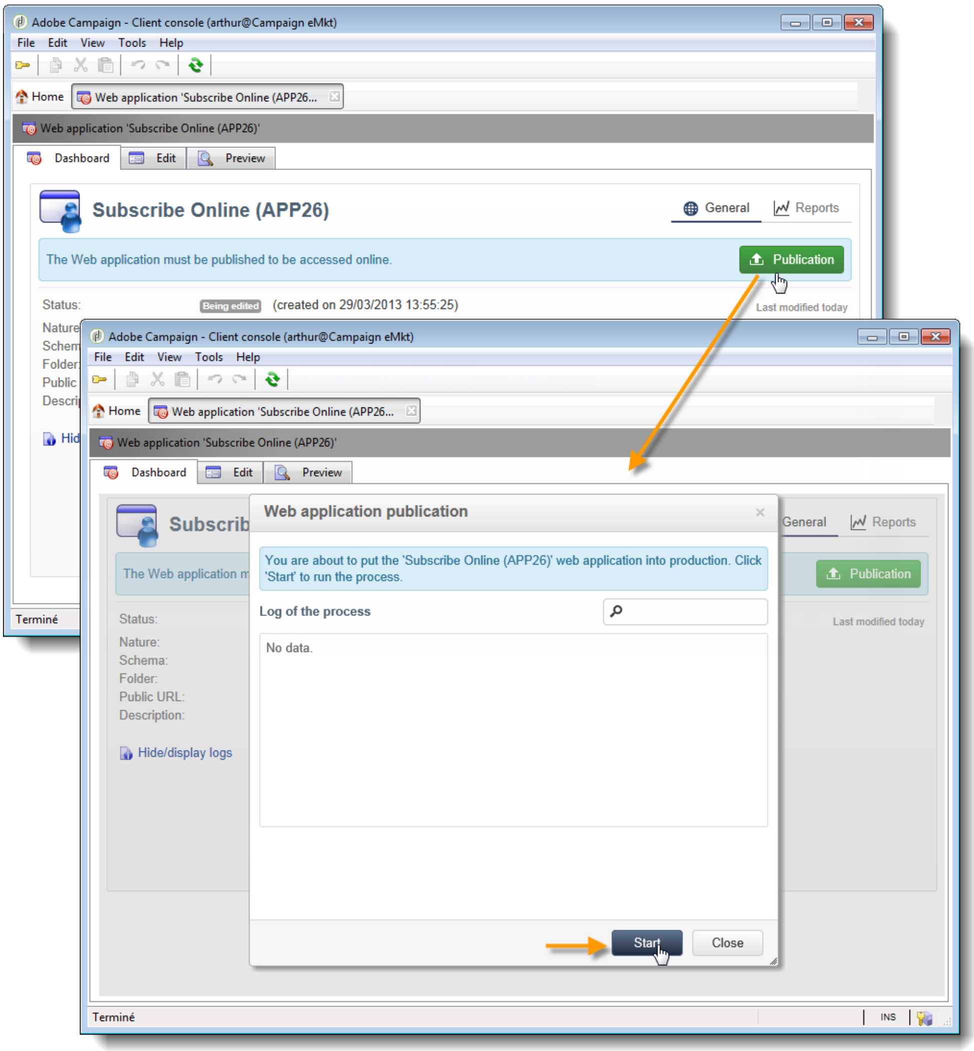
Click **OK** to confirm, then click **Save** to save the survey

Step 6 - Publishing the pages

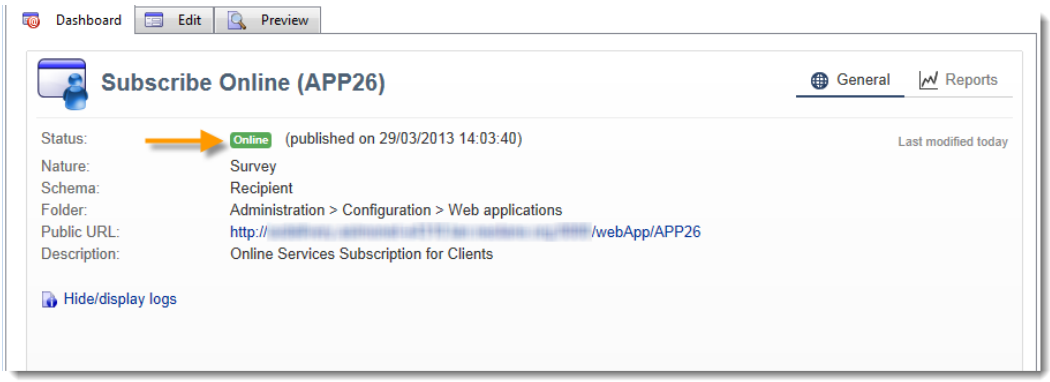
For users to be able to access the HTML pages, the application must be made available. It must no longer be at the editing stage, but in production. To put a survey in production, you must publish it. To do this:

- Click the **Publish** button located above the survey dashboard.

- Click **Start** to launch publication and close the wizard.

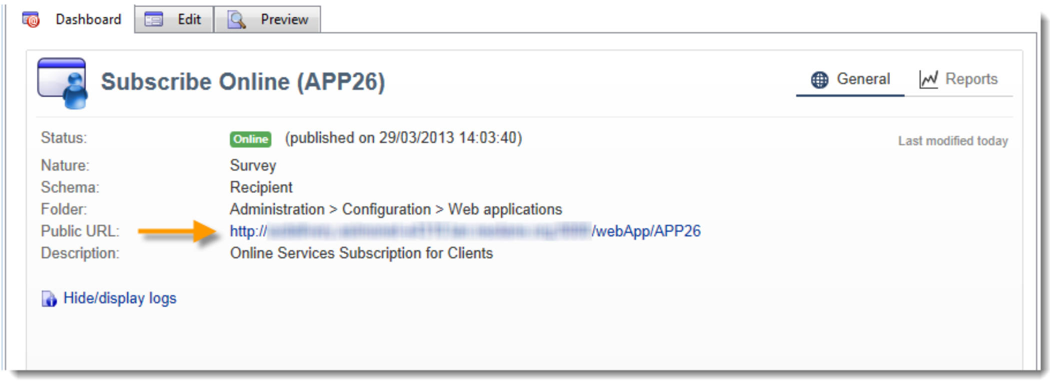


The status of the survey changes to: **Online**.



Step 7 - Delivering the online survey

Once it is in production, the survey is accessible on the server and you can deliver it. The URL for accessing the survey is displayed on the dashboard.



To deliver the survey, you can send a message containing an access link to the target population, or place the survey access URL on a web page, for example.

You can then monitor user responses via reports and logs. See Response tracking [page 215].

Warning:

The public URL includes the internal name of the survey. When the internal name is modified, the URL is updated automatically: all links to the survey must also be updated.

If deliveries containing the link to the form have already been sent, this link will no longer work.

Building a survey

Note:

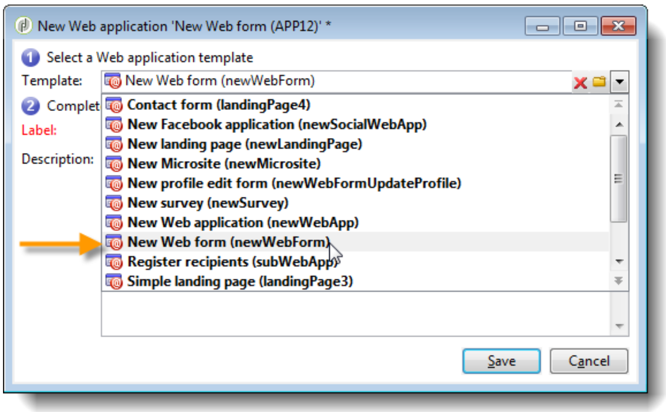
The steps for creating a Web form using Adobe Campaign are detailed in Web Forms [page 45]. Only survey-specific configurations will be detailed hereafter.

Creating a new survey

This chapter details the designing of a **Survey** type form using Adobe Campaign, as well as the available options and configurations. Adobe Campaign lets you make this survey available to users and collect and archive answers in the database.

Web forms are accessed via the **Resources** > **Online** > **Web applications** node of the tree. To create a survey, click the **New** button above the list of applications, or right-click the list and choose **New**.

Select the survey template (**newSurvey** by default).



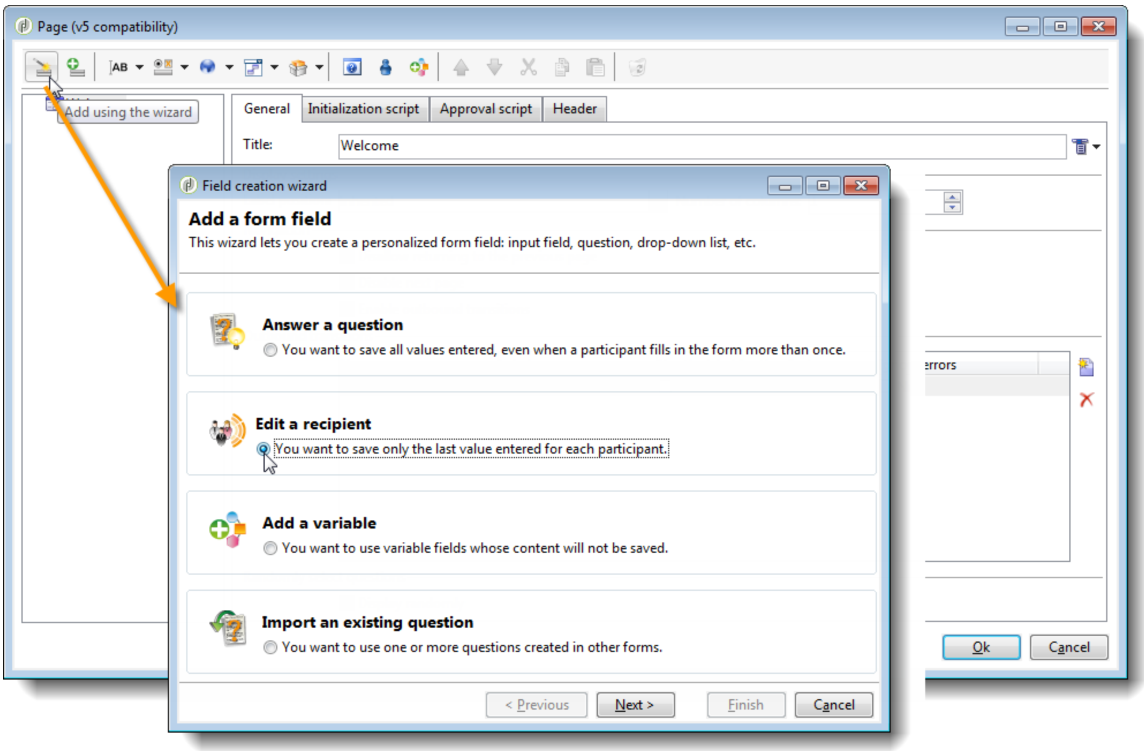
The pages of the form are created using a special editor that lets you define and configure (text) input fields, selection fields (lists, checkboxes, etc.) and static elements (images, HTML content, etc.). They can be collected in "containers" and laid out according to requirements (see Questions [page 202]).

Note:

For more on how to define content and create screen layouts for a Web form, refer to Overview [page 46].

Adding fields

The fields in a form enable users to enter information and select options. For each page in the form, they are created via the first button in the toolbar using the **Add using the wizard** menu.



Note:

You can also use a right-click and insert an input zone. By default, the zone is inserted at the end of the selected tree. Use the arrows in the toolbar to move it.

Types of fields

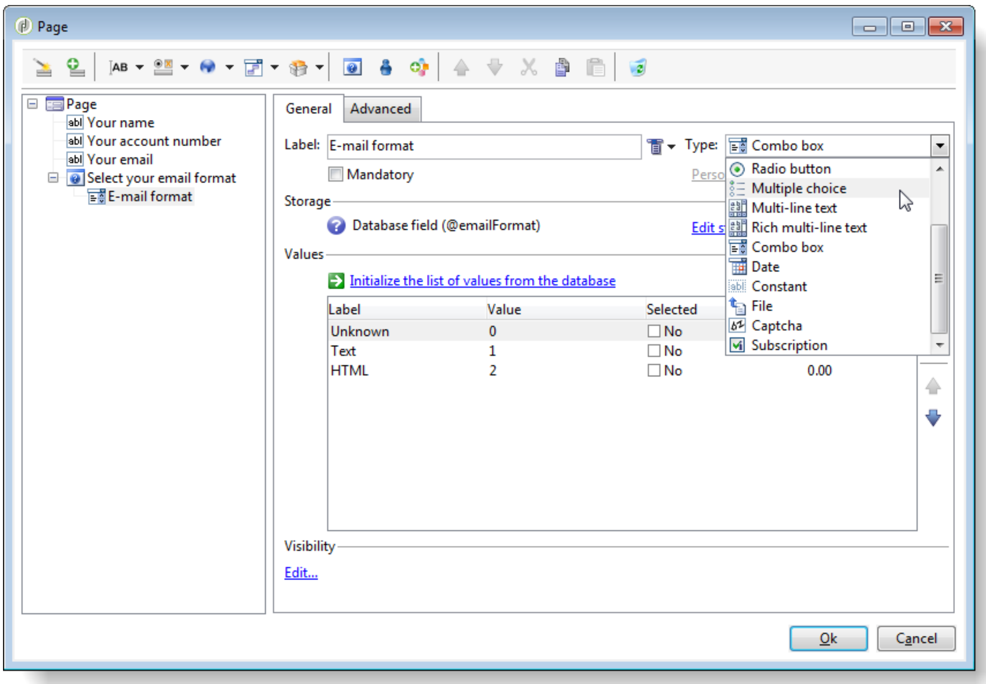
When you add a field to a survey you need to select its type. The following options are available:

1. Answer to a question: this option lets you declare a new field (known as 'archived field') to store answers. In this case, all values collected are saved, not only the last one. This storage mode is only available in **Surveys**. Refer to Survey answer storage [page 204].
2. Field editing: this option lets you select a field in the database. In this case, user answers will be stored in this field. For each user, only the last value saved is kept, and added to the profile data.
3. Local variable: this option lets you create a setup so that information is not stored in the database. Local variables can be declared upstream. You can also add them directly when creating the field.
4. Field import: this option lets you import existing fields created in other surveys.

Note:

Standard storage modes and field imports are detailed in Response storage fields [page 106].

The nature of the field to add (drop-down list, text field, checkboxes, etc.) adapts to the storage mode selected. You can change it using the **Type** field of the **General** tab, but make sure to remain consistent with the data type.



The various types of available fields are detailed in Overview [page 46].

Survey-specific elements

Specificities linked to survey fields are detailed below.

Multiple choice

Multiple choice

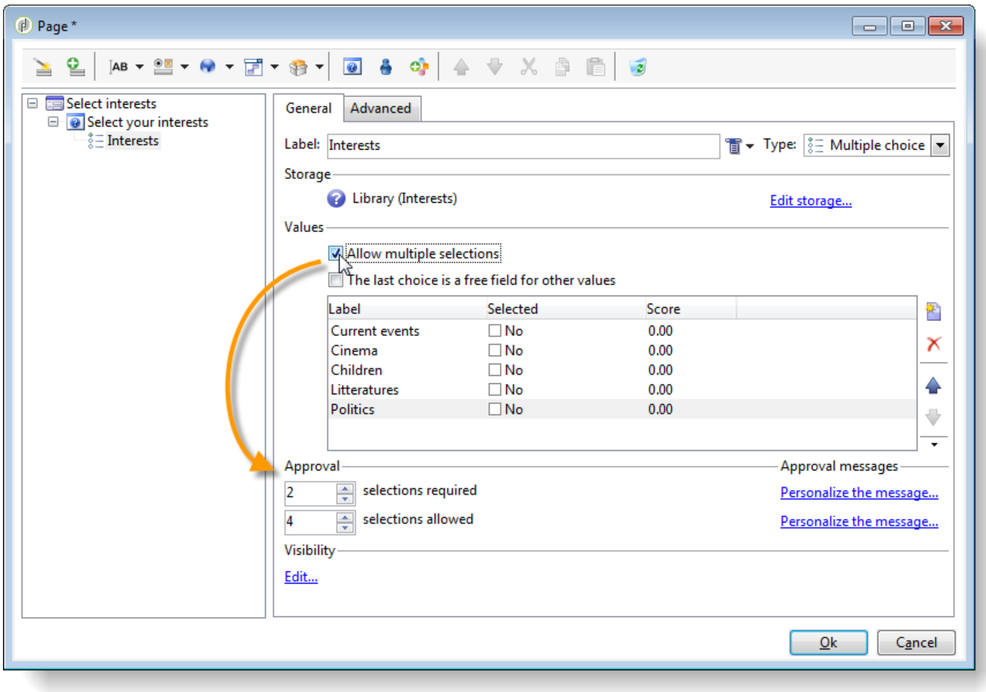
For **Multiple choice** type controls, you can define a minimum and maximum number of selections. For example, this option enables you to force the selection to at least **2** values and at most **4** values from the available options:

If the number of selections is too big or too small, the appropriate message is displayed.

Note:

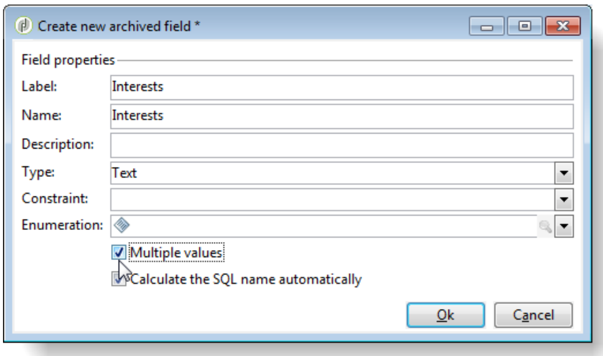
In this case, the options are selected using checkboxes. When only one option is possible, radio buttons are used.

The corresponding configuration is as follows:



Warning:

- This functionality is only available for **Survey** type forms.
  In addition, the storage location for this input field must be a **Multiple values** type **archived field**:



- This option isn't compatible with random question display. For more on this, refer to Random display of questions [page 204].

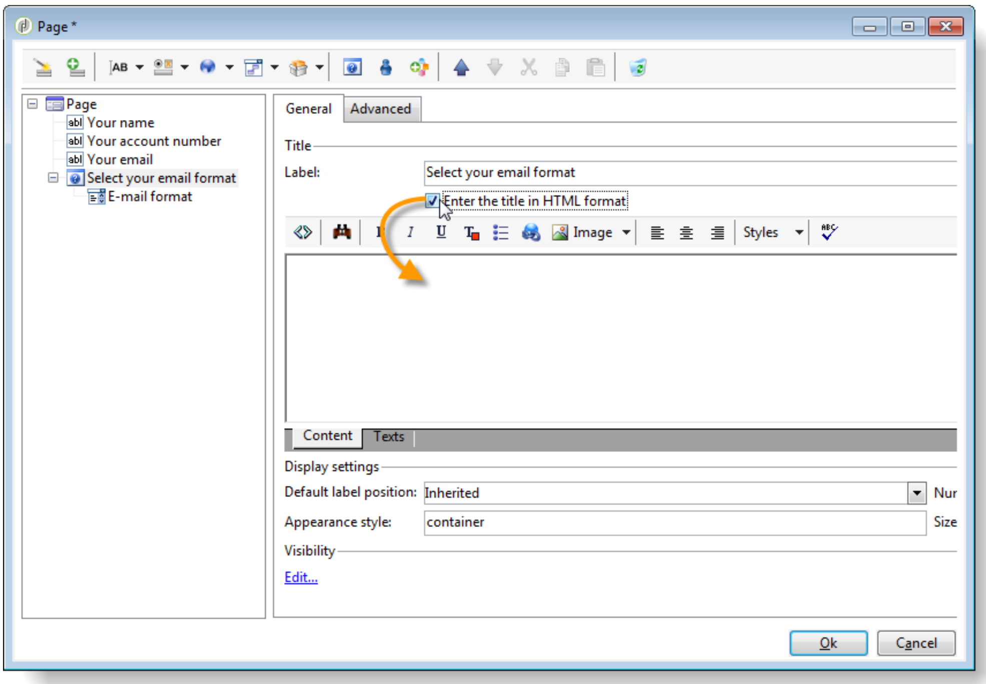
Questions

There are two types of containers: standard and question. Standard containers are used to configure page layout and conditional display in a page. They are detailed in Creating a Web form [page 46].

Use a **Question** container to add a question to the page and to insert the possible answers below in the hierarchy. User responses to questions placed in this type of container can be analyzed in reports.

Warning:

Never insert a **Question** container below another **Question** container in the hierarchy.

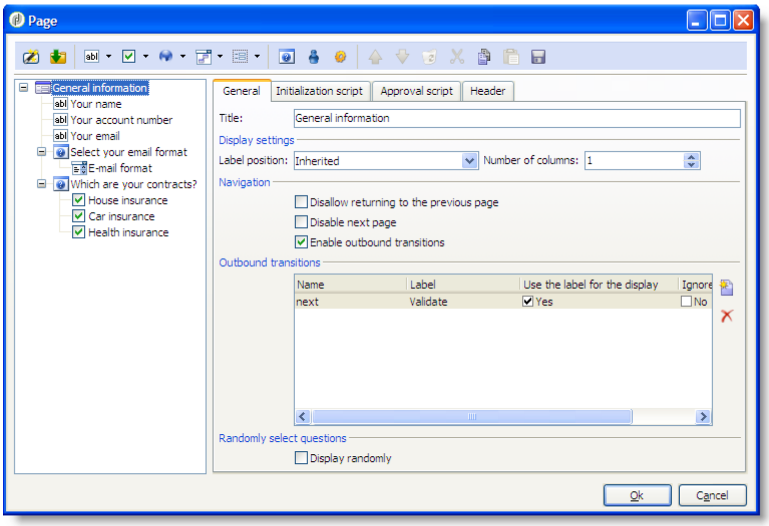


The label of the question is entered in the label field. In this case, the style from the form's style sheet will be applied. Select the **Enter the title in HTML format** option to personalize it. This will give you access to the HTML editor.

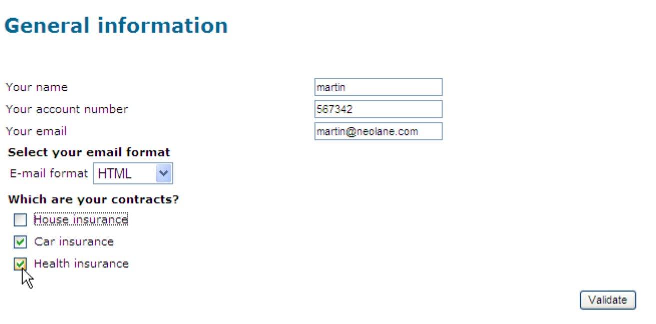
Note:

Refer to Creating a Web form [page 46] for more on using the HTML editor.

For example:



In the example above, the rendering will be as follows:

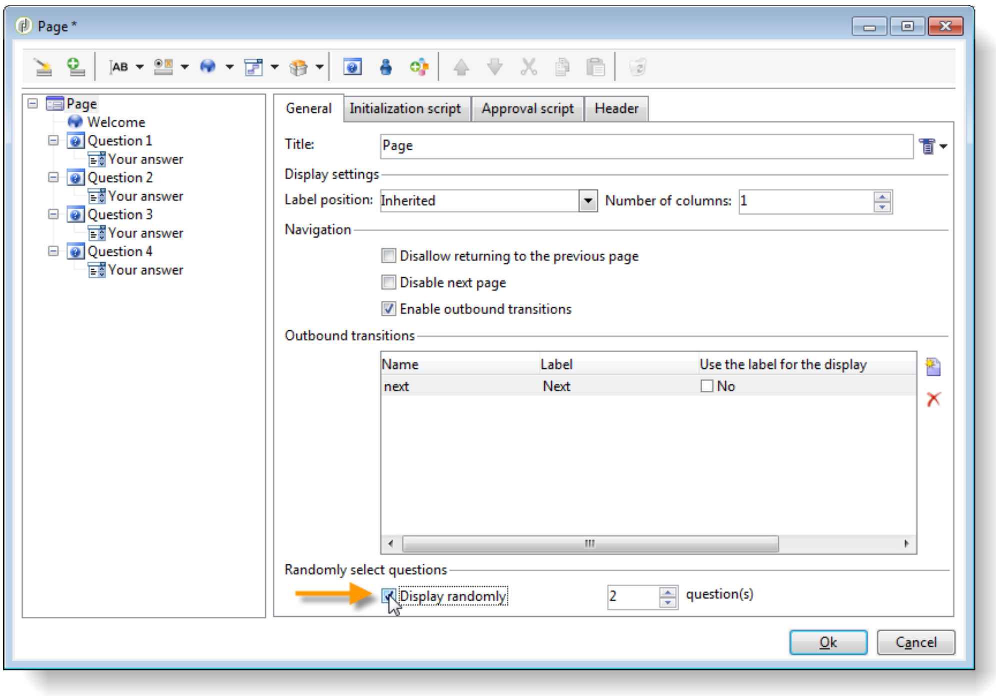


Note:

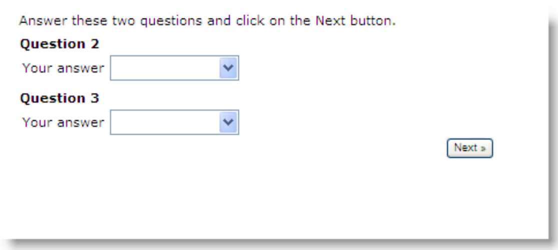
Every question has a **Question** type container.

Random display of questions

Enabling the random drawing of questions allows Adobe Campaign to select the questions to display at random. You can then specify the number of questions to be displayed in the page, in the field located at the bottom of the configuration window.



The rendering will look like this:



When the page is refreshed, the questions displayed are not the same.

Warning:

When you display a question randomly (**Display randomly** option checked on the page), be careful not to use multiple choice questions for which one or more selections are mandatory.

Managing answers

Storing and using collected answers

Survey answer storage

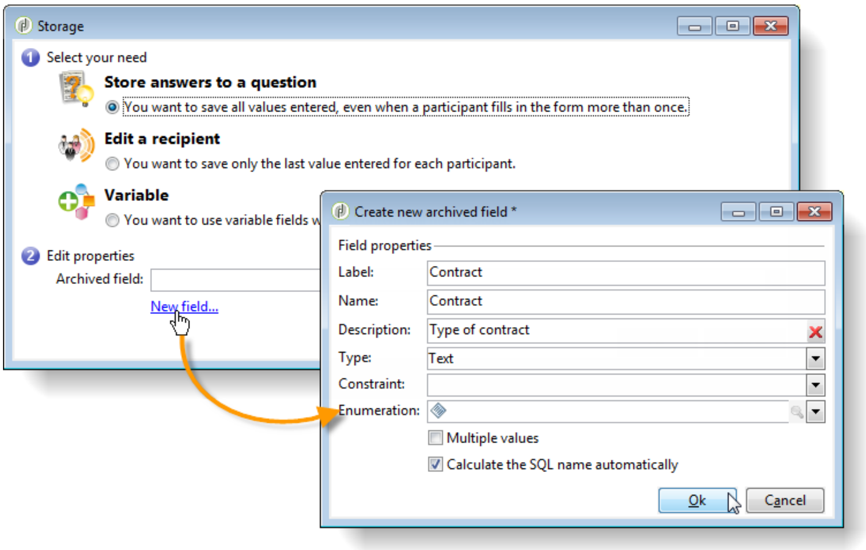
In addition to the standard storage modes common to all Web forms in Adobe Campaign (database field and local variable), surveys enable the dynamic extension of the data model using archived fields.

Warning:

This option is available for **Survey** type web applications only. It is not offered for other types of Web forms.

Storing in an archived field

It is easy to extend the data template by adding new storage spaces to save the responses provided in surveys. To do this, select the **Store answers to a question** option when creating the input field. Click the **New field...** link and give its properties:



- Enter the label and name of the field.
- Select the type of field: Text, Boolean, Integer or decimal number, Date, etc.

  The type of field selected involves a control of the data when responses are entered by users.

  For **text** fields, you can:

  - Add a constraint by selecting it from the drop-down list. There are two types of constraints:

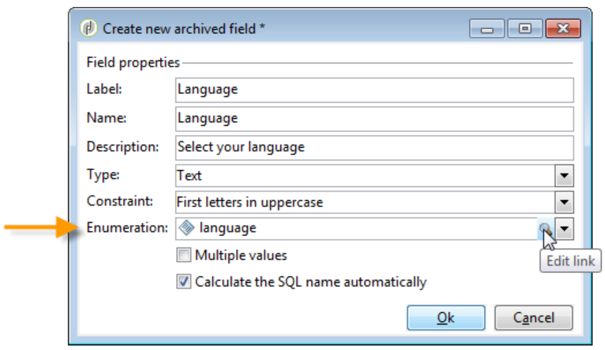
    1. Character case

       The information entered can be stored in the field in the following formats: all uppercase, all lowercase, or with initial uppercase. This constraint does not require the user to enter the data in the selected format, but the content entered in the field will be converted when saved.

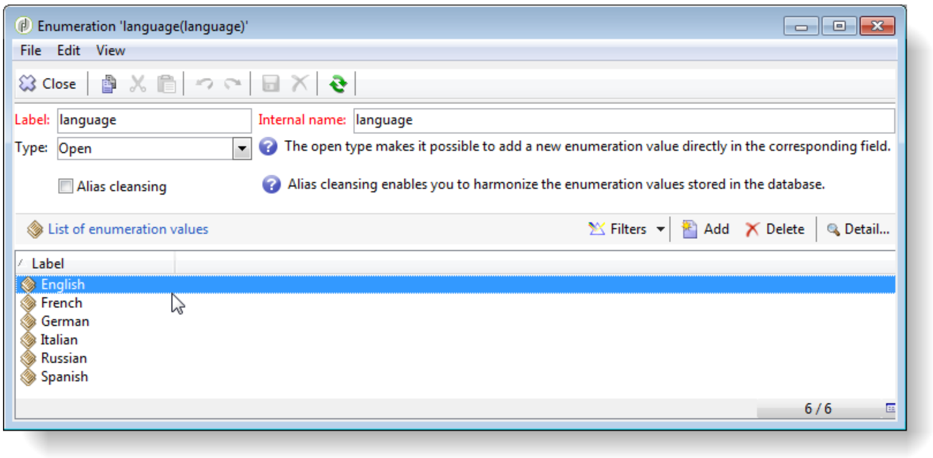
    2. Data format

  - Link an existing enumeration to the field. If this field is used in a list, the values of the enumeration can be re-initialized automatically in the table of values using the link above the list of values.

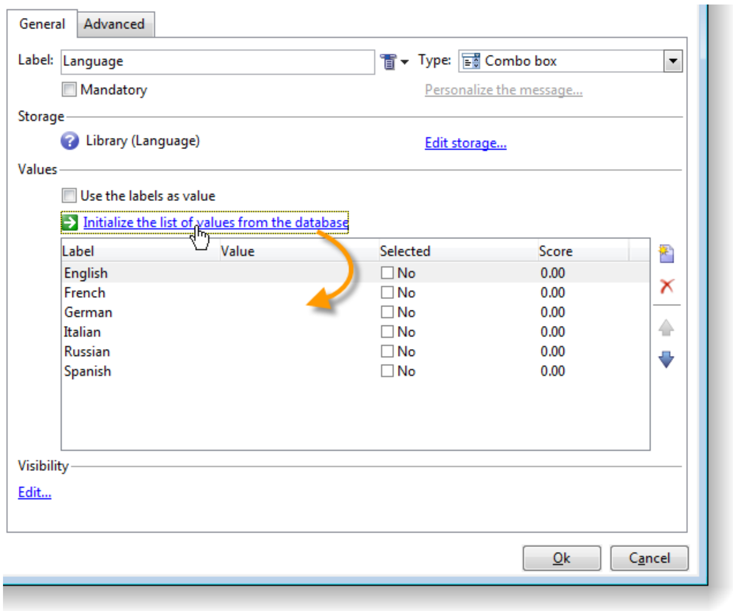
    For example, you can create a drop-down list for the user to select his or her native language. The corresponding archived field can be associated with the **language** enumeration which contains a list of languages:



The **Edit link** icon located to the right of the field lets you edit the content of this enumeration:



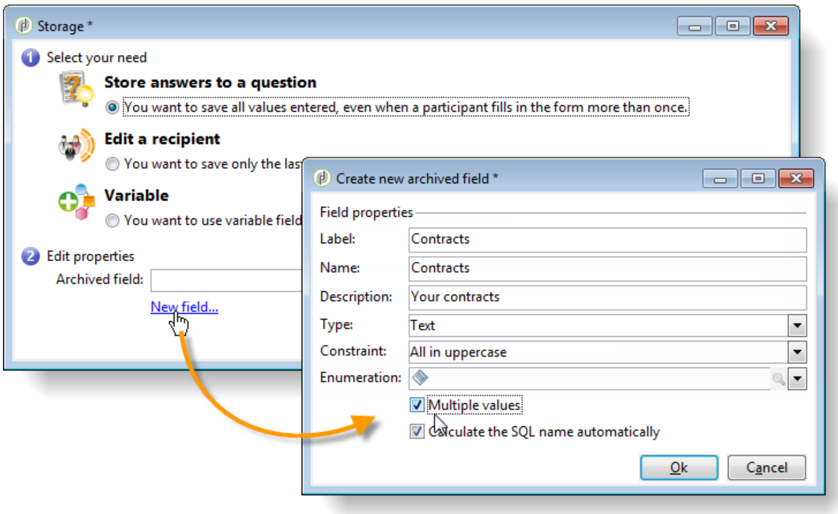
In the **General** tab of the field, the **Initialize the list of values from the database** link lets you automatically enter the list of labels offered.



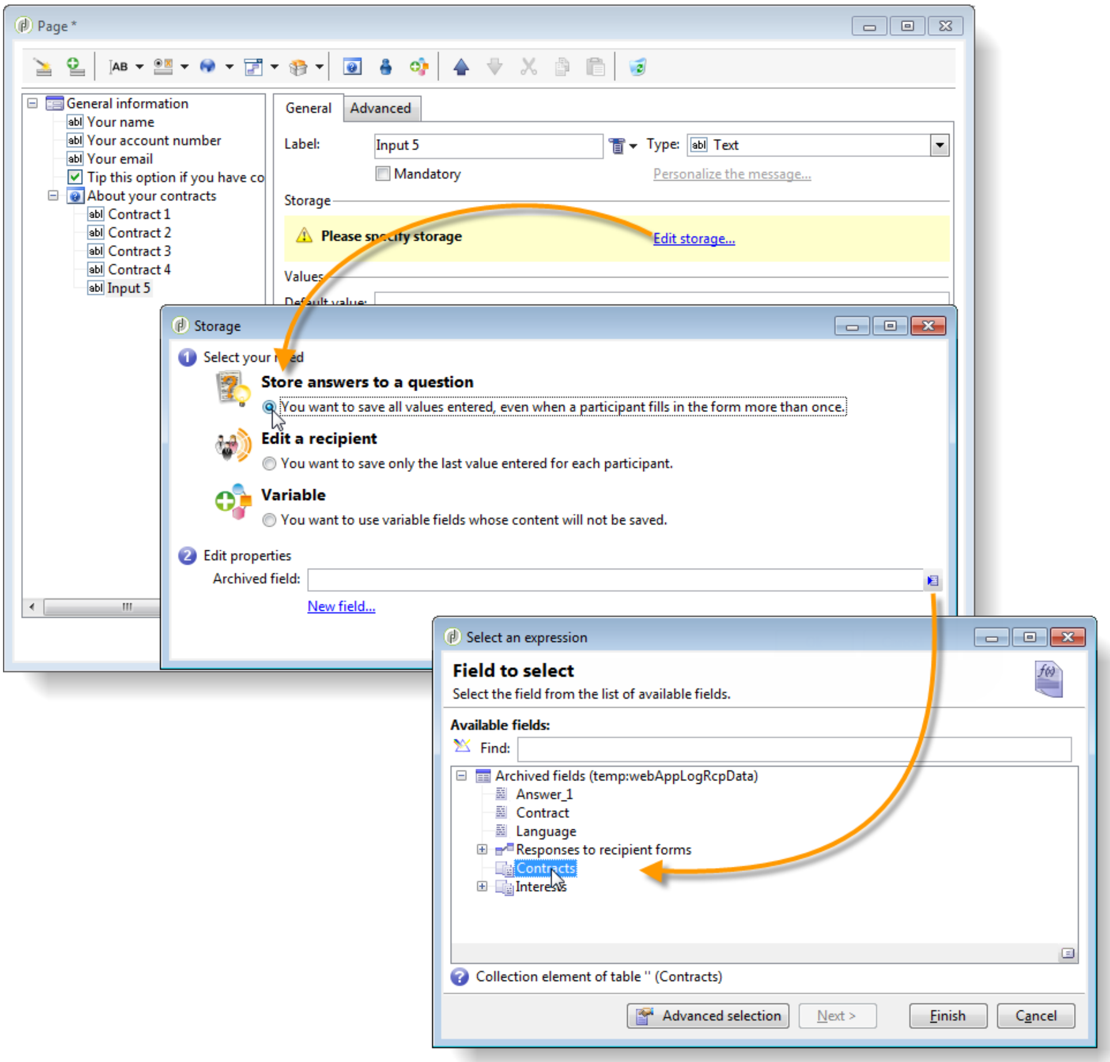
- **Example**: storing a recipient's contracts in one field

  To store different types of contracts in one field, create a **Text** input field and select the **Store answers to a question** option.

Click the **New field...** link and enter the field properties. Select the **Multiple values** option to enable several values to be stored.

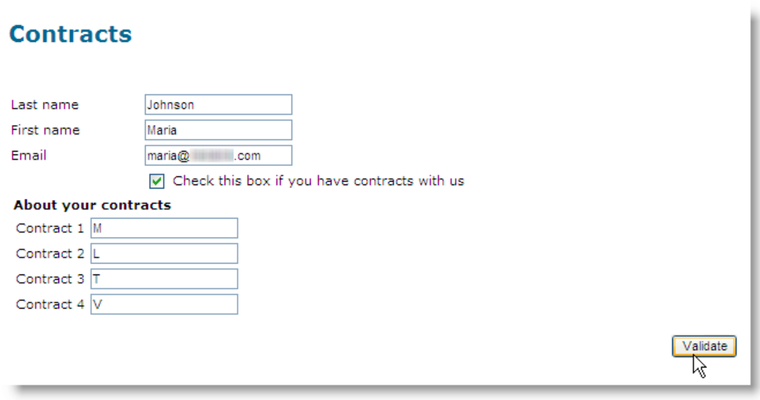


Create entry fields for the other contracts, and store the data in the same archived field.



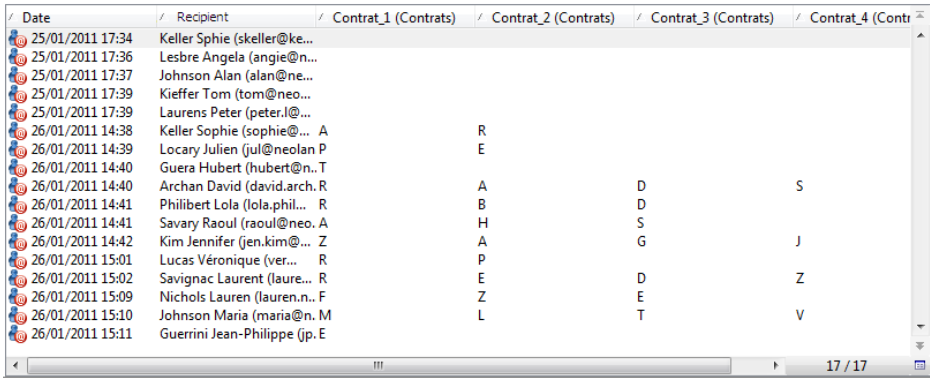
When users approve the survey, their answers will be stored in the **Contracts** field.

In our example, for the following answers:



The respondent's profile will contain the four contracts entered.

They can be viewed in the **Answers** tab of the survey by displaying the relevant columns.



Date	Recipient	Contrat_1 (Contrats)	Contrat_2 (Contrats)	Contrat_3 (Contrats)	Contrat_4 (Contr
25/01/2011 17:34	Keller Sphie (skeller@ke...				
25/01/2011 17:36	Lesbre Angela (angie@n...				
25/01/2011 17:37	Johnson Alan (alan@ne...				
25/01/2011 17:39	Kieffer Tom (tom@neo...				
25/01/2011 17:39	Laurens Peter (peter.l@...				
26/01/2011 14:38	Keller Sophie (sophie@...	A	R		
26/01/2011 14:39	Locary Julien (jul@neolan	P	E		
26/01/2011 14:40	Guera Hubert (hubert@n..	T			
26/01/2011 14:40	Archan David (david.arch.	R	A	D	S
26/01/2011 14:41	Philibert Lola (lola.phil...	R	B	D	
26/01/2011 14:41	Savary Raoul (raoul@neo.	A	H	S	
26/01/2011 14:42	Kim Jennifer (jen.kim@...	Z	A	G	J
26/01/2011 15:01	Lucas Véronique (ver...	R	P		
26/01/2011 15:02	Savignac Laurent (laure...	R	E	D	Z
26/01/2011 15:09	Nichols Lauren (lauren.n..	F	Z	E	
26/01/2011 15:10	Johnson Maria (maria@n.	M	L	T	V
26/01/2011 15:11	Guerrini Jean-Philippe (jp.	E			

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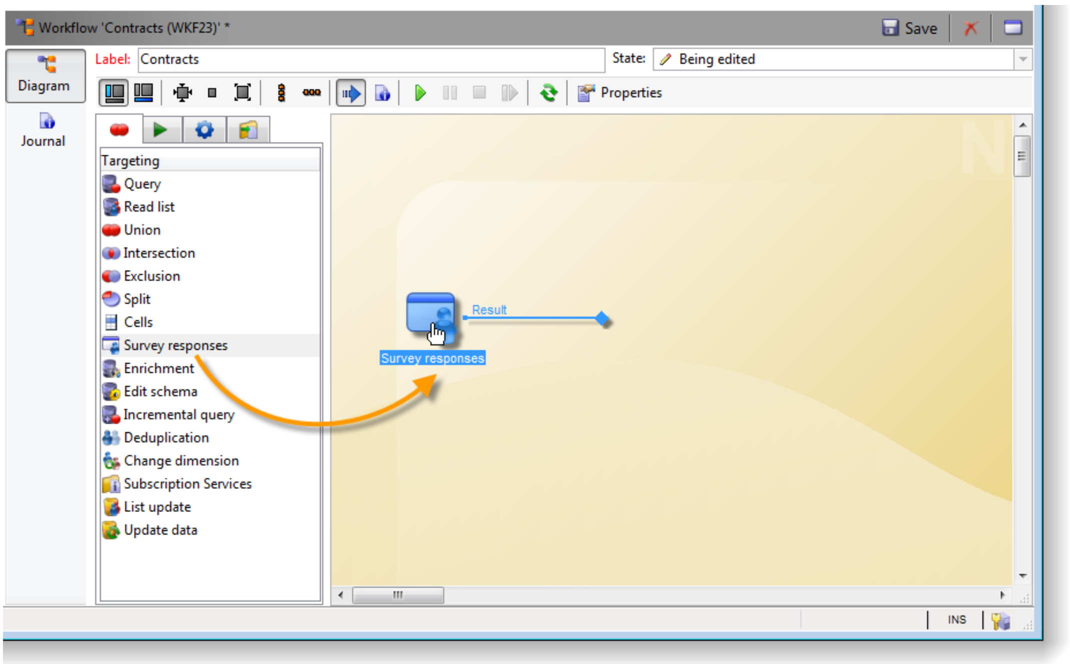
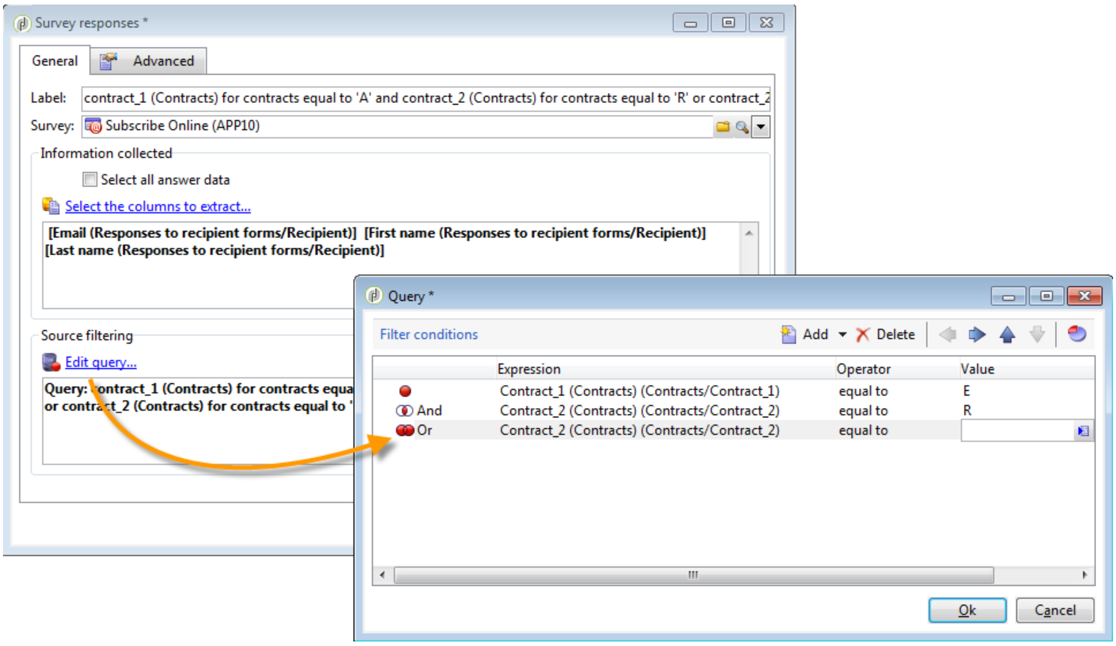
You can also filter recipients based on answers to display only the users that interest you. To do this, create a targeting workflow and use the **Survey responses** box.



Create your query based on the profiles you want to recover. In the following example, the query lets you select profiles with at least two contracts, including an A type contract.



For each form, the answers provided can be used in fields or labels. Use the following syntax for content stored in an archived field:

```
<%= ctx.webAppLogRcpData.name of the archived field %
```

Note:

For other types of fields, the syntax is detailed in Creating queries.

Storage settings

It's possible to archive answers to surveys in XML format. This lets you save a raw copy of the answers collected, which can be useful in case of excessive standardization of the data in an itemized list (for more on this, refer to Standardizing data [page 224]).

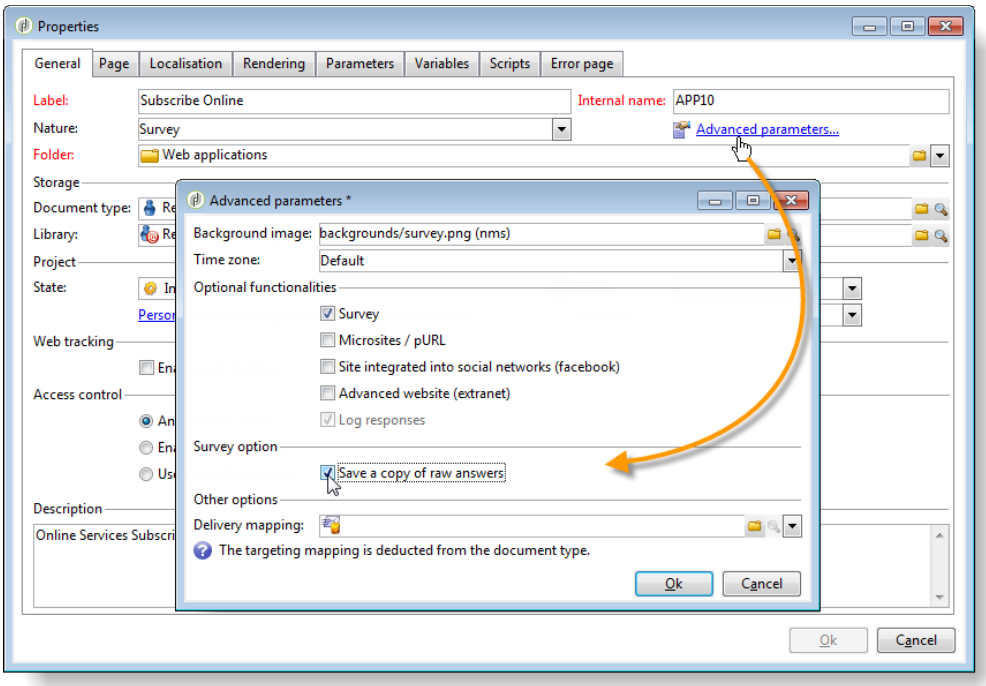
Warning:

Archiving raw responses greatly increases the storage space required. Use this option with care.

To do this:

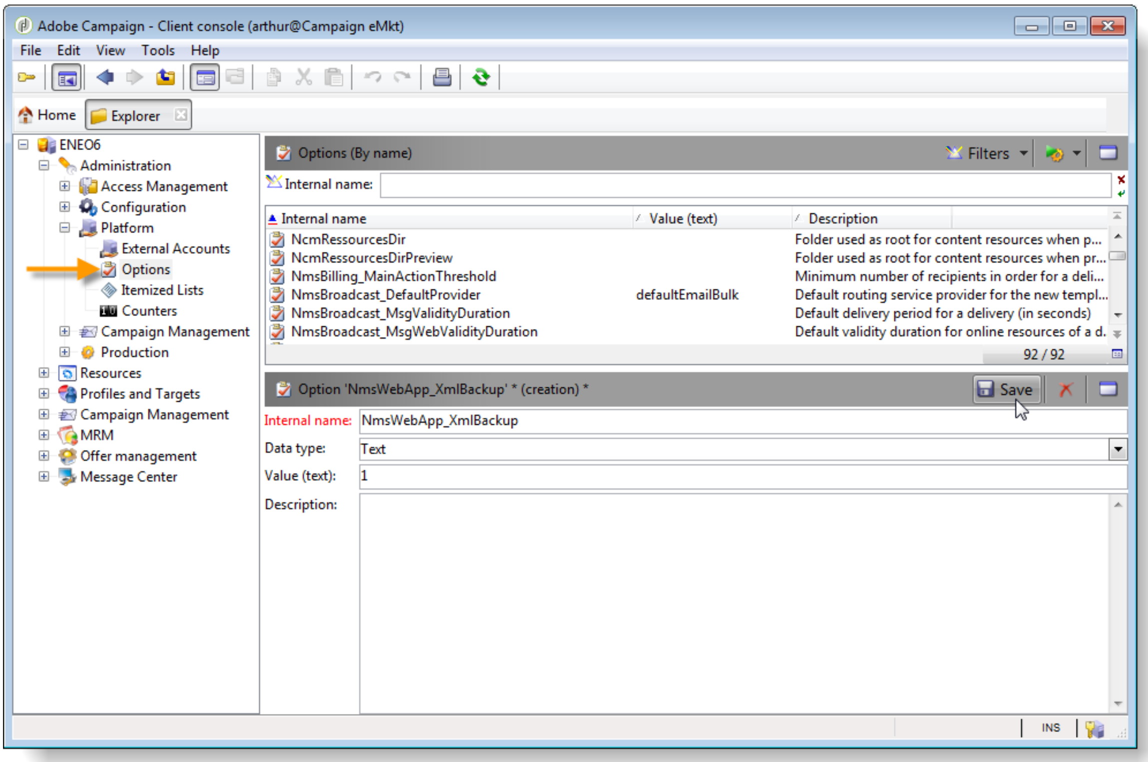
- Edit the survey properties via the **Properties** button of the **Edit** tab.

- Click the **Advanced parameters** link and check the **Save a copy of raw answers** option.



Note:

You can enable it by default for all surveys (this option is applied when the survey is published). To do this, create the **NmsWebApp_XmlBackup** option and assign value **1** to it, as shown below:

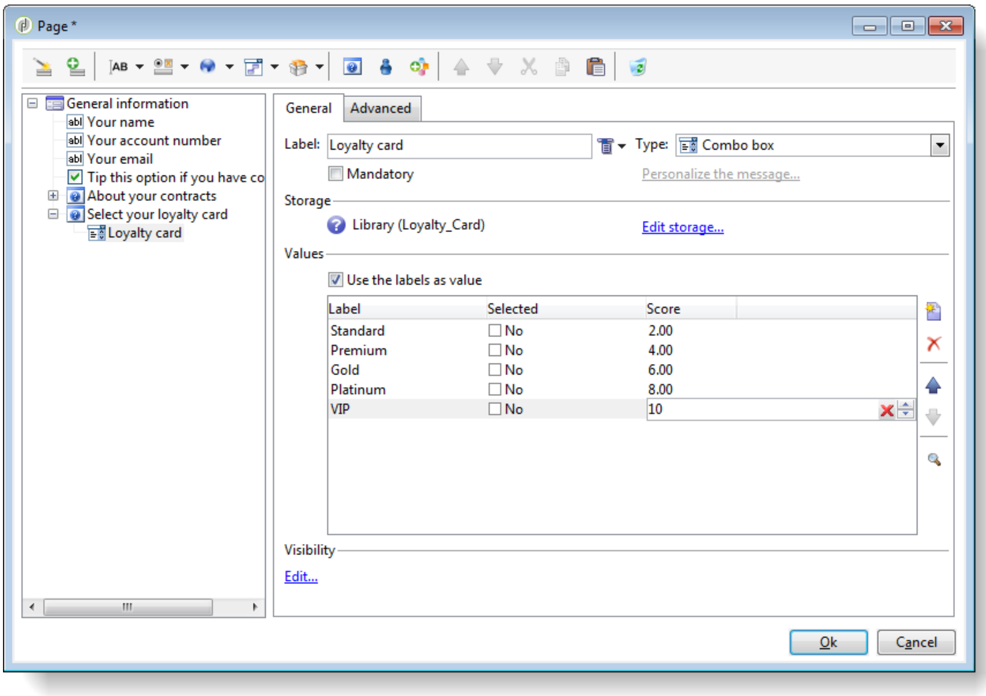


Score management

Warning:

Score management is available for **Surveys** only.

You can assign a score to the options offered in the pages of the form. They may only be linked to closed questions: checkbox, value from a drop-down list, subscription, etc.



The scores are accumulated and saved on the server side when the page is confirmed, i.e. when the user clicks the **Next** or **Finish** button.

Note:

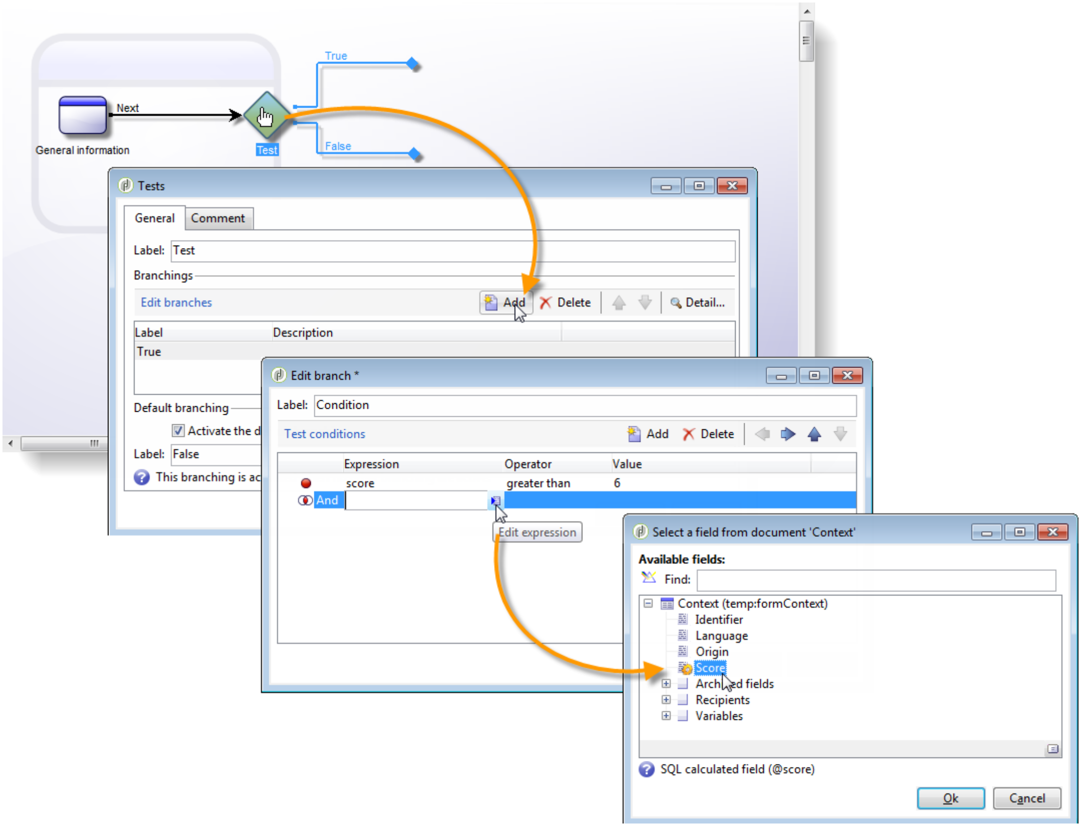
You can use positive or negative, integer or non-integer values.

Scores can be used in tests or scripts.

Warning:

Scores cannot be used in the visibility conditions for fields which are on the same page. However, they can be used in subsequent pages.

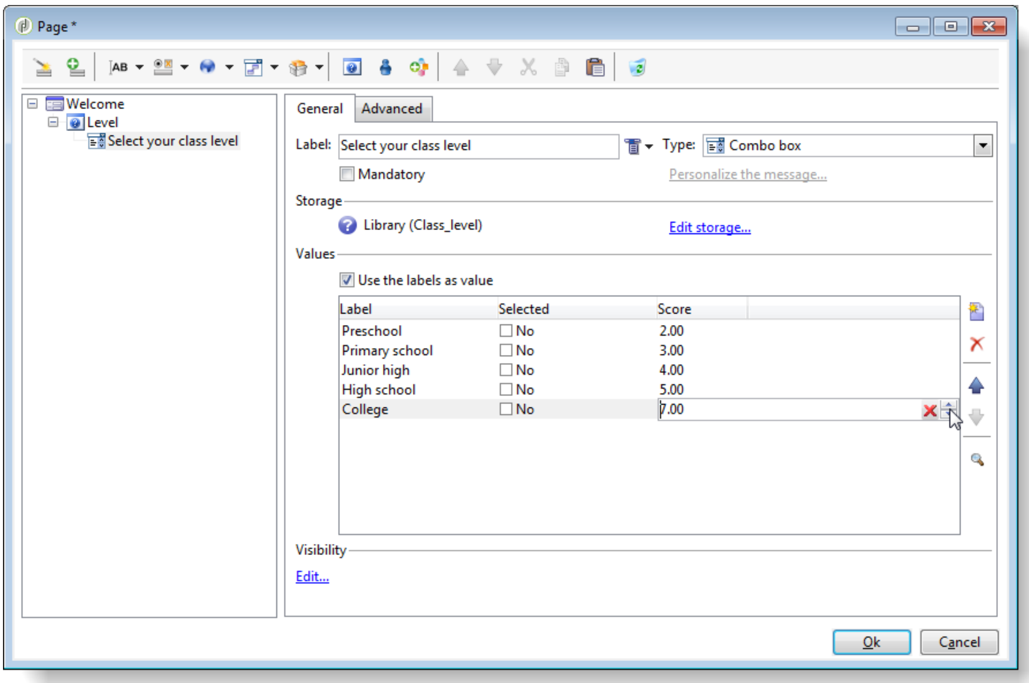
- To use scores in tests, use the **Score** field in the test calculation formula, as shown below:



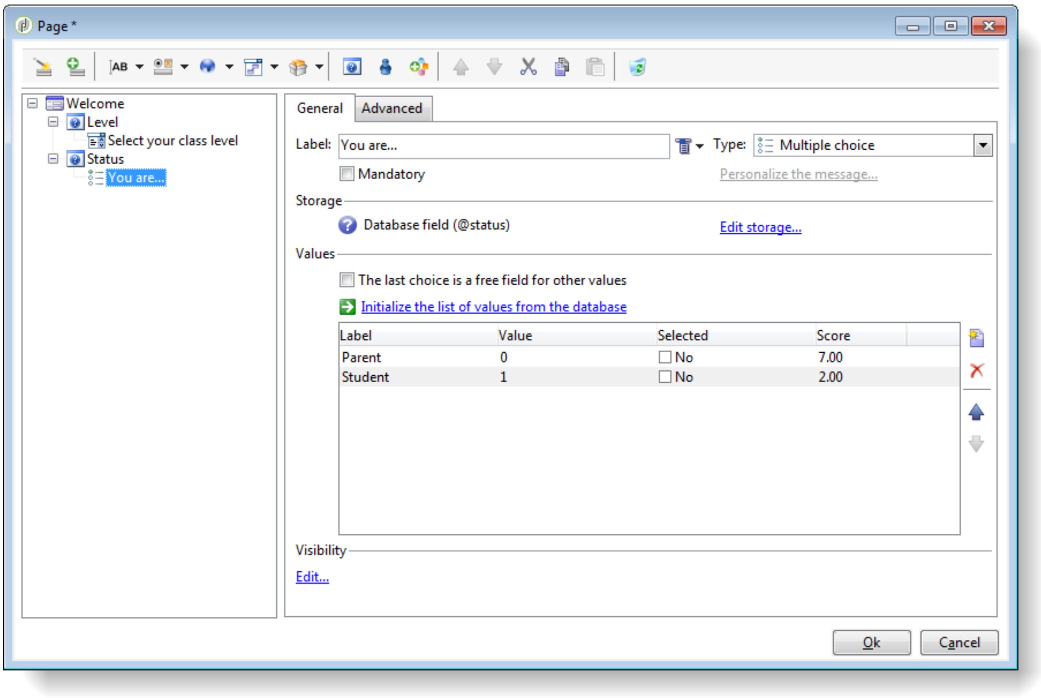
- You can use the score in a script.

Example: calculate a score and use it as a condition for the display of the next page:

- In a survey, the next page lets you assign different scores to users depending on the value selected in the drop-down list:

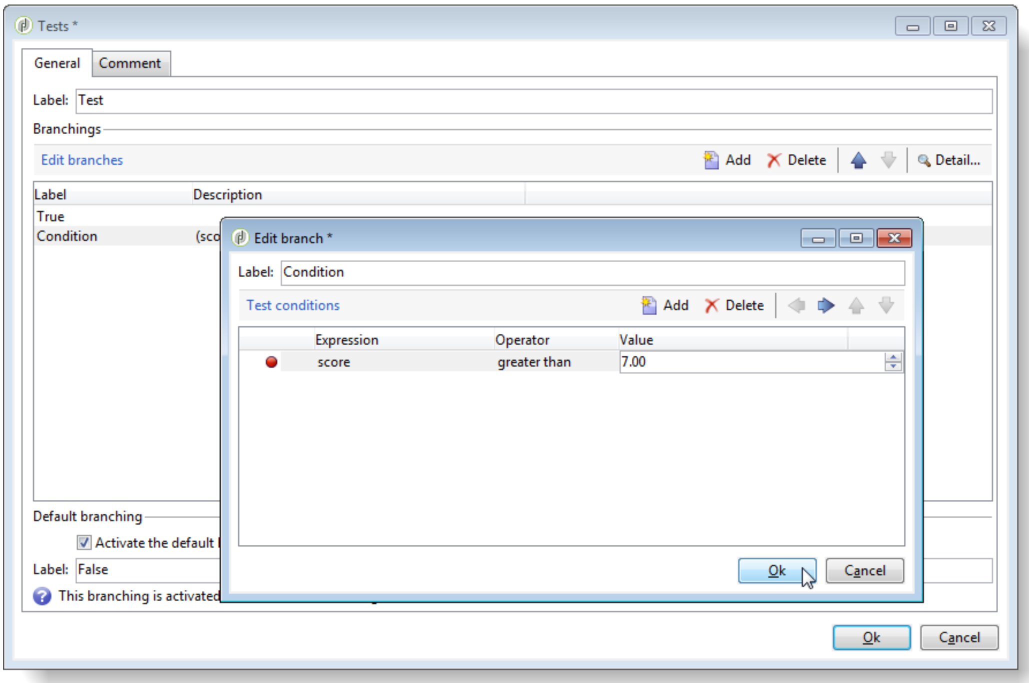


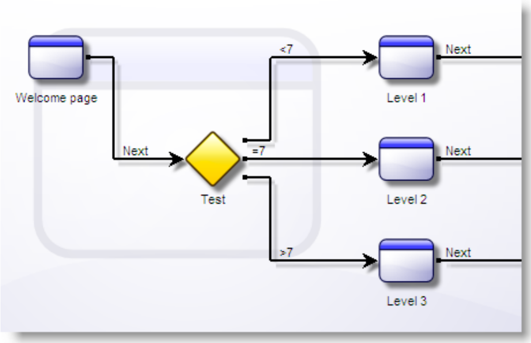
- You can combine this score with a second value, depending on the selected option:



- When the user clicks the **Next** button, the two values are added up.

- Conditions can be applied for the page to be displayed according to the score. This is configured as follows:





Delivering a survey

Delivery, tracking and use of collected data

Once the form has been created, configured and published, you can deliver it and track the user responses.

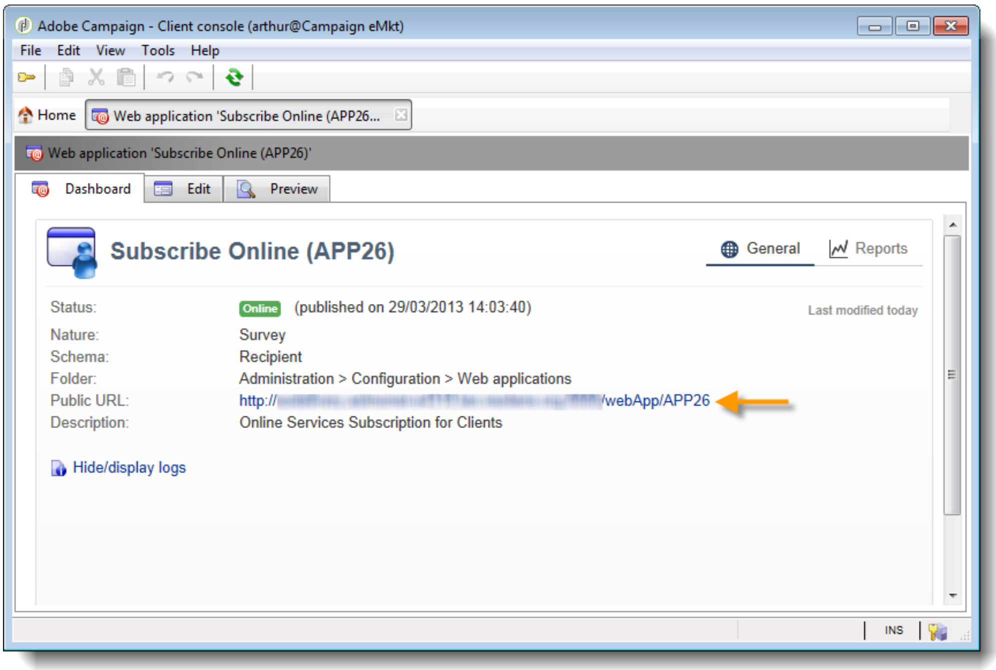
Note:

The life cycle of a survey in Adobe Campaign as well as its publishing and delivery modes are similar to those of Web forms: these are detailed in Overview [page 46].

Survey dashboard

Each survey has its own dashboard which lets you view its status, description, public URL and availability schedule. It also lets you view the available reports. For more on this, refer to Reports on surveys [page 216].

The survey's public URL is shown on the dashboard:

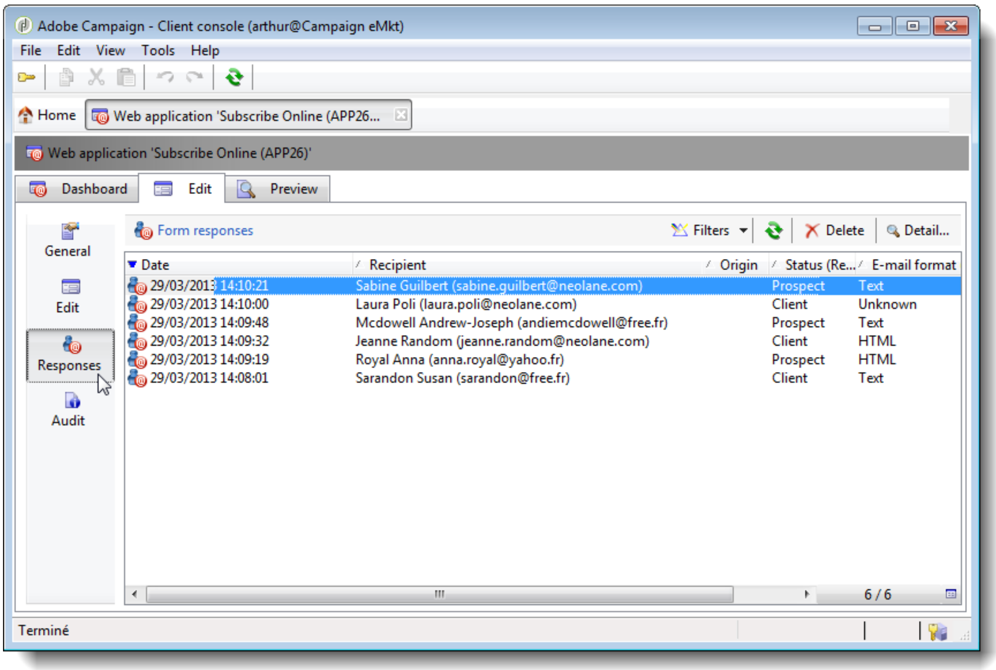


Response tracking

You can track the responses to the survey in logs and reports.

Survey logs

For each survey delivered, you can track the responses in the **Logs** tab. This tab displays the list of users who have completed the survey and their origin:



Double-click a line to display the survey form as filled in by the respondent. You can browse the survey in full and access the answers in full. These can be exported in an external file. For more on this, refer to Exporting answers [page 218].

Note:

The origin is indicated in the survey URL by adding the following characters:

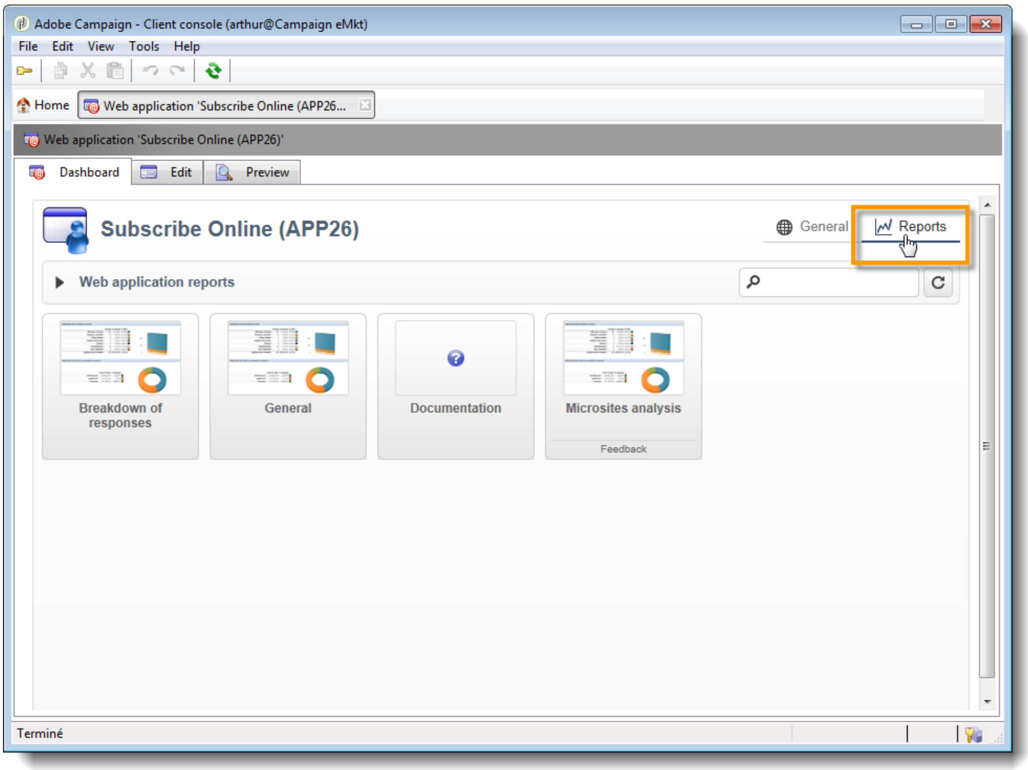
```
?origin=xxx
```

while the survey is being edited, its URL contains the parameter __**uuid**, which indicates that it is in a test phase and not yet online. When you access the survey via this URL, the records created are not taken into account in the tracking (reports). The origin is forced to the value **Adobe Campaign**.

For more on URL parameters, refer to URL parameters [page 129].

Reports on surveys

The dashboard tab lets you access survey reports. Click a report name to view it.



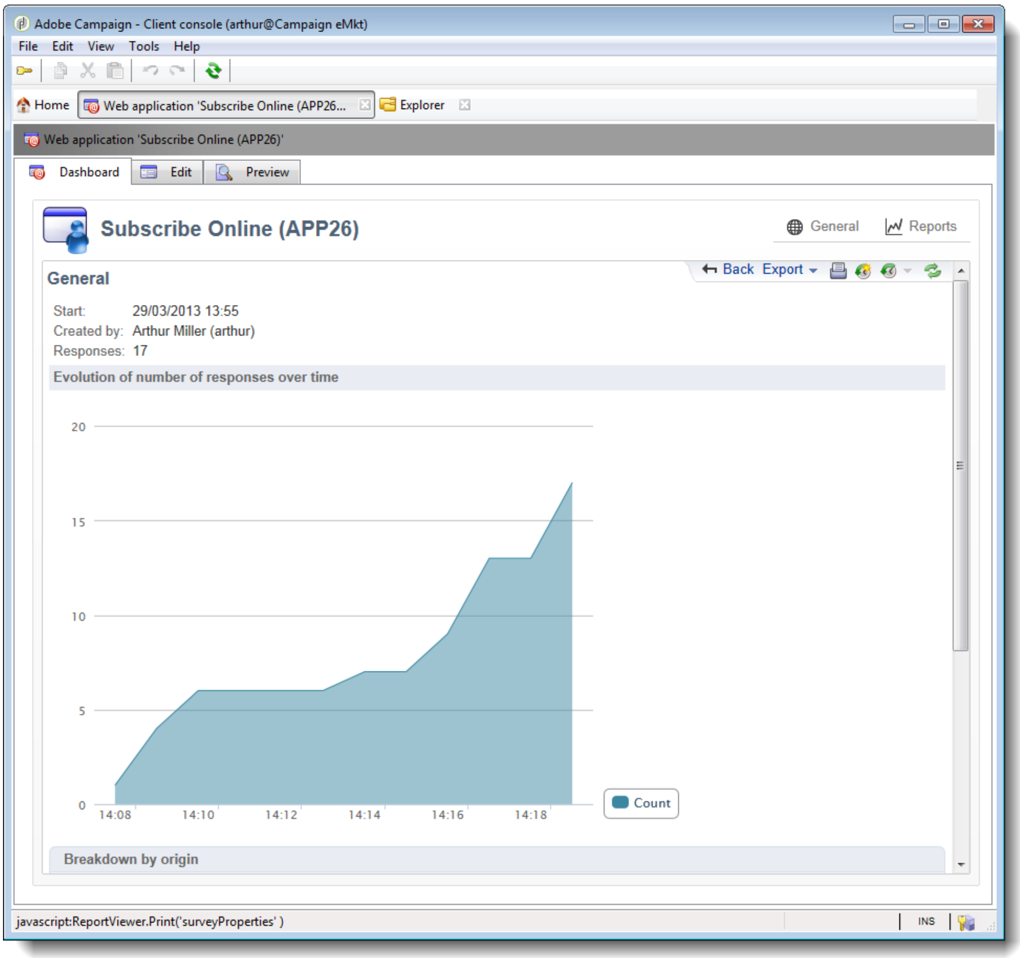
The structure of the survey is visible in the **Documentation** report.

Two other reports on Web surveys are available in the **Reports** tab of the surveys: **General** and **Breakdown of responses**.

- General

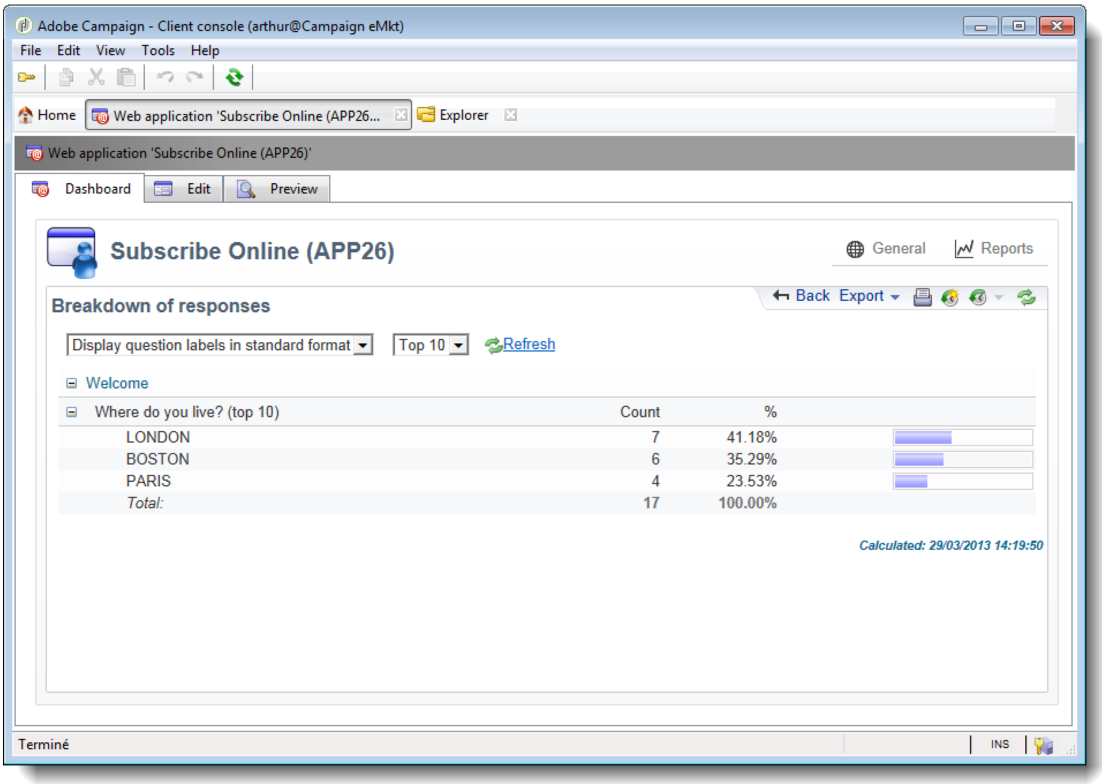
  This report contains general information on the survey: how the number of responses changes over time and the distribution by origin and language.

Example of a general report:



- Breakdown of responses

This report shows the breakdown of responses for each question. This breakdown is only available for answers given to fields stored in **Question** type containers. It is valid only for selection controls (no breakdown on text fields, for example).



Exporting answers

Answers to a survey can be exported in an external file to be processed later. There are two ways of doing this:

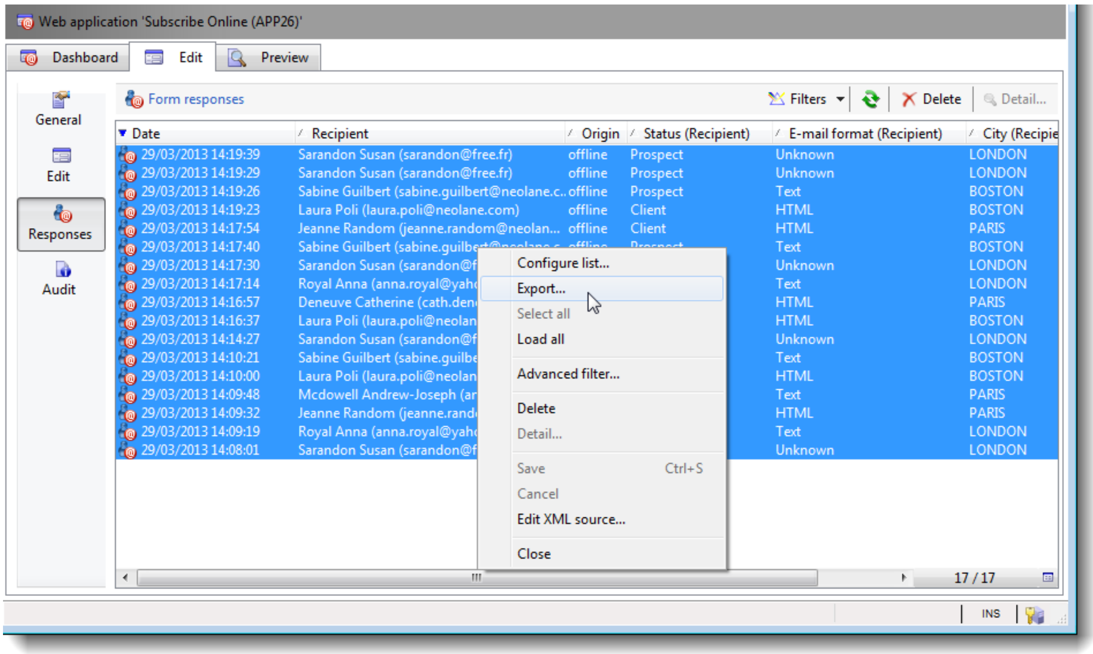
1. Exporting report data

   To export report data, click the **Export** button and choose the export format.

   For more on exporting report data, refer to the Reporting guide.

2. Exporting answers

To export answers, click the **Responses** tab of the survey and right-click. Select **Export...**.



Then enter the information you want to export and the storage file.

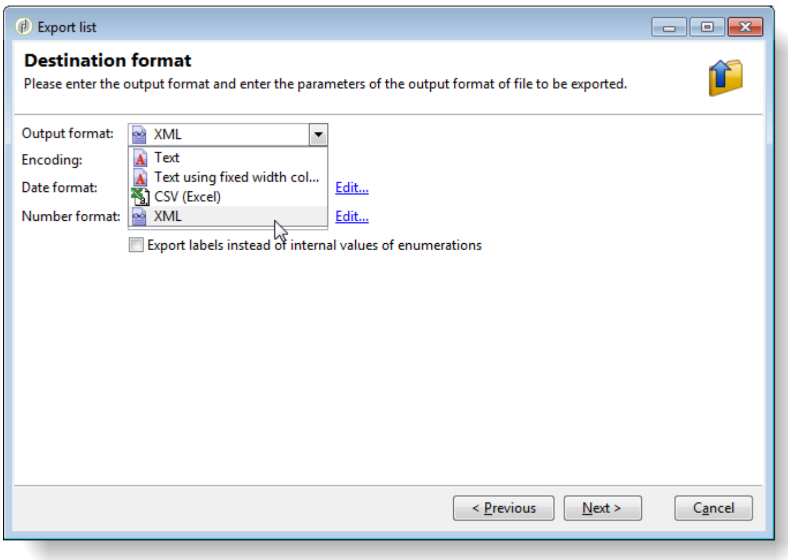
You can configure the content and format of the output file in the export wizard.

This lets you:

- add columns to the output file and recover the information on the recipient (which is stored in the database),
- format the exported data,
- select the encoding format for the information in the file.

Warning:

If the survey you want to export contains several **Multi-line text** or **HTML text** fields, it has to be exported in **XML** format. To do this, select this format in the drop-down list of the **Output format** field, as shown below:



Click **Start** to run the export.

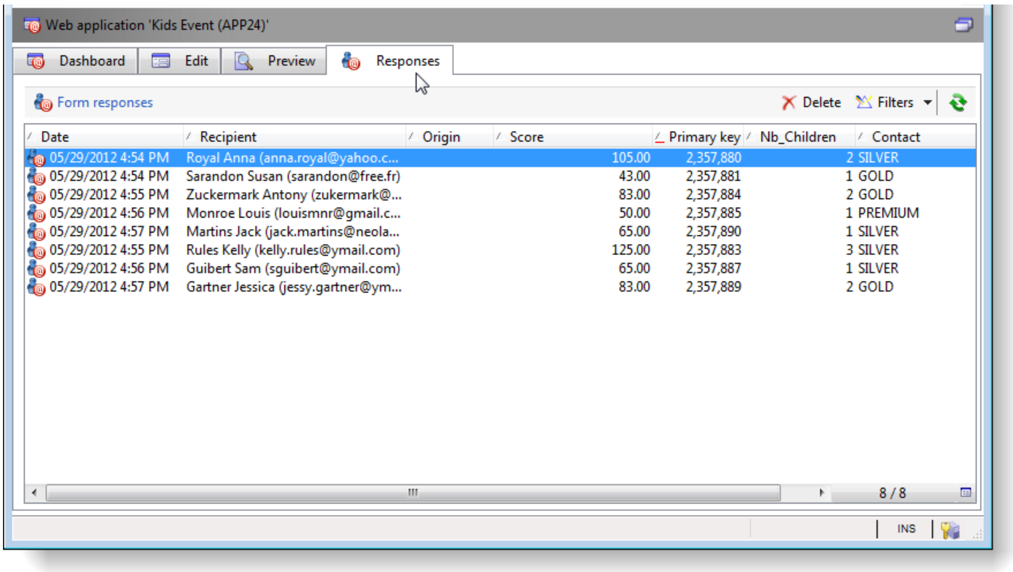
Note:

Data exports and the stages of their configuration are detailed in the Platform guide.

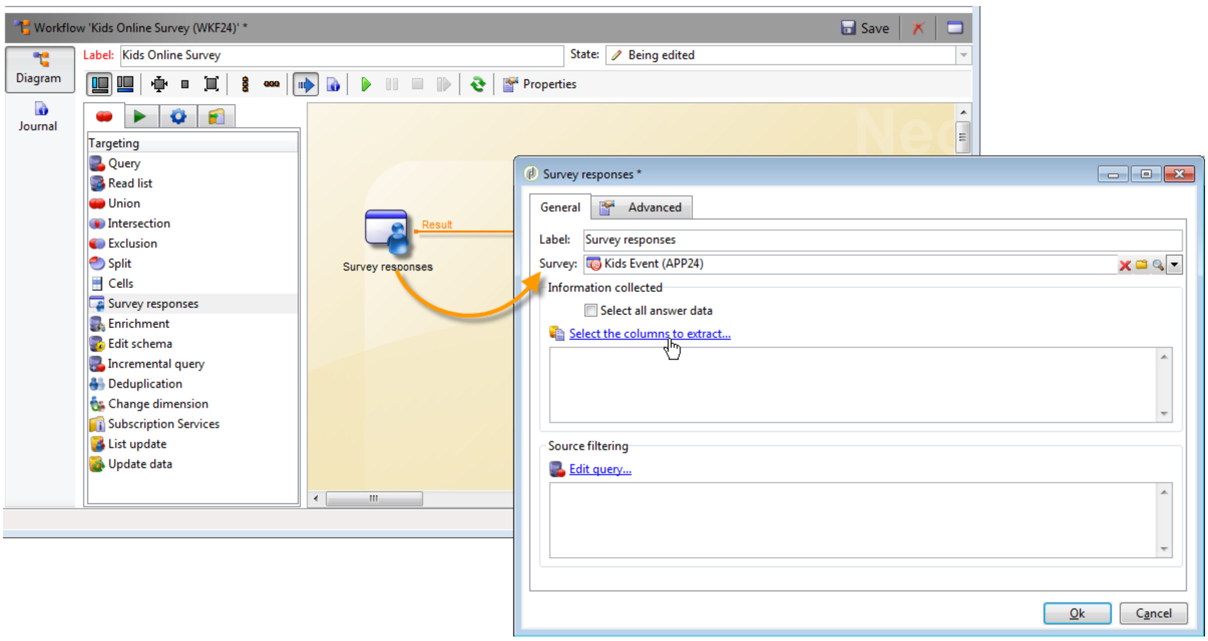
Using the collected data

The information collected via online surveys can be recovered within the framework of a targeting workflow. To do this, use the **Survey responses** box.

In the following example, we want to make a Web offer specially for the five recipients with at least two children and with the highest scores at an online survey. The answers to this survey are:

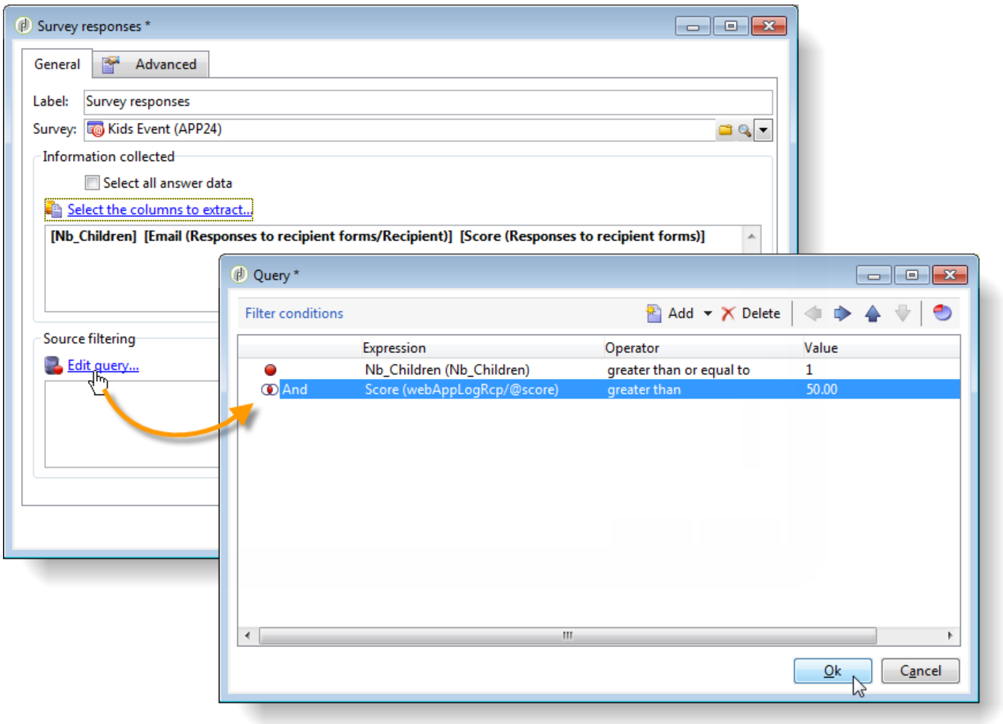


In the targeting workflow, the **Survey responses** will be configured as follows:

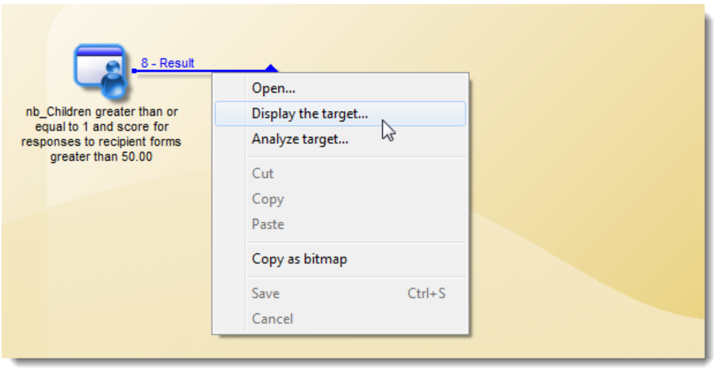


Start by selecting the concerned survey, then the data to extract in the central section of the window. In this case we need to extract at least the score column since it will be used in the split box to recover the five highest scores.

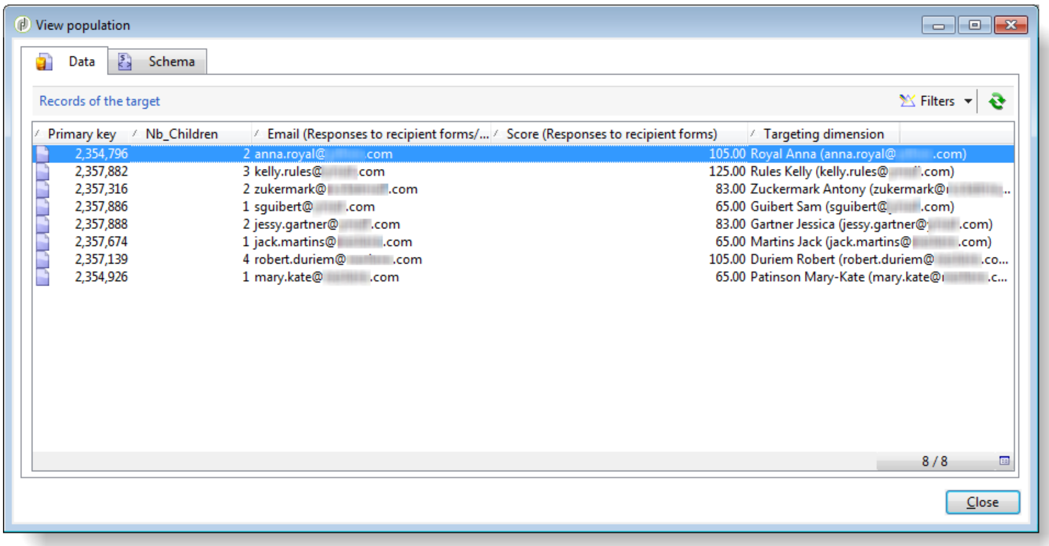
Indicate the filtering conditions for answers by clicking the **Edit query...** link.



Start the targeting workflow. The query recovers 8 recipients.

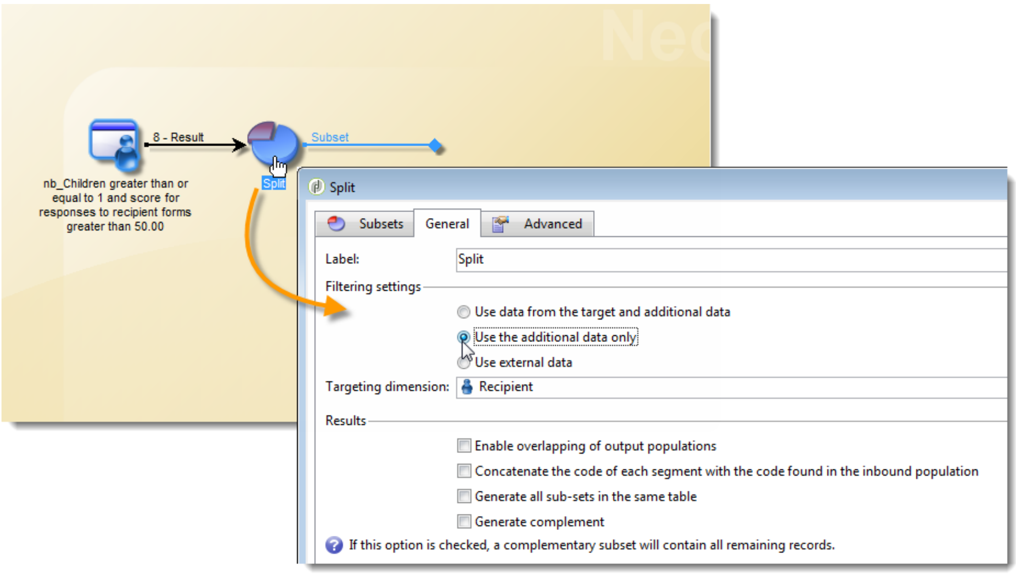


Right-click the output transition of the collection box to view them.

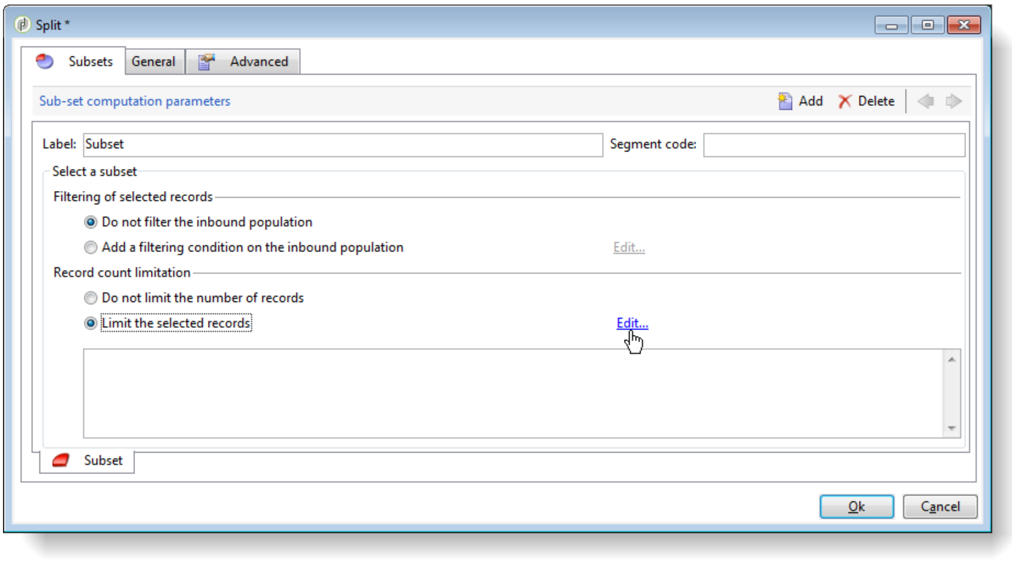


Then place a split box in the workflow to recover the 5 recipients with the highest score.
Edit the split box to configure it:

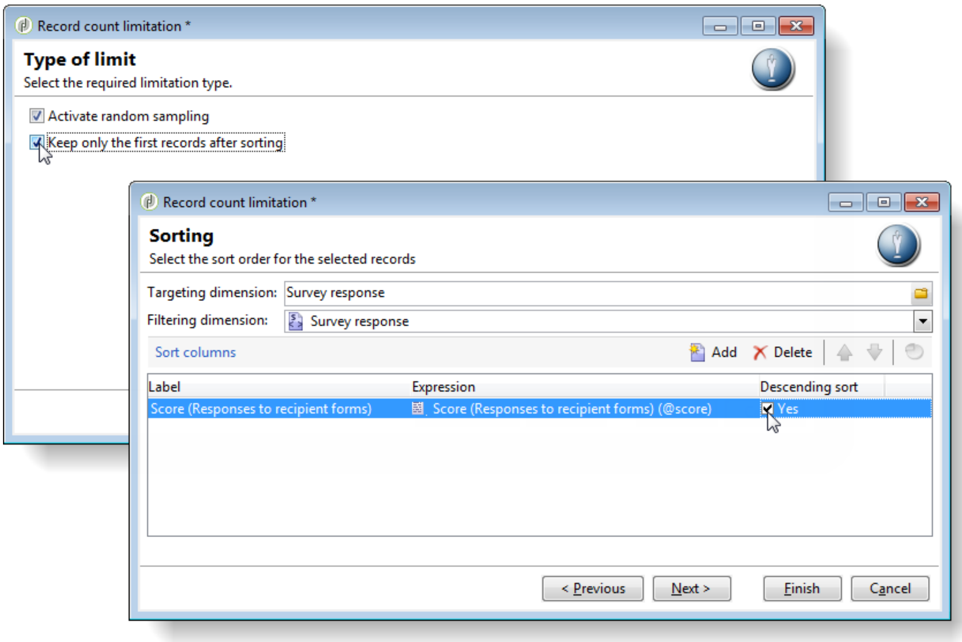
- Start by selecting the adequate schema in the **General** tab, then configure the sub-set:



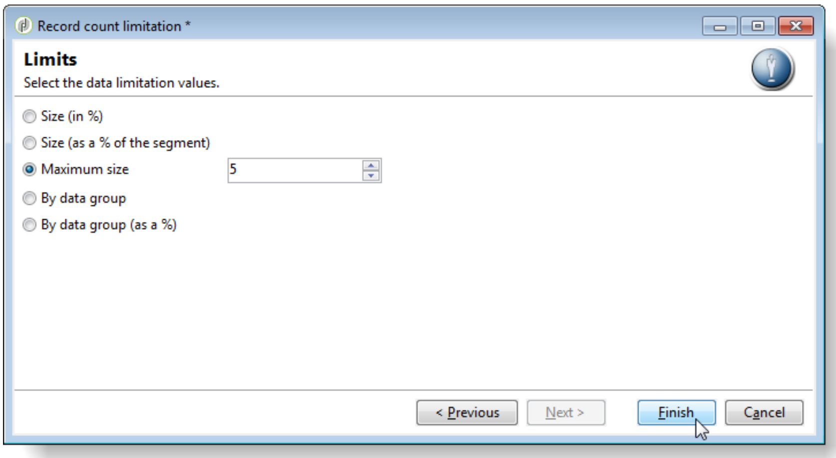
- Go to the **Sub-sets** tab and select the **Limit the selected records** option, then click the **Edit...** link.



- Select the **Keep only the first records after sorting** option and select the sort column. Check the **Descending sort** option.



- Click the **Next** button and limit the number of records to 5.



- Click **Finish** then restart the workflow to approve targeting.

Standardizing data

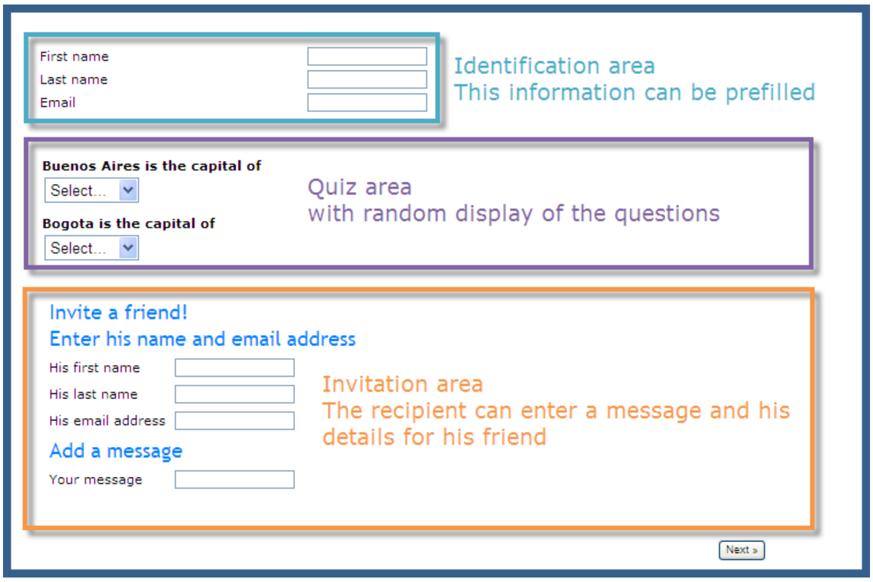
It's possible to set up standardization processes in Adobe Campaign for data collected using aliases. This lets you standardize the data stored in the database: to do this, define aliases in the itemized lists which contain the relevant information.

For more on this, refer to the "Itemized lists" section of the Platform guide.

Implementation example

Referring a friend

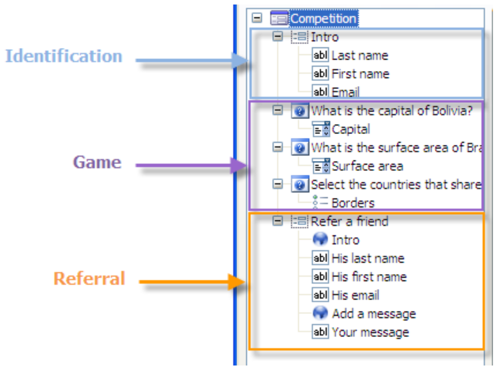
In this example, we want to offer a competition to the recipients in the database. The Web form will have a section for entering answers and another to refer a friend by entering their email address.



The identification and competition blocks are created using the processes described previously.

To configure and create the referral block, apply the following steps:

1 Create a competition Web form with questions and a field for entering a friend's contact information as shown below:



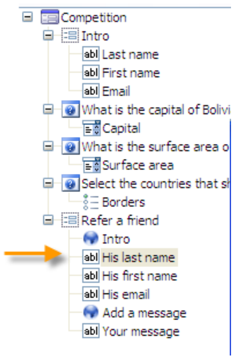
The **Your message** field lets you enter a message for the referee. The referrer must also enter their **Last name**, **First name** and **Email**.

The information entered in the fields is stored in a specific table known as the visitor table.

Note:

As long as the recipient hasn't given their consent, you cannot store them with the recipients in the database. They will be stored temporarily in the **visitor** table (**nms:visitor**) designed for viral marketing campaigns. This table is purged on a regular basis thanks to **cleansing** operations.

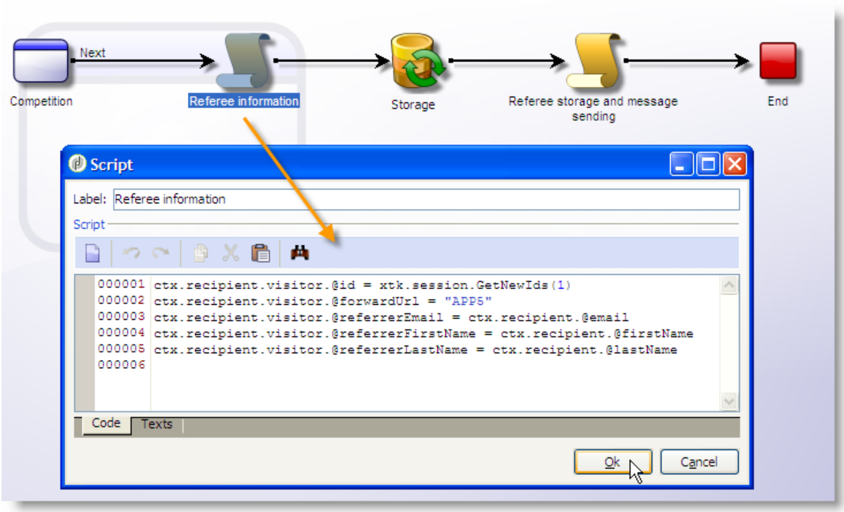
In this example, we want to target recipients to suggest they take part in the competition recommended by their referrer. However in this message we also want to offer them a subscription to one of our information services. If they subscribe, they can be stored in the database.



The content of the fields which concern the referee will be used in the profile creation script and in the message sent to them.

2 Start by creating a script to link the referrer to the referee.

It contains the following instructions:

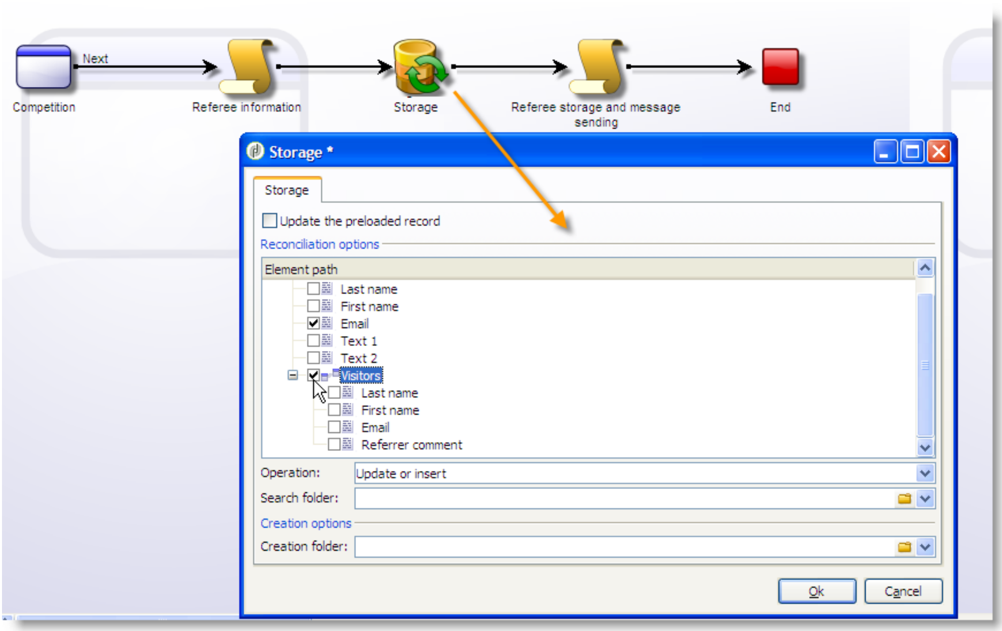



```
ctx.recipient.visitor.@id = xtk.session.GetNewIds(1)
ctx.recipient.visitor.@forwardUrl = "APP5"
ctx.recipient.visitor.@referrerEmail = ctx.recipient.@email
ctx.recipient.visitor.@referrerFirstName = ctx.recipient.@firstName
ctx.recipient.visitor.@referrerLastName = ctx.recipient.@lastName
```

The last name, first name and email address entered in the page identification block are identified as the last name, first name and email address of the referrer. These fields will be re-injected into the body of the message sent to the referee.

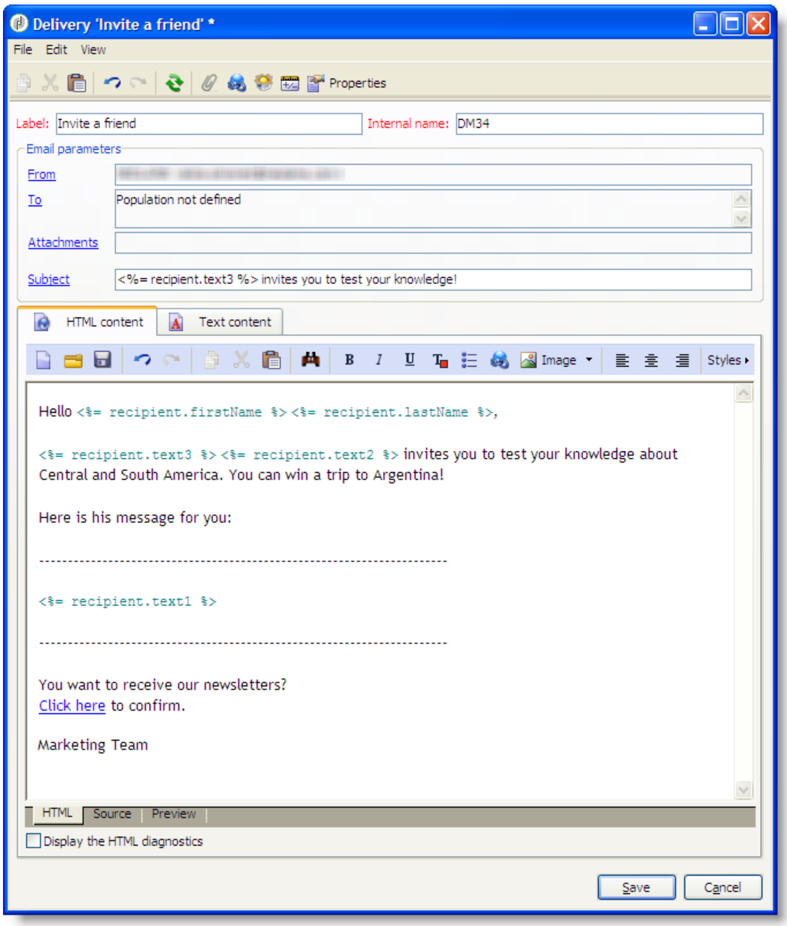
The APP5 value matches the internal name of the Web form: this information lets you find out the referee's origin, i.e. link the visitor to the Web form based on which they were created.

3 The storage box lets you gather information and store it in the database.



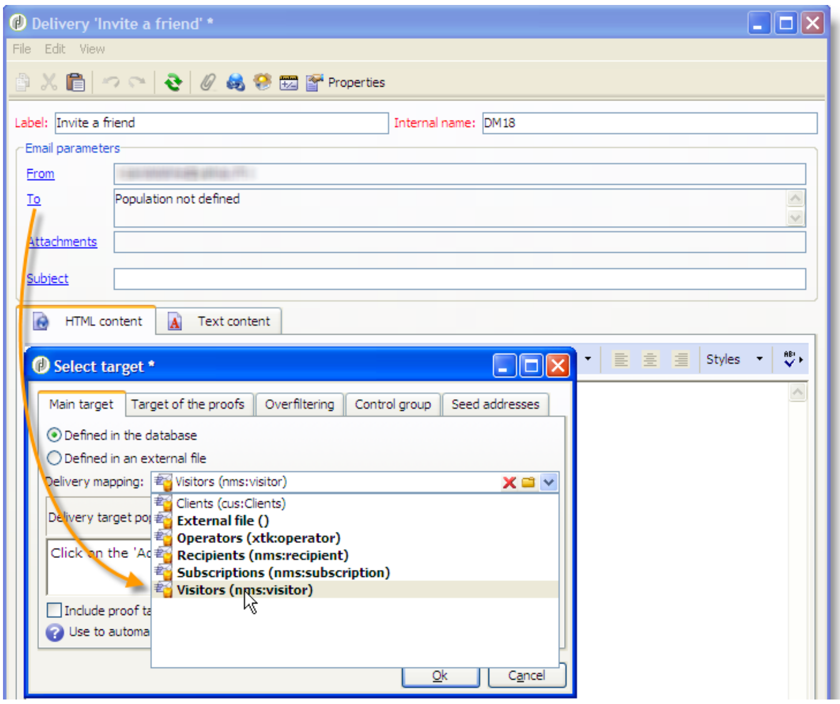
4 Then create the delivery template linked to the information service created during step 1. It will be selected in the **Choose scenario** field of the information service.

The delivery template used to create the referral offer message contains the following information:

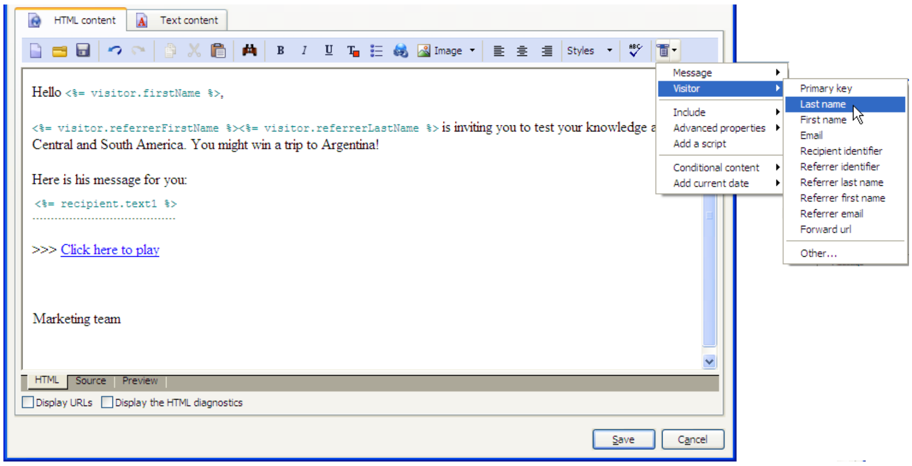


This template has the following characteristics:

- Select the visitor table as the target mapping.



- The referee's contact information as well as the information on the referrer are taken from the visitor table. It is inserted using the personalization button.



- This template contains a link to the competition form and the subscription link for the referee to subscribe to the newsletter.

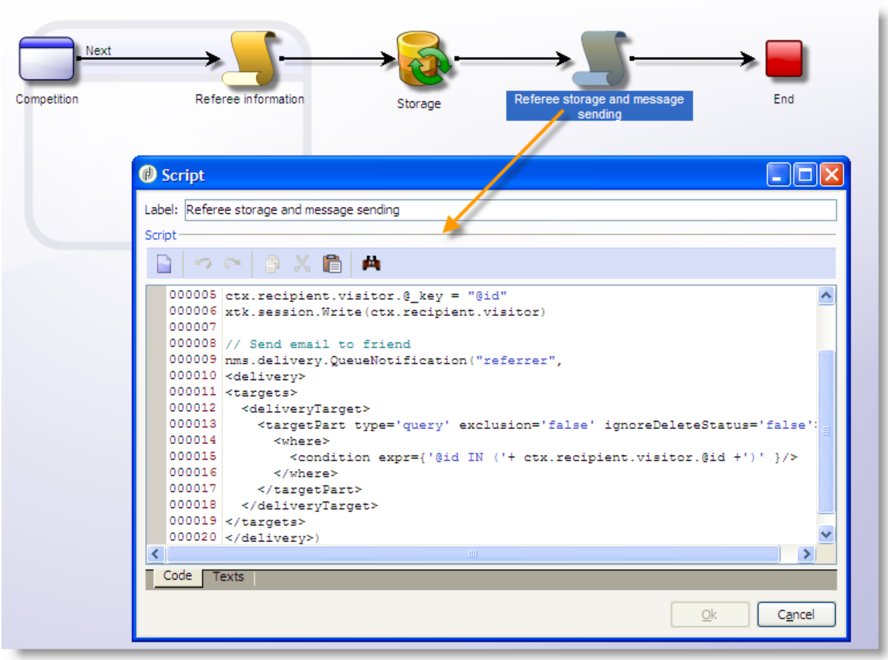
  The subscription link is inserted via a personalization block. By default, it lets you subscribe profiles to the **newsletter** service. This personalization block can be changed to suit your need, for example to subscribe the recipient to a different service.
- The internal name ('referrer' here) will be used in the message delivery script as shown below.

Note:

Refer to Delivery for more information on delivery templates.

---

5 Create the second script for delivering the subscription messages.

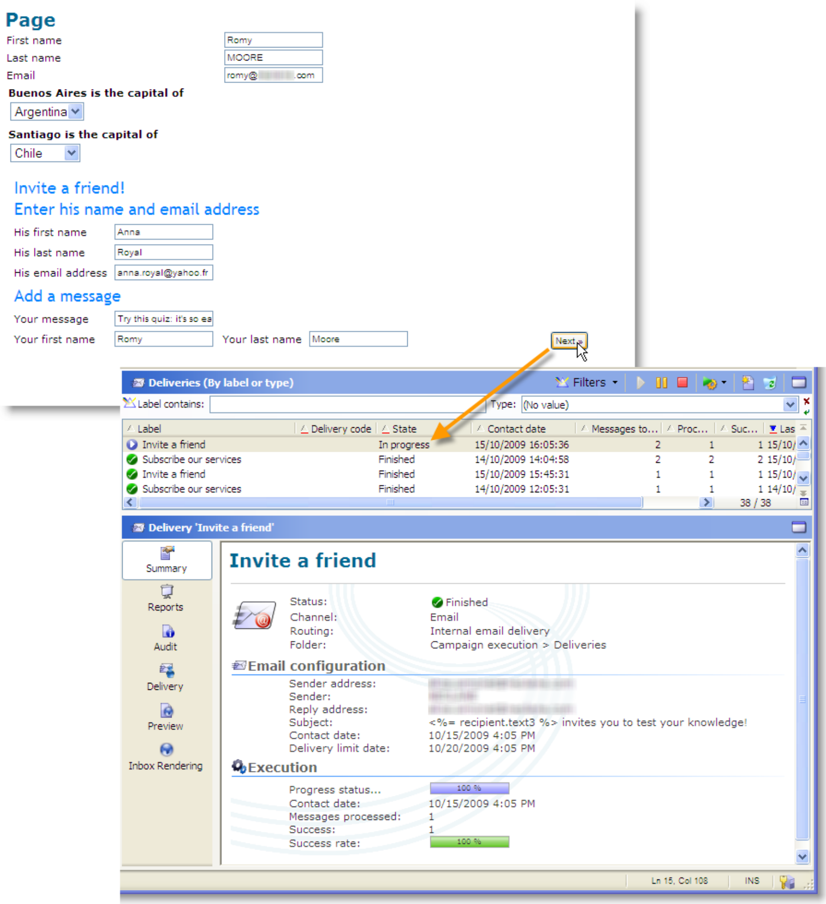



```
// Updtate visitor to have a link to the referrer recipient
ctx.recipient.visitor.@referrerId = ctx.recipient.@id
ctx.recipient.visitor.@xtkschema = "nms:visitor"
ctx.recipient.visitor.@_operation = "update"
```

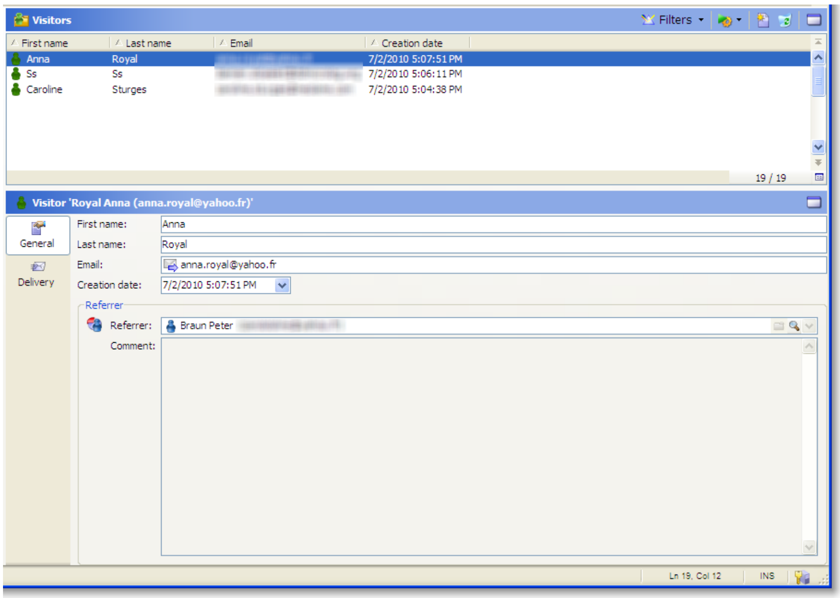
```
ctx.recipient.visitor.@_key = "@id"
xtk.session.Write(ctx.recipient.visitor)

// Send email to friend
nms.delivery.QueueNotification("referrer",
<delivery>
<targets>
  <deliveryTarget>
    <targetPart type='query' exclusion='false' ignoreDeleteStatus='false'>
      <where>
        <condition expr={'@id IN ('+ ctx.recipient.visitor.@id +')' }/>
      </where>
    </targetPart>
   </deliveryTarget>
  </targets>
 </delivery>)
```

6 Publish the competition form and send an invitation to the recipients of the initial target. When one of them invites a friend, a delivery based on the **Referral offer** template is created.



The referee is added to the visitor folder in the **Administration > Visitors node**:



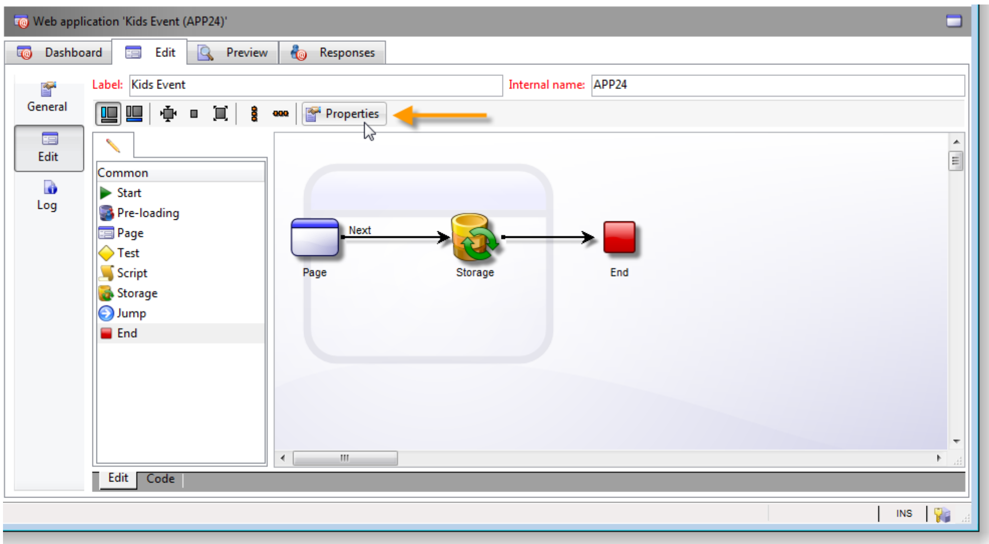
Their profile contains the information entered by their referrer. It is stored based on the configurations entered in the form script. If they decide to subscribe to the newsletter, they will be saved in the recipient table.

Configuring surveys

Advanced parameters

Web forms are fully configurable and personalizable to satisfy your requirements. The parameters must be entered in the properties window.

The available parameters are detailed in Defining form properties [page 123].



Data storage

By default, the Web form fields are stored in the recipient table. To use another table, select it in the **Document type** field. The **Zoom** icon lets you view the content of the selected table.

Answers to surveys provided by users which aren't stored in the fields (but in local variables) are stored in the **Answers to surveys** fields. You can change the schema used based on the **Library** field. This field is only available for **surveys**.

Adobe Campaign

CHAPTER 6

Personalized sites

Table of Contents

Overview

A microsite is a personalized website which guests can access by clicking a personalized URL. This URL can be included in an email or a direct mail delivery: in this case, the website, which is personalized for each campaign recipient, lets you update their information and send them a personalized offer (registration for a trade fair, subscription to a service, special offers, etc.). If the guests access the site via a public URL published on Facebook or Twitter for instance, the microsite which they will access lets them create their profile in the database. The activity on the site (access, display of the various stages, interaction with the guest) can be tracked and is analyzed in reports which detail the microsites' efficiency and traffic.

Recommendations

To guarantee Microsite security as well as the efficient operating of your Adobe Campaign platform, we highly recommend that you implement best practices:

Refer to Usage rules [page 297].

Prerequisites

Before creating your microsite, make sure you have carried out the following configurations:

1. Install the **Microsites** module in Adobe Campaign.

   Install this module to benefit from the functionalities of personalized URLs (pURL domains and sub-domains, pURL templates) as well as microsite type web applications.
2. Configure the instance

   Using personalized URLs means configuring your Adobe Campaign instance beforehand, including:

   - Change your DNS infrastructure to take domains and sub-domains used by pURLs into account,
   - add domains created in the configuration file of the instance,
   - indicate the tracking server to be used,
   - create enumerations to match the domains that will be used by pURLs,

   For more on this, refer to the Installation guide.
3. Choice of the pURL publication mode.

   The pURL publication mode needs to be configured based on your architecture.

   For more on this, refer to configuring the Deployment wizard in the Installation guide.
4. Configure the web tracking mode (optional)

   If you plan on anonymous guests logging on to your microsite, you may need to configure anonymous web tracking.

   For more on this, refer to the Web tracking mode section in the Configuration guide.

Once these tasks are completed, you can create the URL templates and the microsite.

Implementation

To set up a microsite and track its activity, the steps are as follows:

1. Create a personalized URL template: define the URL for accessing the personalized site and select the variables that make up the URL.

   Refer to Creating a pURL template [page 234].
2. Set up a microsite: create a microsite or a microsite template and configure the microsite content in a diagram.

   Refer to Creating a microsite [page 245].
3. Create a personalized URL: link a personalized URL to a microsite via a template and insert a URL into a delivery.

   Refer to Personalized URLs [page 256].
4. Display the reports for measuring the microsite's activity.

   Refer to Tracking access to the microsite [page 267].

Creating a pURL template

Creating a new template

pURL templates are stored in the **Resources** > **Templates** node of the Adobe Campaign tree.

Warning:

Adobe Campaign offers a default template: duplicate it to create new templates and configure them based on your needs. DO NOT modify the default template.

The pURL format depends on the parameters defined in the template which they are created from.

The available fields and settings are detailed below. The data entered or selected in the template lets you define the personalized URL format.

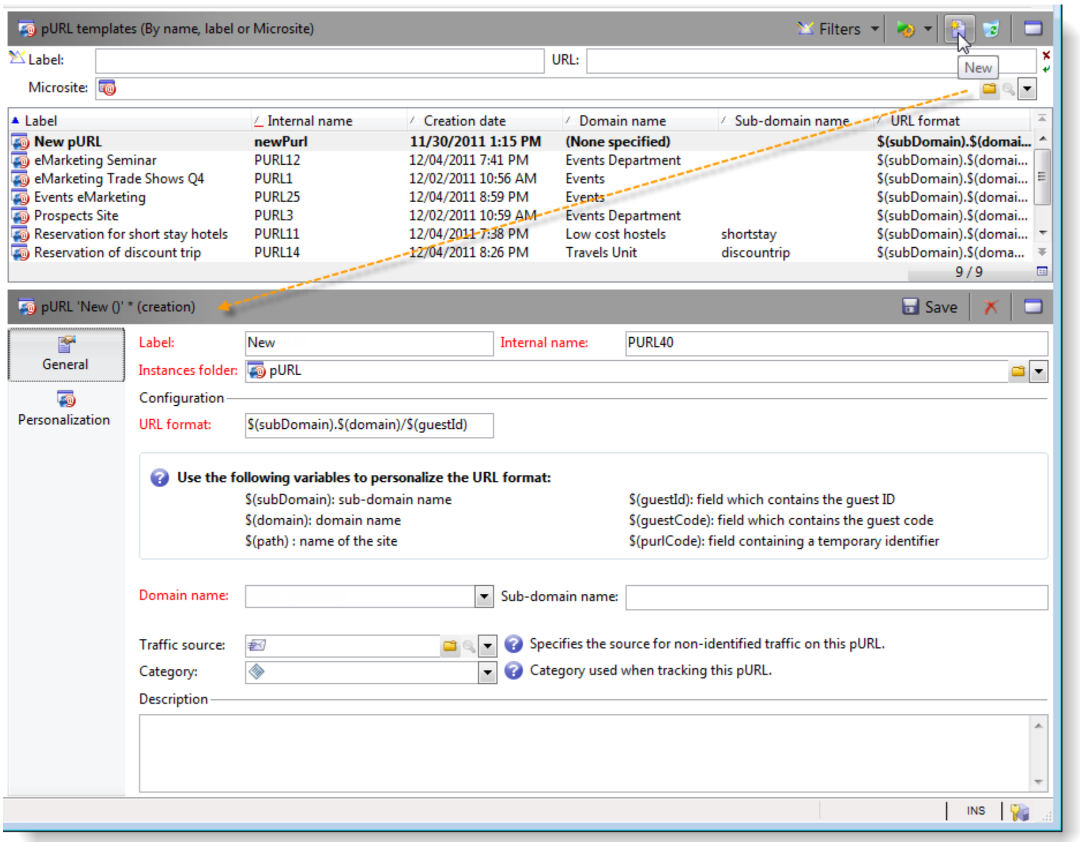
Note:

Configuring pURL templates is reserved for expert users.

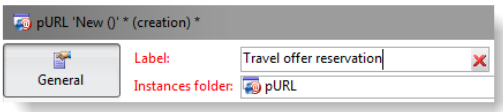
Before you create pURL templates, you need to make sure your DNS infrastructure has been altered to take the domains and sub-domains you are going to use into account.

To create a personalized URL template, apply the following steps:

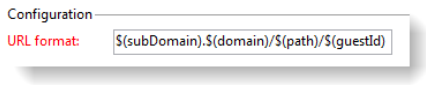
1 Click the **New** button below the list of pURL templates.



2 Change the label and adapt the folder in which the pURL instances created from this template will be saved.

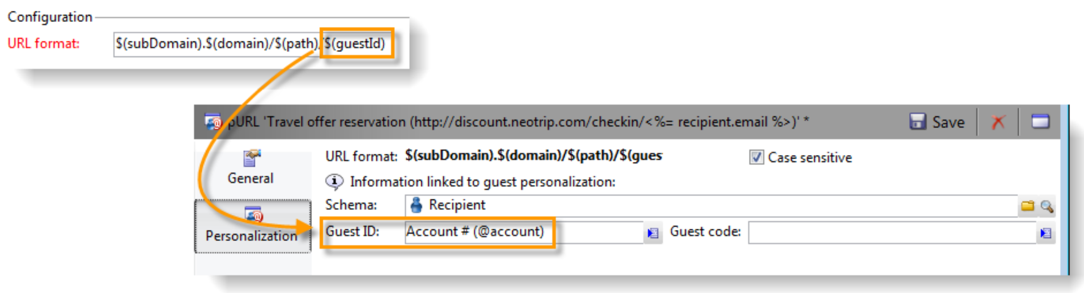


3 Enter the variables that make up the URL in the **URL Format** field. For more on this, refer to URL format [page 236].



4 Select the domain from the drop-down list and, if applicable, the sub-domain or the name of the site. For more on this, refer to Domains and sub-domains [page 237].

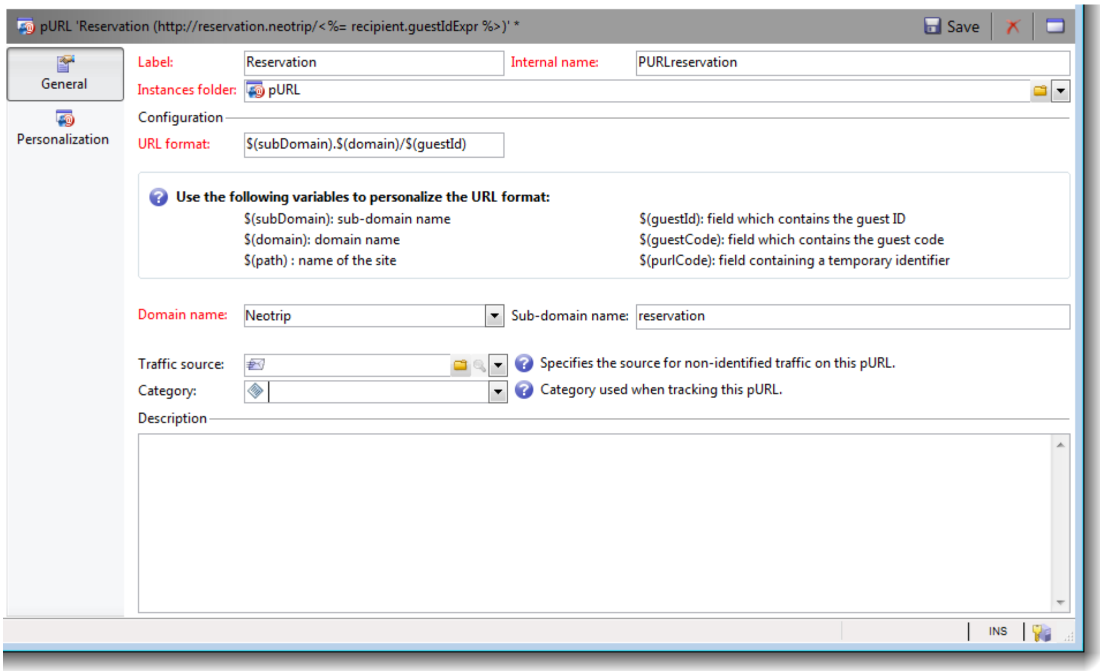
5 If you use `$(guestId)` and `$(guestCode)` variables in URL format, go to the **Personalization** tab in the template and define the parameters linked to the guest. For more on this, refer to Identifying guests [page 239].



URL format

The URL format is defined in the relevant field based on the available variables. You can display the variables according to the layout and level of security you want for the URL.

The preview of the URL as it will appear in the body of a delivery is automatically displayed in the template's title bar.



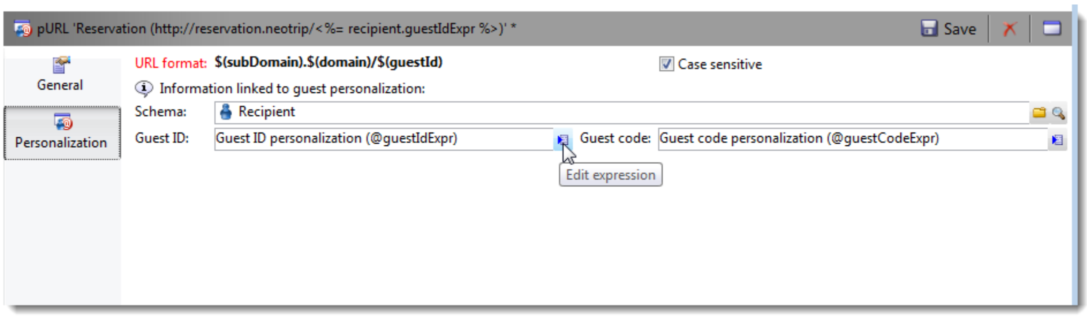
The available variables are detailed in URL personalization [page 237].

Warning:

A pURL must include a domain.

If the URL contains the **$(guestId)** variable, you must define a schema to be able to reference a field in the database.

The **Personalization** tab lets you change the URL format and select the personalization information linked to guests.



For more on this, refer to Identifying guests [page 239].

URL personalization

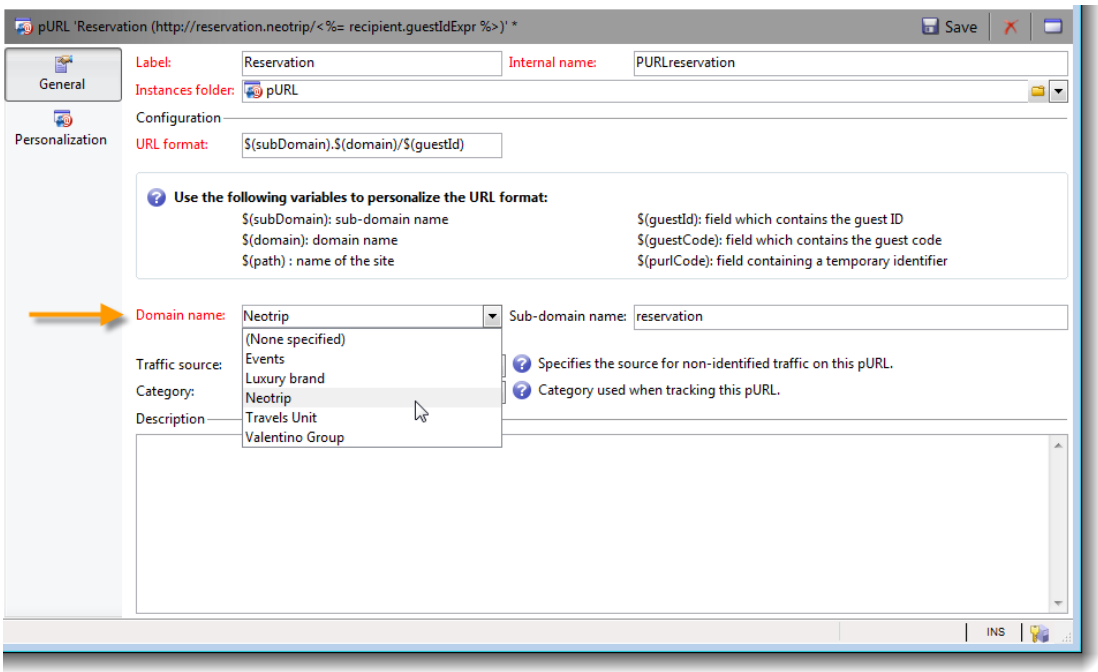
You can change the variables displayed as well as their sequence and default syntax. To do this, adapt the contents of the **URL format** field. Available variables are shown below.

Domains and sub-domains

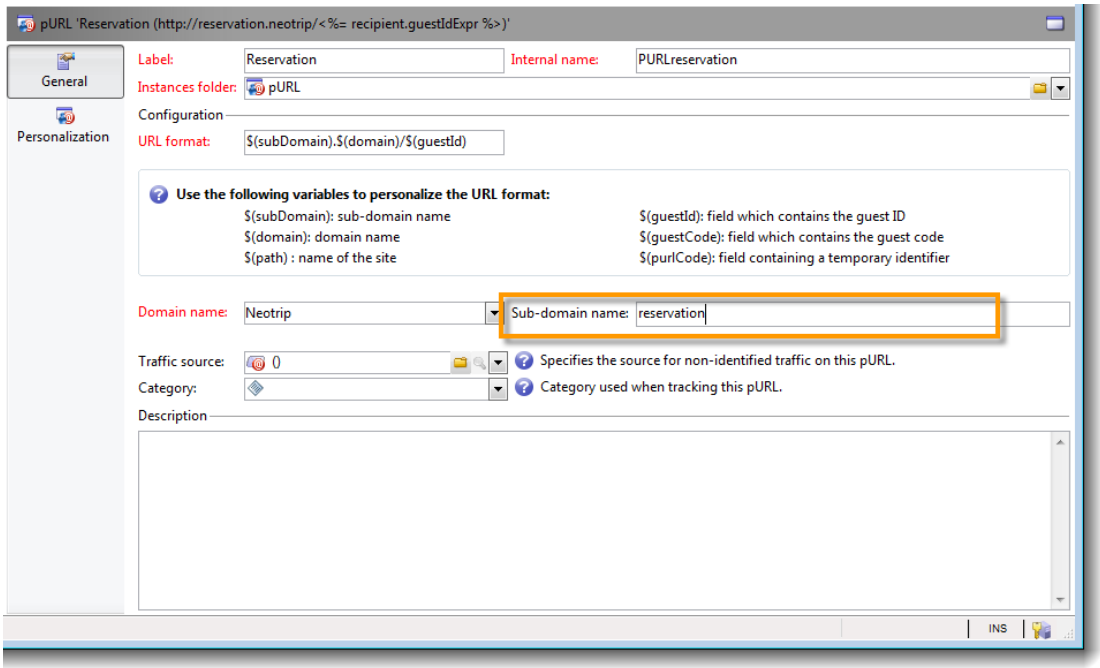
The name of the domain is represented by the **$(domain)** variable. it is selected among the domains defined in the matching itemized list. Rather than using its current domain name, we recommend creating a domain dedicated to the microsite. You are legally obliged to be the owner of this domain.

Note:

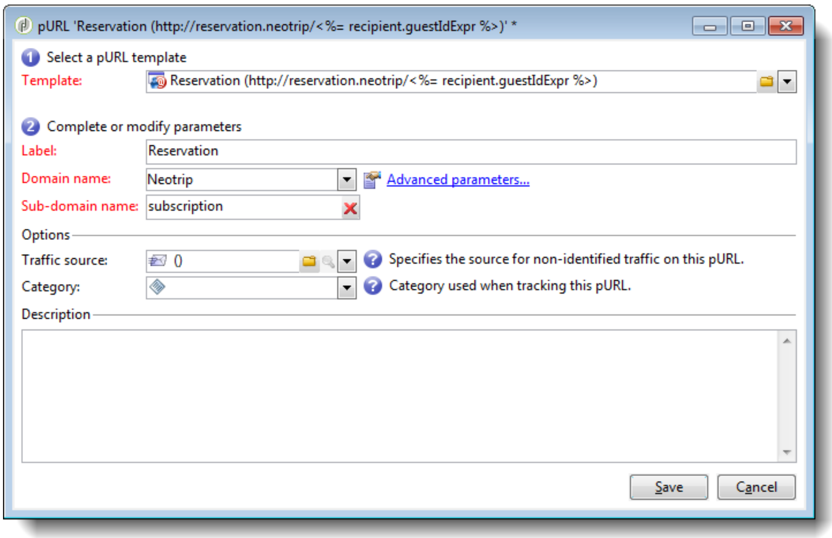
The list of domains is configured by the Administrator. For more on this, refer to the Installation guide.



The sub-domain is represented by the **$(subDomain)** variable. The name of the sub-domain can be entered in the template.



If a sub-domain name has been specified in the template, it can be overloaded when the pURL is added. This means that Adobe Campaign operators can create several sub-domains linked to the same domain using a single pURL template.



Warning:

It is mandatory to specify a domain in the pURL format.

Site

The name of the site is entered in the relevant field. It matches the **$(path)** variable and is only displayed if this variable is found in the **URL format** field. Just like the sub-domain, it can be entered in the template or in the pURLs created based on the template.

Identifying guests

Recipients who access a Microsite via a pURL are called 'guests'.

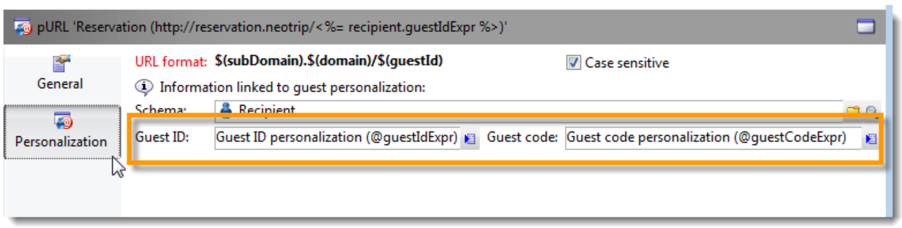
Identifier and guest code

Each guest has a unique identifier represented by the **$(guestID)** variable. You can also assign them a personalized and optional access code represented by the **$(guestCode)** variable. These two variables enable you to complexify a pURL and secure access to the related microsite.

Also, when a recipient clicks a pURL to access a Microsite, Adobe Campaign automatically collects all available information on this guest, if they are in the database. If the microsite contains a pre-loading page, personalization information may be displayed (for more on this, refer to Data pre-loading [page 251]).

The **$(guestID)** and **$(guestCode)** variables are also used to check the authentication of guests on the microsite access control page, if applicable (for more on this, refer to Microsite access control [page 251]).

To enable the guest to identify themselves, you need to link the **$(guestID)** and **$(guestCode)** variables to the fields in the database. To do this, click the **Personalization** tab of the template and select the concerned schema, as well as the fields that will match the **Guest ID** and the **Guest code**.



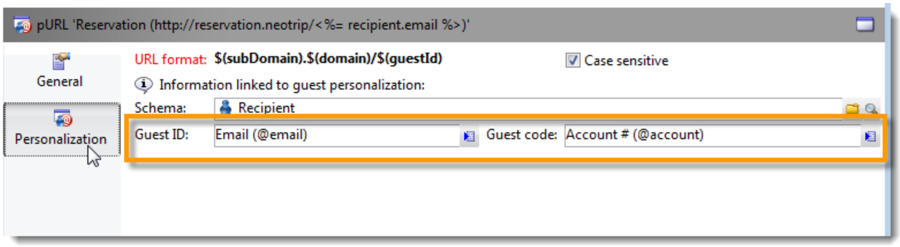
Note:

Since this configuration is reserved for expert users, we recommend configuring the identifier and the guest code straight in the pURL template rather than when adding the pURL to the microsite.

The database field selected for the identifier or the guest code must be unique and never change. It can be the ID of the recipient schema, the account number, or a customer code, for instance. The safest way of guaranteeing ID durability and the highest possible security level is to create a dedicated field in the database that will be calculated by a workflow.

You can choose whether or not to display the guest code in the pURL depending on whether or not the exposed data is sensitive or confidential. You need to decide between security and use constraints. In both cases, if there is an authentication page in the microsite, the guest will be asked to enter their code.

- Example: the **$(guestCode)** variable is included in the pURL format.

  The benefits of this type of format are that the complexity of the URL prevents uninvited guests from guessing the microsite URL. Also, since the guest doesn't need to remember a code, connection to the microsite is easier. However, if the URL is forwarded to an unwanted person, access to the microsite will no longer be secure.

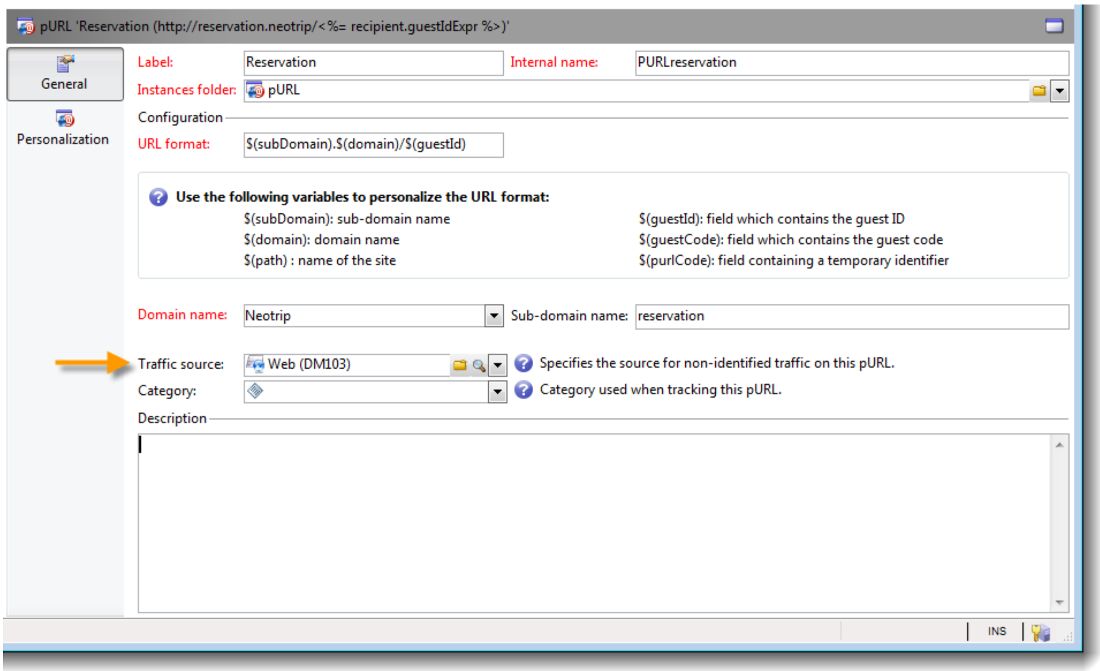
- Example: the **$(guestCode)** variable isn't included in the pURL format but is configured in the pURL template.

  In this case, the code that matches the **$(guestCode)** variable must be sent to guests either at the same time as the pURL, or separately. Since the security level is increased by the absence of the guest code within the URL, you don't need to place the authentication page first on the microsite.

Traffic source

When a guest accesses a Microsite via a pURL, Adobe Campaign identifies the source of the traffic on the Microsite by linking the pURL to the delivery it was inserted into.

However, sometimes the traffic source isn't identified, especially when the guest accesses the Microsite via a forwarded mail or by entering the address directly into the browser, as opposed to clicking the link in an email sent by Adobe Campaign. In this case, you can define a default traffic source using the **Traffic source** field of the pURL.



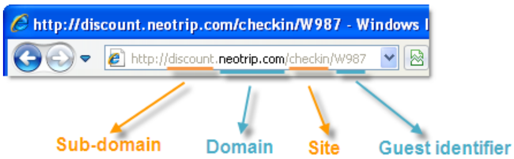
In this field, select an **Other** type delivery which will be linked to the guest by default when traffic on this pURL isn't identified.

An **Other** type delivery is a technical delivery which isn't designed to send messages. Here, it is only used to identify traffic sources.

Example: creating a personalized URL

In this section, we want to create a pURL template. The final URL obtained based on this template will look like this: http://discount.neotrip.com/checkin/W987

This URL is made up of a sub-domain, a domain, a site name and an identifier.

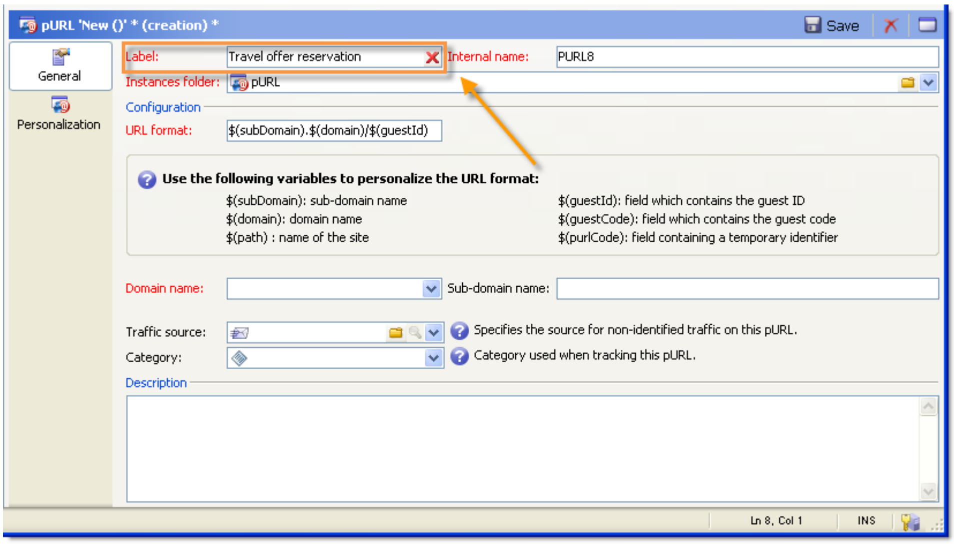


The details on the variables that make up the pURL are detailed in URL format [page 236] and URL personalization [page 237].

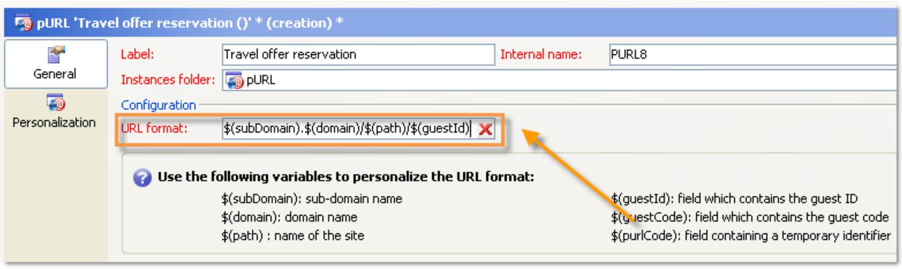
To create the personalized URL template, apply the following steps:

1. Right-click the list of pURL templates or click the **New** button above the list,
2. Change the label of the template,

In our example, the template label is `Travel offer reservation`.

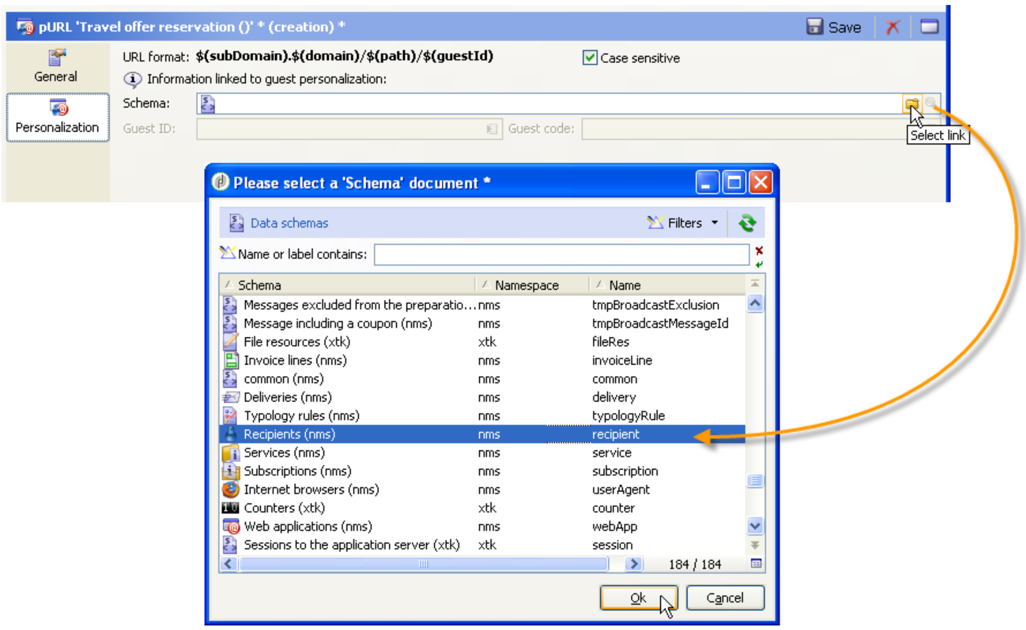


3 In the **URL format** field, enter the following format: `$(subDomain).$(domain)/$(path)/$(guestId)`,

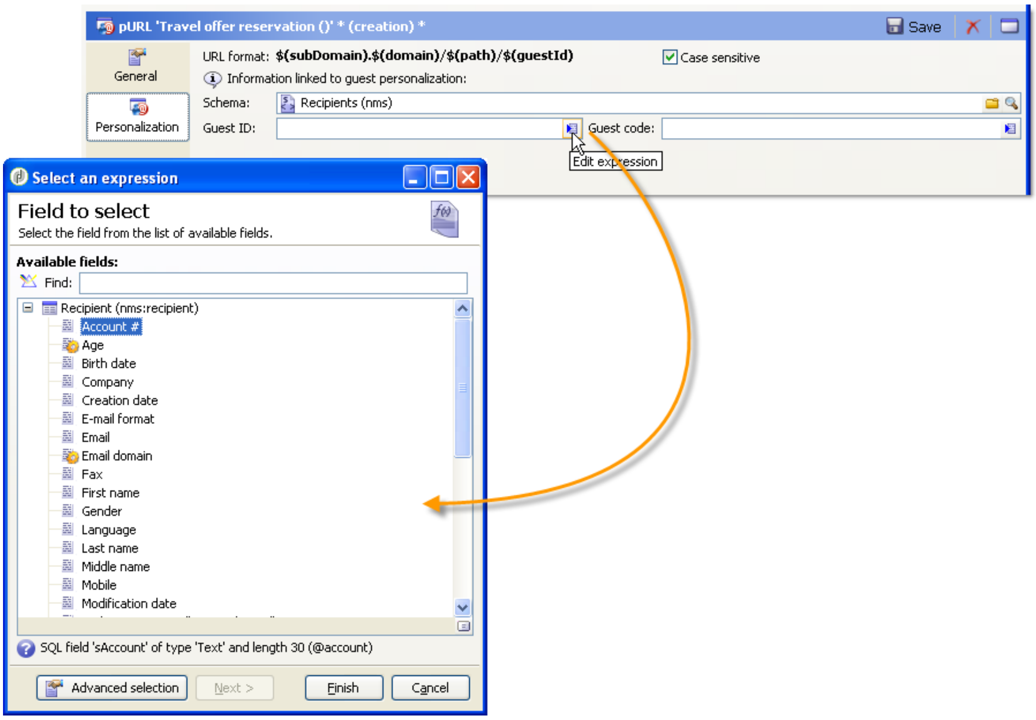


4 Click the **Personalization** tab,

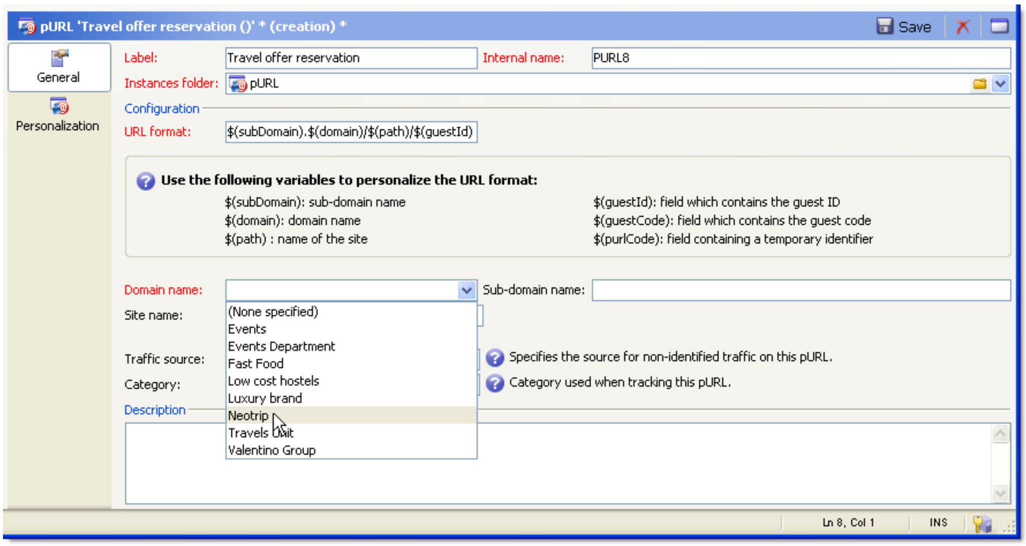
5 Select the `Recipients` schema.



6 Go to the **Guest ID** field, click **Edit expression** and select the account number as the identifier,

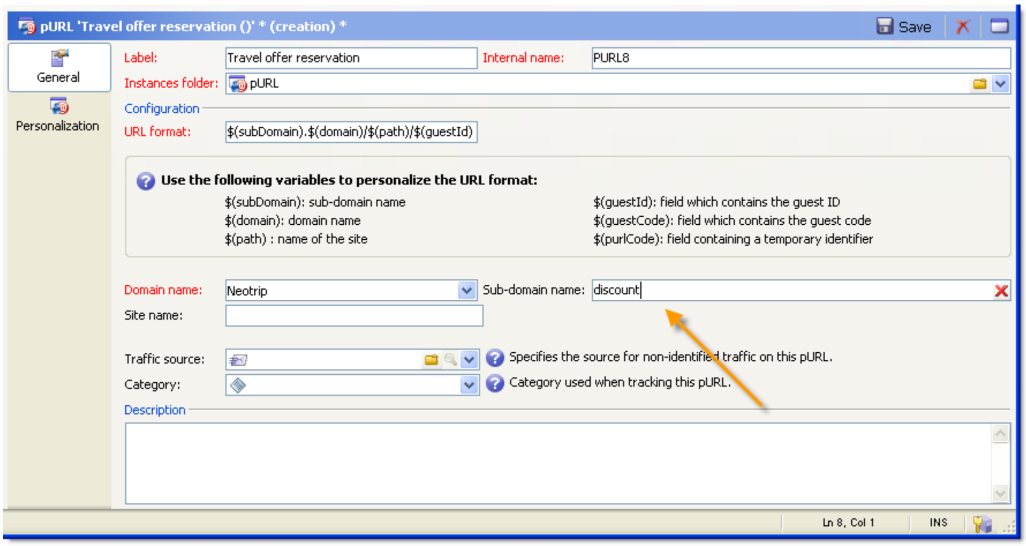


7 Select a domain name from the drop-down list in the **General** tab.

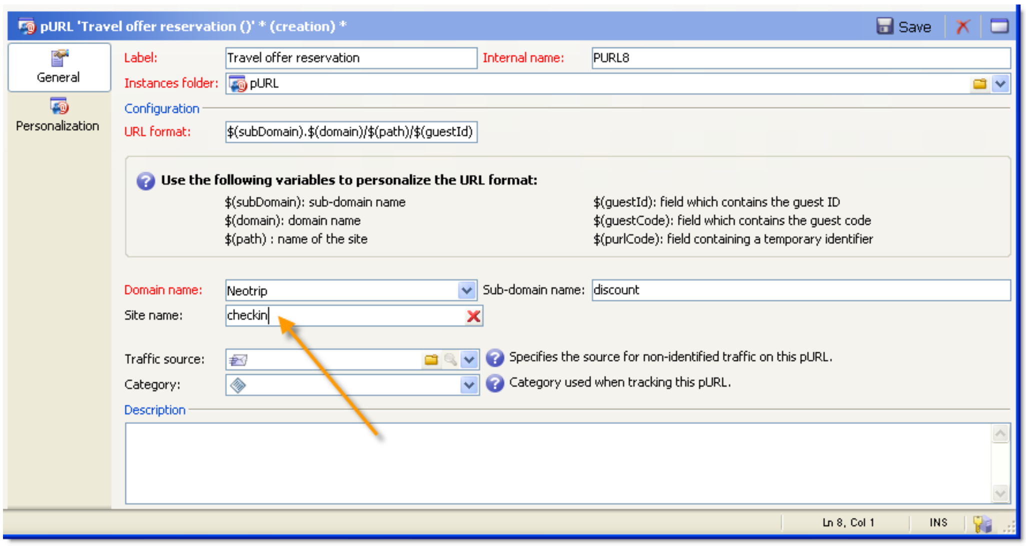


The domains need to be created beforehand (refer to Prerequisites [page 234]).

8 Specify the name of the sub-domain in the appropriate field,



9 Specify the name of the site that matches the `$(path)` variable,

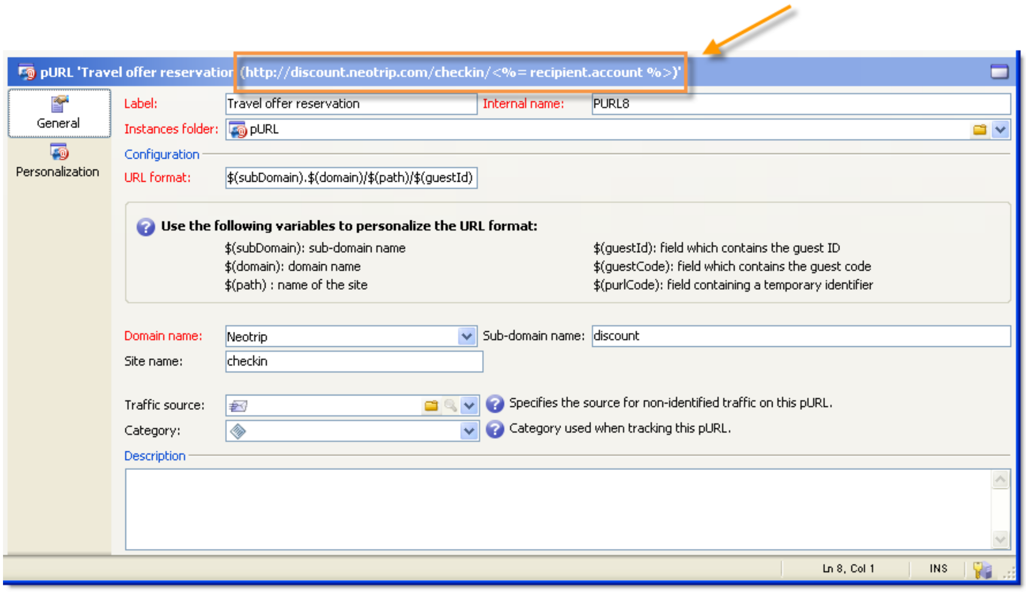


Note:

Specifying the name of the site in the pURL format is not mandatory.

10 Click **Save**.

The URL as it will appear in a browser is visible in the title bar.



Creating a microsite

Creating a microsite involves the following steps:

1. Creating one or more pURLs which will be linked to the microsite.

   For a detailed description of how to create pURLs, refer to Personalized URLs [page 256].
2. Creating a microsite based on a template which supports pURL functionalities (refer to Creating a microsite [page 245]),
3. Creating content for the microsite (refer to Creating a microsite content [page 251]).

Warning:

To add pURLs to a microsite, the operator must have the minimum associated access rights:

- Read / Write in the pURL folder. By default: **Administration** > **Production>pURL**.
- Read / Write in the pURL templates folder. By default: **Resources** > **Templates** > **pURL templates**.

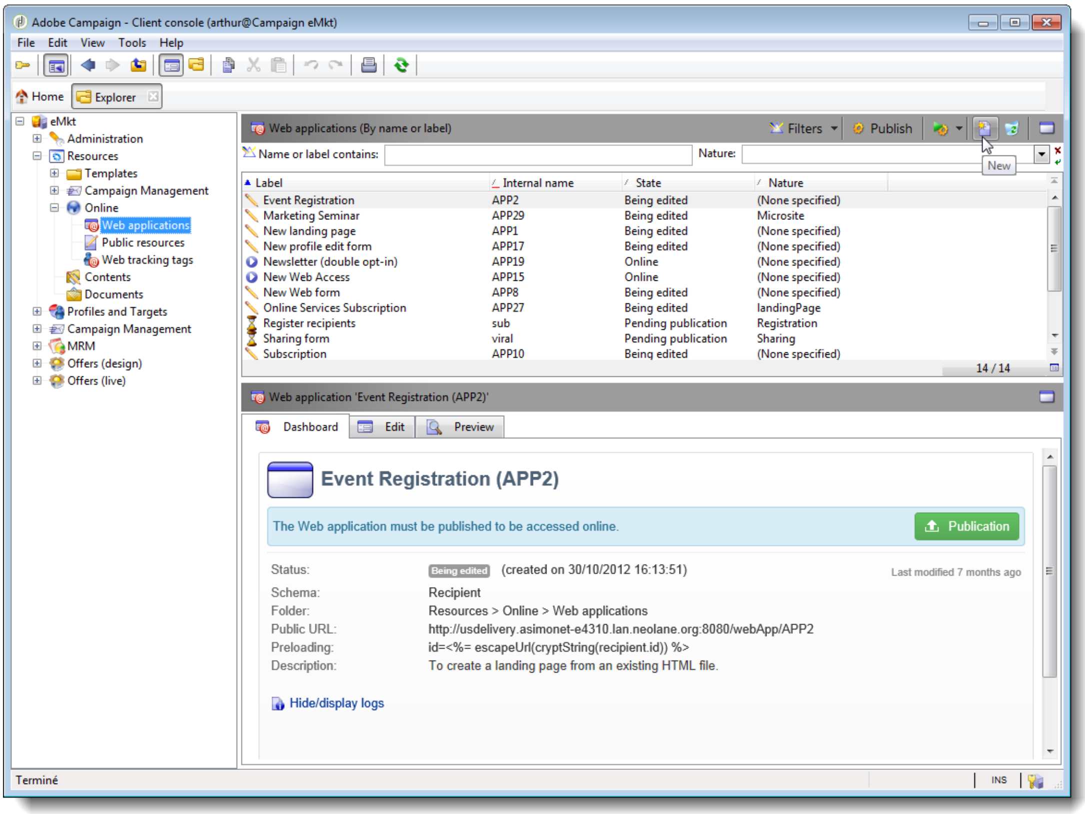
We recommend creating specific sub-folders according to the context of operator interventions.

Creating a microsite

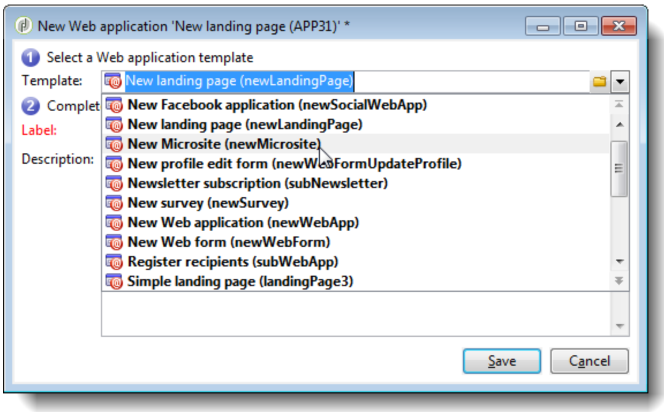
Microsites are created in the **Web applications** menu which can be found in the **Campaigns** and **Profiles and targets** universes. By default, they are stored in the **Resources** > **Online** > **Web Applications** folder.

To create a microsite, apply the following steps:

1 In the list of web applications, right-click and select **New**, or click the **New** button above the list of web applications,

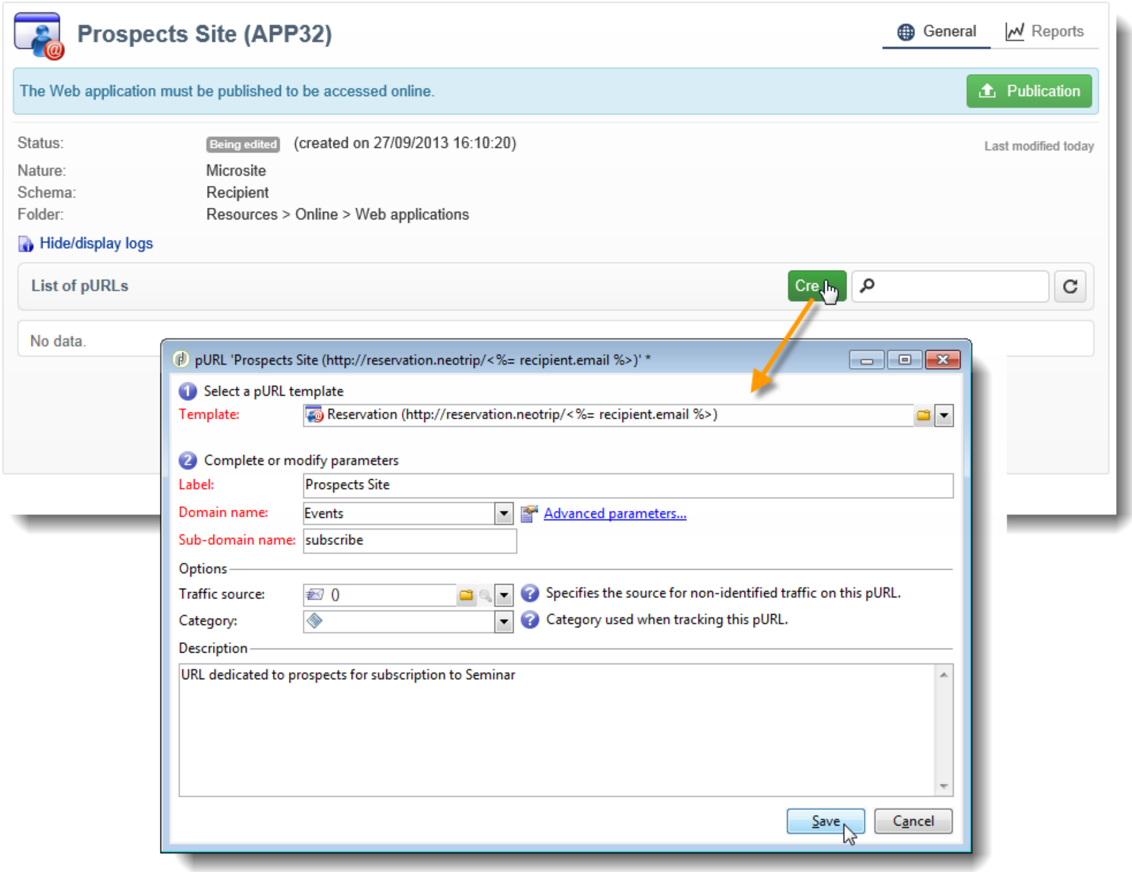


2 Select the microsite template available in the drop-down list (refer to Using a microsite template [page 249]),

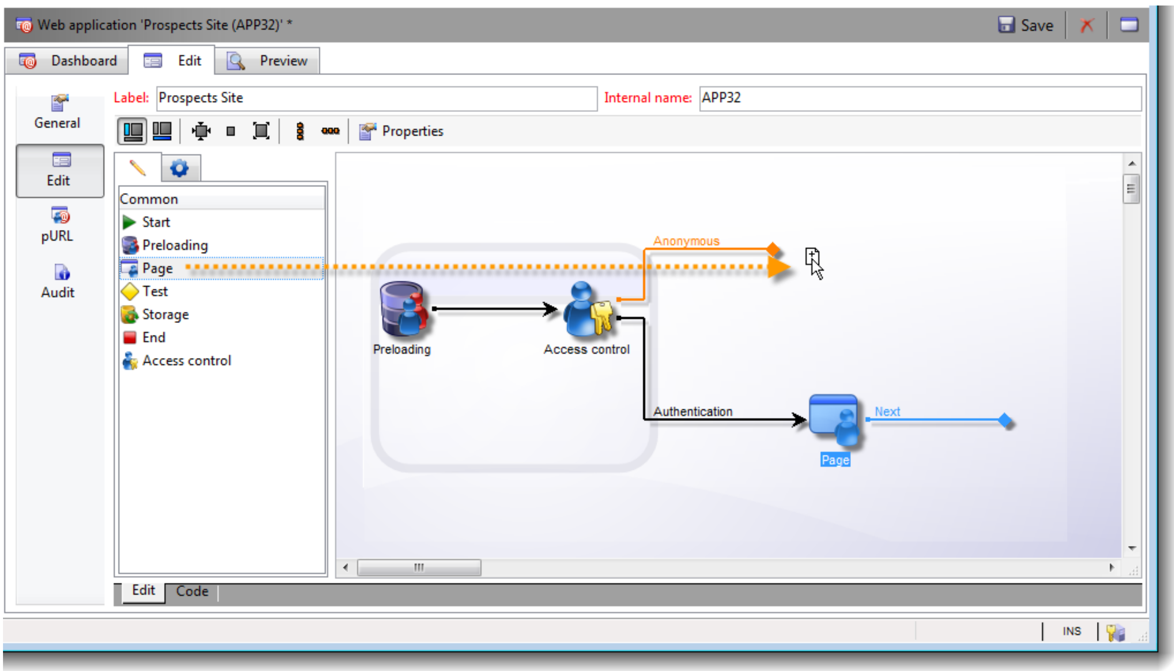


Click **Save** to create the microsite.

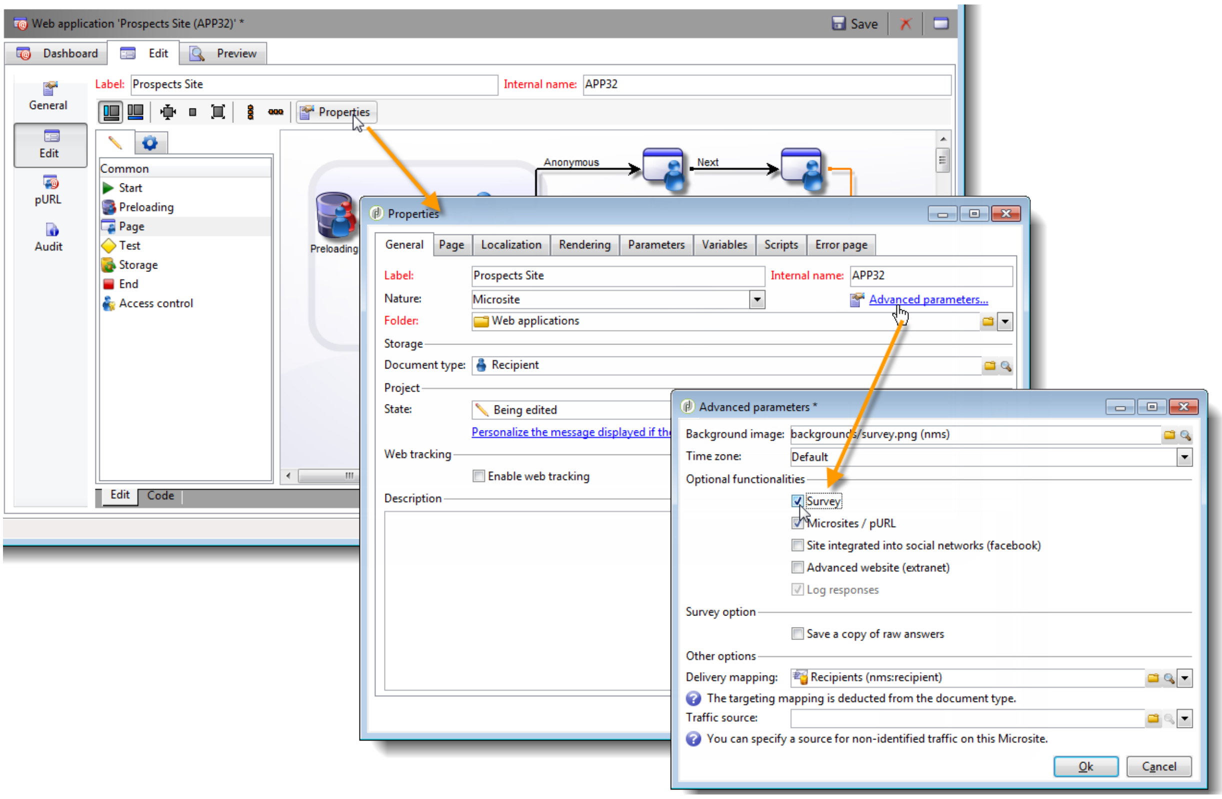
3 Create the pURLs linked to the microsite depending on the available templates (for more on this, refer to Personalized URLs [page 256]),



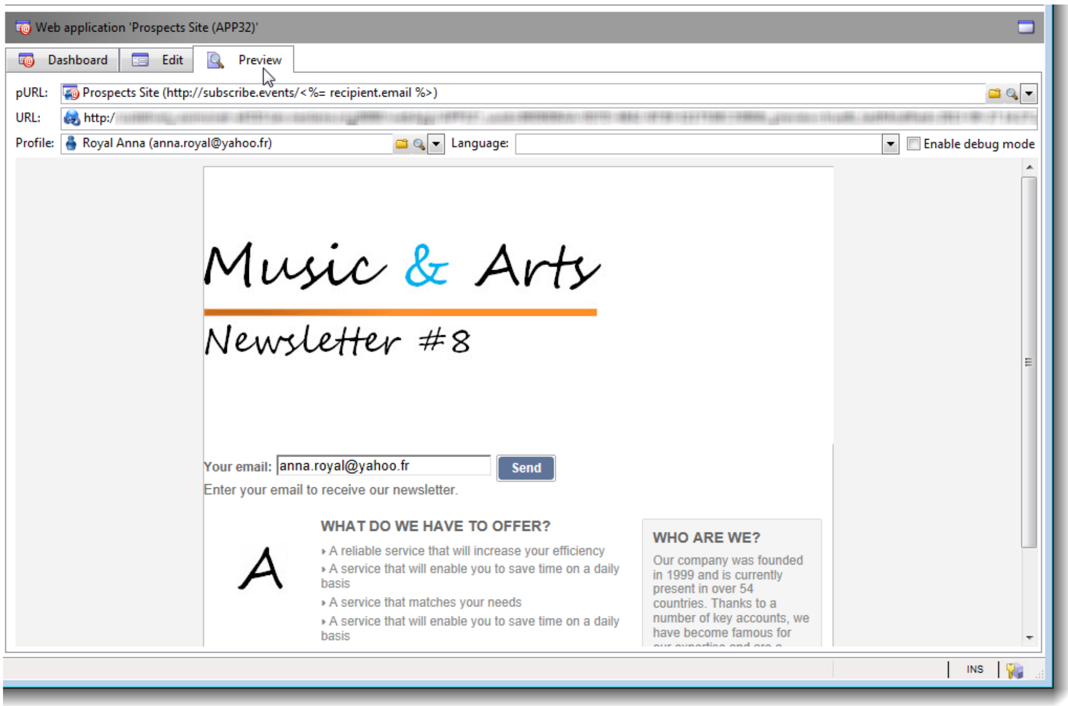
4 Build the site using the objects available in the chart (refer to Creating a microsite content [page 251]),



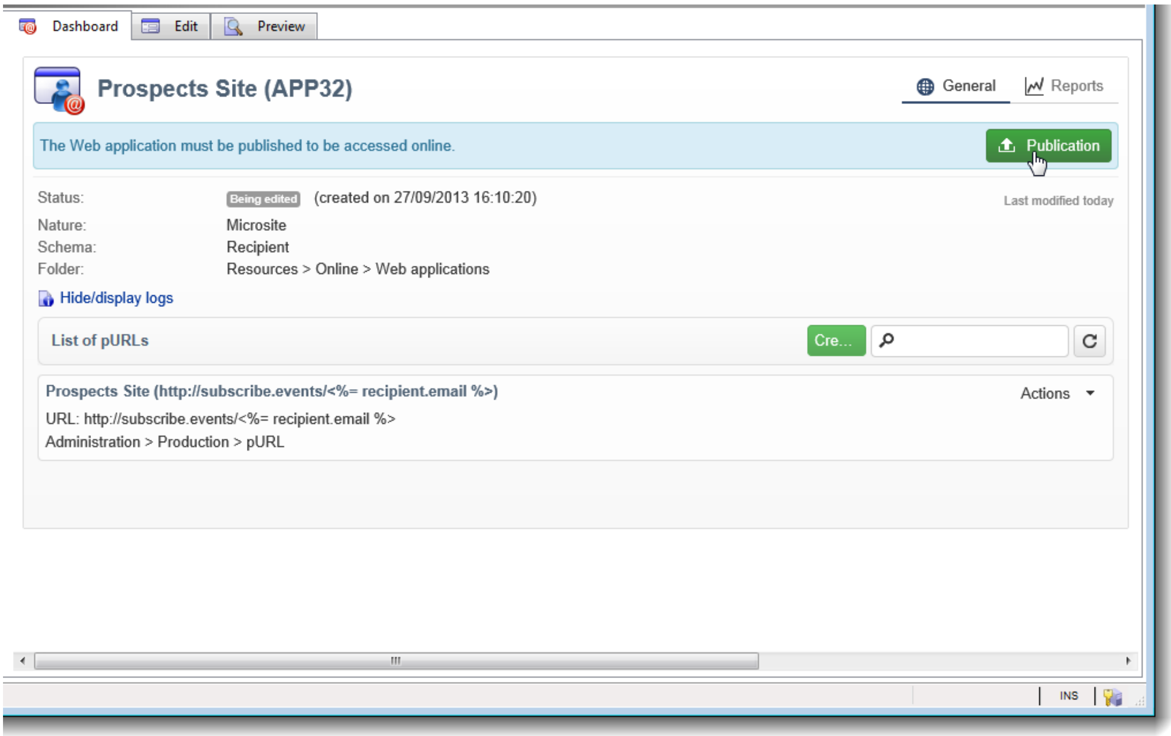
5 Where necessary, add functionalities to your microsite via the **Properties** window,



6 Go to the microsite preview to make sure it works properly,



7 Publish it to make it accessible.



Warning:

Each time you alter the contents of the microsite, you must publish it again in order for changes to be taken into account.

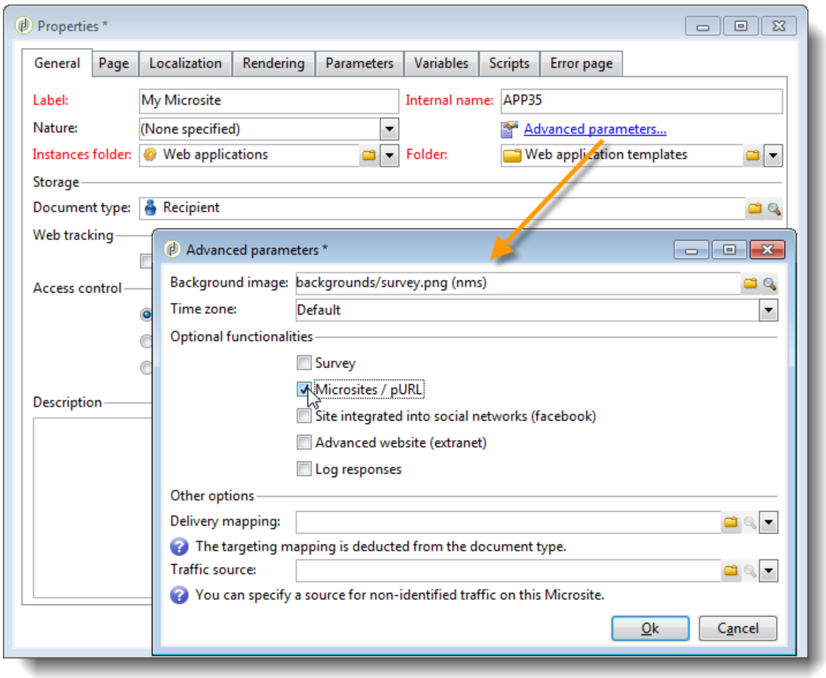
Using a microsite template

Microsites have to be created using a web application template, which contains functionalities specific to personalized URLs. You can duplicate or use the out-of-the-box template provided by Adobe Campaign, or use a previously created template.

To create a microsite template, apply the following steps:

1. Go to the **Resources > Templates > Web application templates** folder,
2. In the list of templates, right-click and select **New** or click the **New** button above the list of templates,
3. Change the label and edit the template properties,

4 Click the **Advanced parameters...** link and activate the **Microsites/pURL** option,



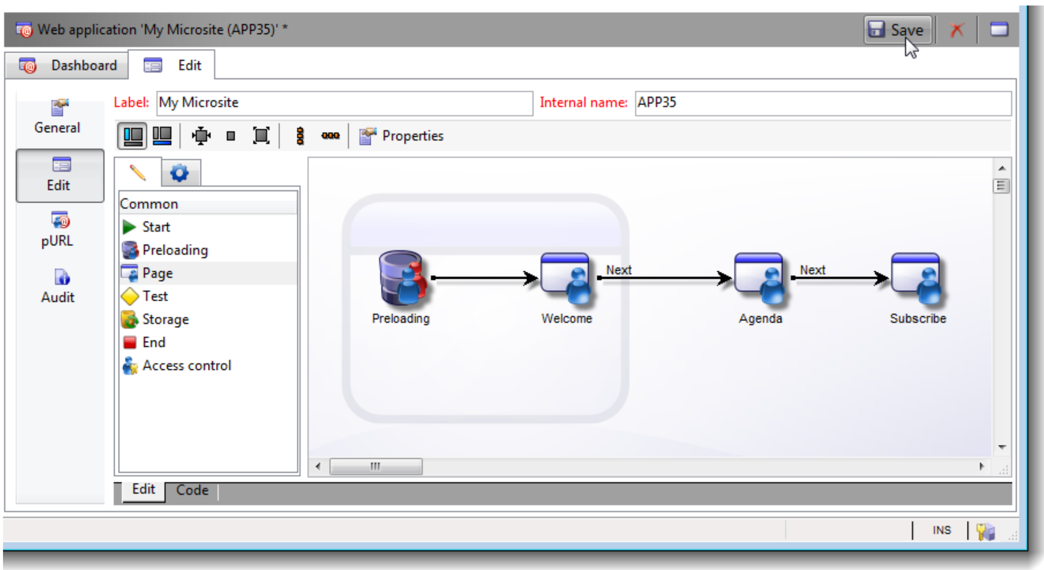
You can also activate other options depending on your needs and your Adobe Campaign applications, such as the **Surveys** or **Leads** modules.

Warning:

Once these options are selected, they can no longer be changed.

5 Save the template.

You can choose to create a template which already contains pages, a pre-loading, access control or rendering box. This will make it easier to create ready-to-use microsites which you can alter as needed.



You can also use the out-of-the-box microsite template provided by Adobe Campaign to create your first site.

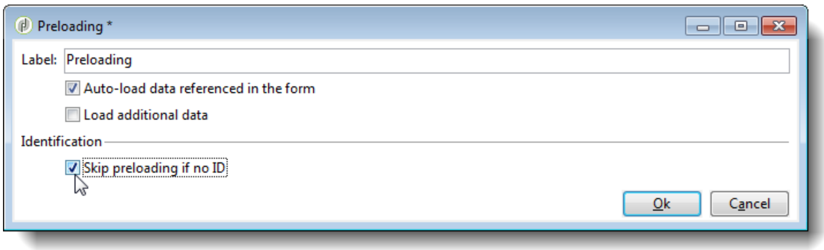
Creating a microsite content

Microsites are made up of several web pages which the recipients of campaigns can access via a personalized URL. For instance, a microsite may include four stages:

1. Greetings/Identity Check page: this page lets you check or update personal information already in the database (refer to Data pre-loading [page 251]),
2. Authentication page: this page enables safe access to the site and is created using the **Access control** activity (refer to Microsite access control [page 251]),
3. Qualification page: this page lets you interact with the visitor, for instance by asking them to take a survey or subscribe to a newsletter,
4. Promise Delivery page: this page lets you confirm the storage of information provided during the previous steps and, if applicable, to make an offer to the visitor.

Data pre-loading

When creating your microsite, you can add the **Pre-loading** activity to your diagram. This activity lets you recover the data of a profile which exists in the Adobe Campaign database. This means that when the guest accesses their site, the fields which contain information on them will be pre-loaded.



Note:

For microsites, Adobe Campaign collects pre-loading information in the following order:

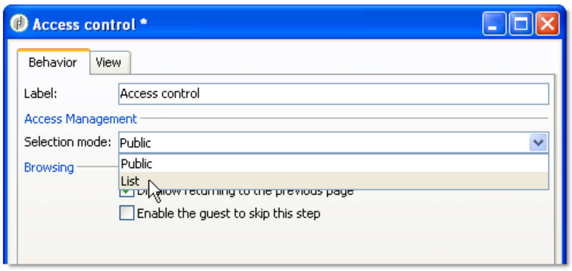
1. Information referenced in the Access control activity (if used).
2. Variable combination **guestID** and **guestCode**.
3. Information contained in the permanent cookie (**uuid230**). This information is ignored during a preview.
4. Information contained in the session cookie (**nlid**). this information is ignored during a preview.
5. **guestID** variable only.

For more on the pre-loading box, refer to Delivering a Web form [page 113].

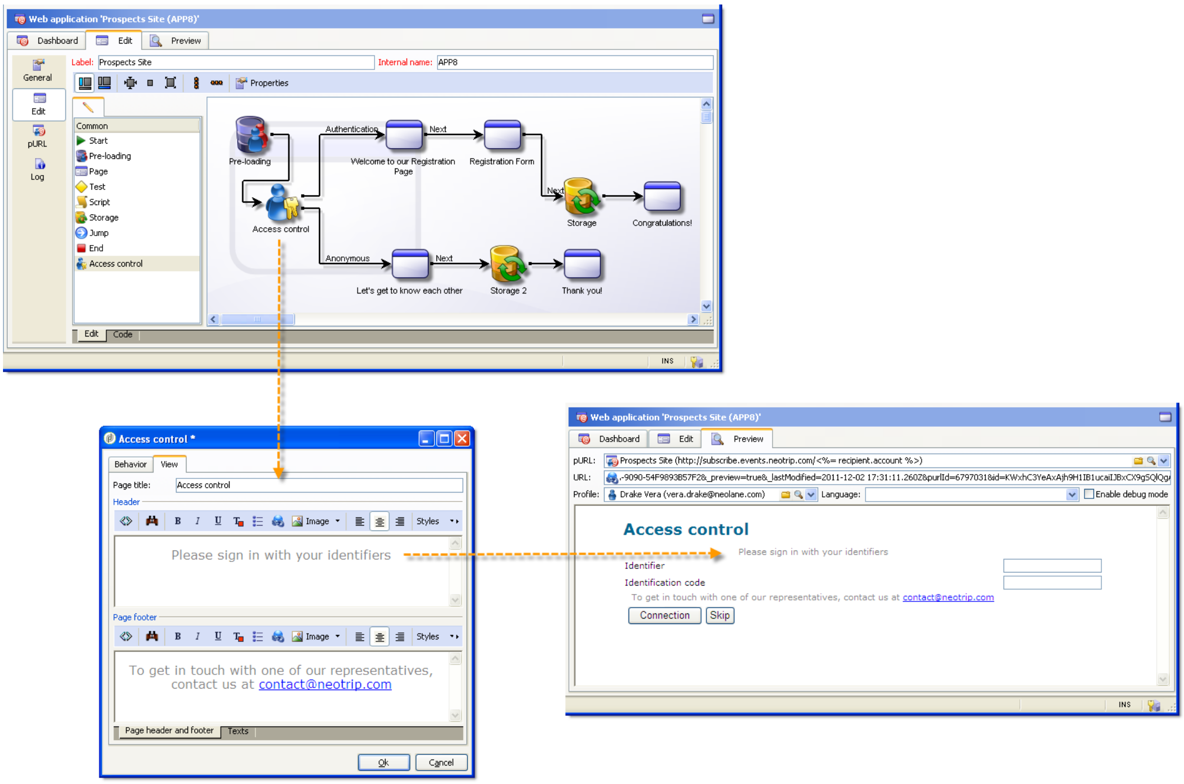
Microsite access control

The **Access control** activity lets you check the guest's identity by asking them to enter an access code. This means that an identifier and a guest code (**$(guestID)** and **$(guestCode)** variables) have been defined in the pURL format and that they are needed to log on to the microsite. The guest code may not always be visible in the URL, but it still needs to have been configured.

Access to the site can be either public or managed using a guest list, depending on what you choose in the drop-down list.



Use the **Display** tab to add header and footer content.

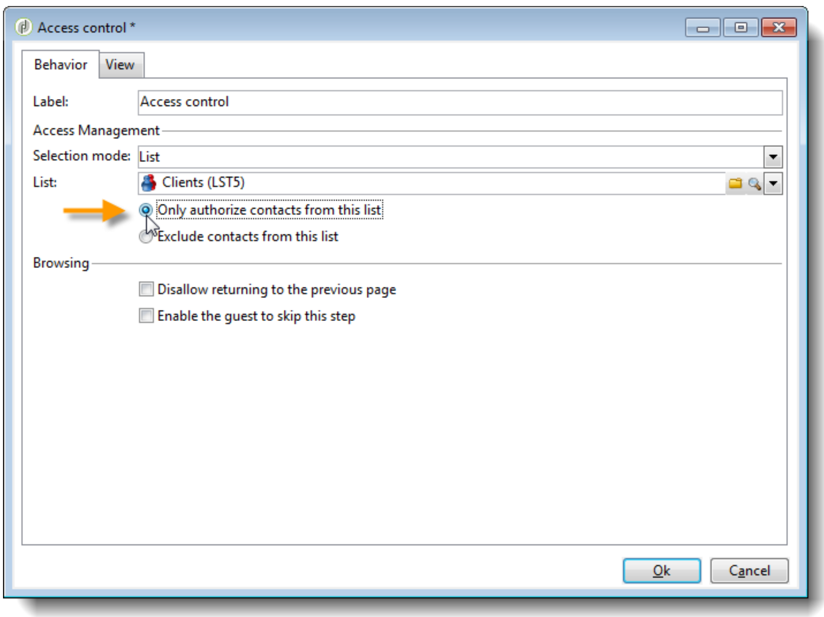


Public access

When the type of access control chosen in the drop-down list is **Public**, this means a guest with an access code (**$(guestCode)**) can log on to any public microsite using the related guest ID (**$(guestID)**).

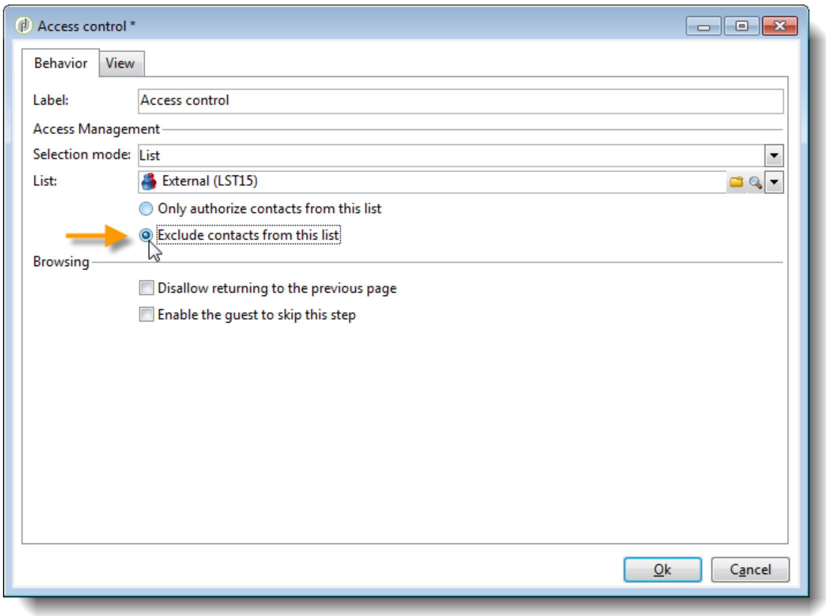
Restricted access to a list

Access control via a list only lets recipients contained in a list log on to the microsite, using the pURL included in the delivery and after identification. To restrict site access to specific people, select the list of recipients in the drop-down list, then click the **Only authorize contacts from this list** option.



You can also define a list of guests to exclude. For instance, if you alter the content of a microsite, you could exclude a list of guests which had access to the previous version of the microsite. since they have the access code, they are likely to want to log on to the site again.

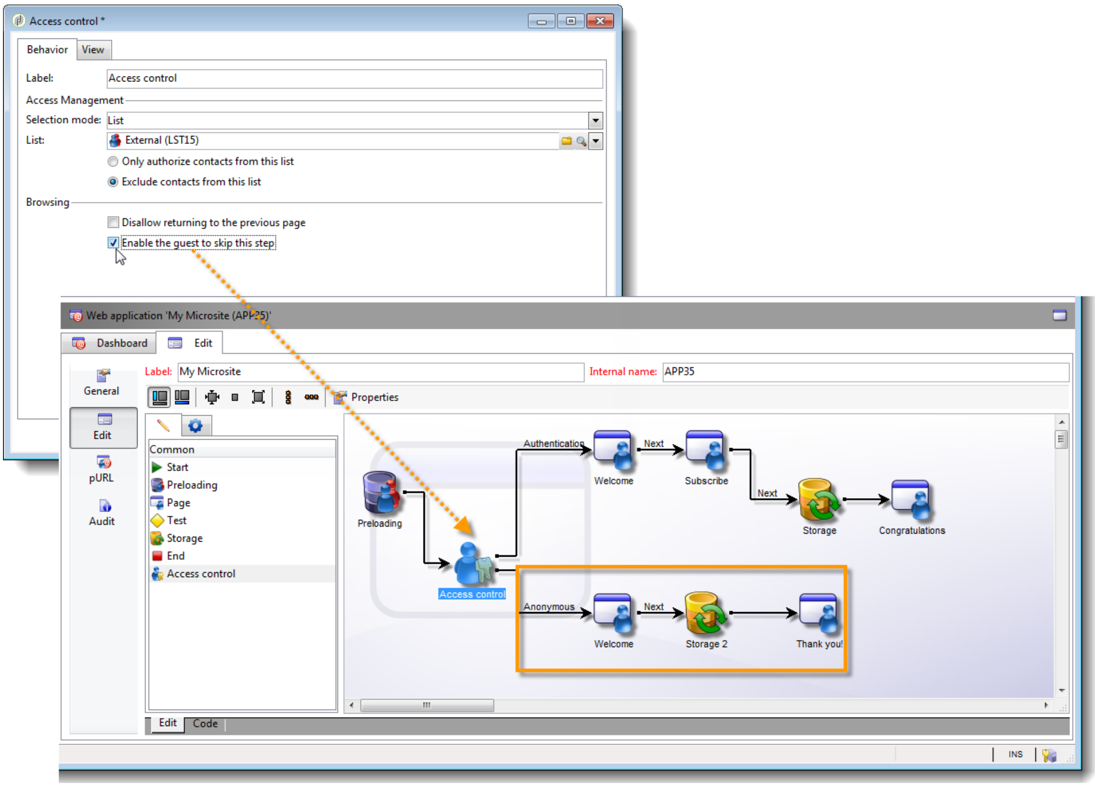
Simply create a list in the **Profiles and targets** > **Lists** folder, then select it in the **Access control** drop-down list of the activity, and choose **Exclude contacts from this list**.



Exclusion per list is a way of increasing the security of microsite access.

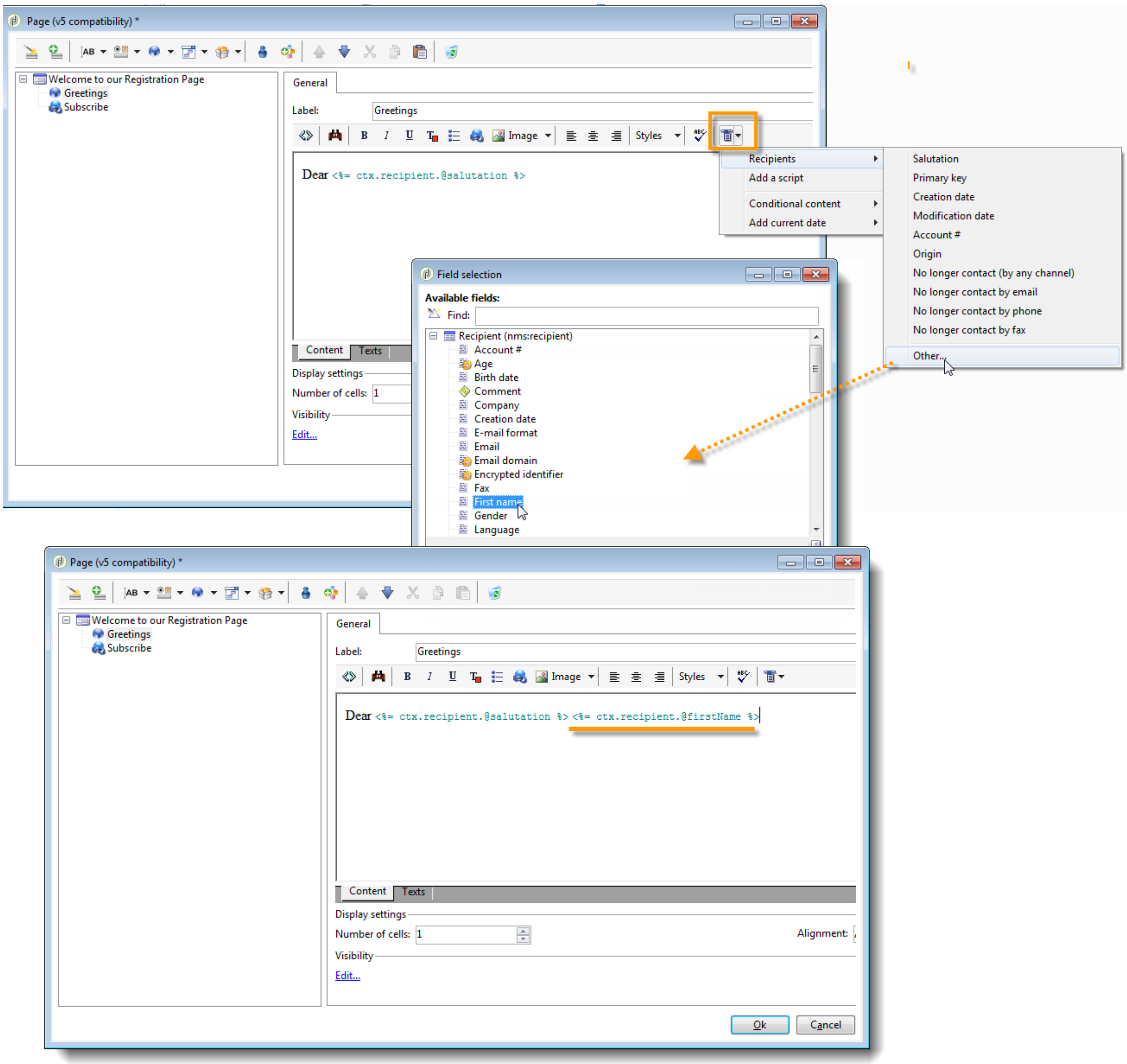
Anonymous access

You can plan to redirect a guest towards specific pages of the microsite if they fail to provide an identifier and access code. To do this, select the **Enable the guest to skip this step** option in the **Access control** activity and add pages to the diagram depending on the information you want them to access.

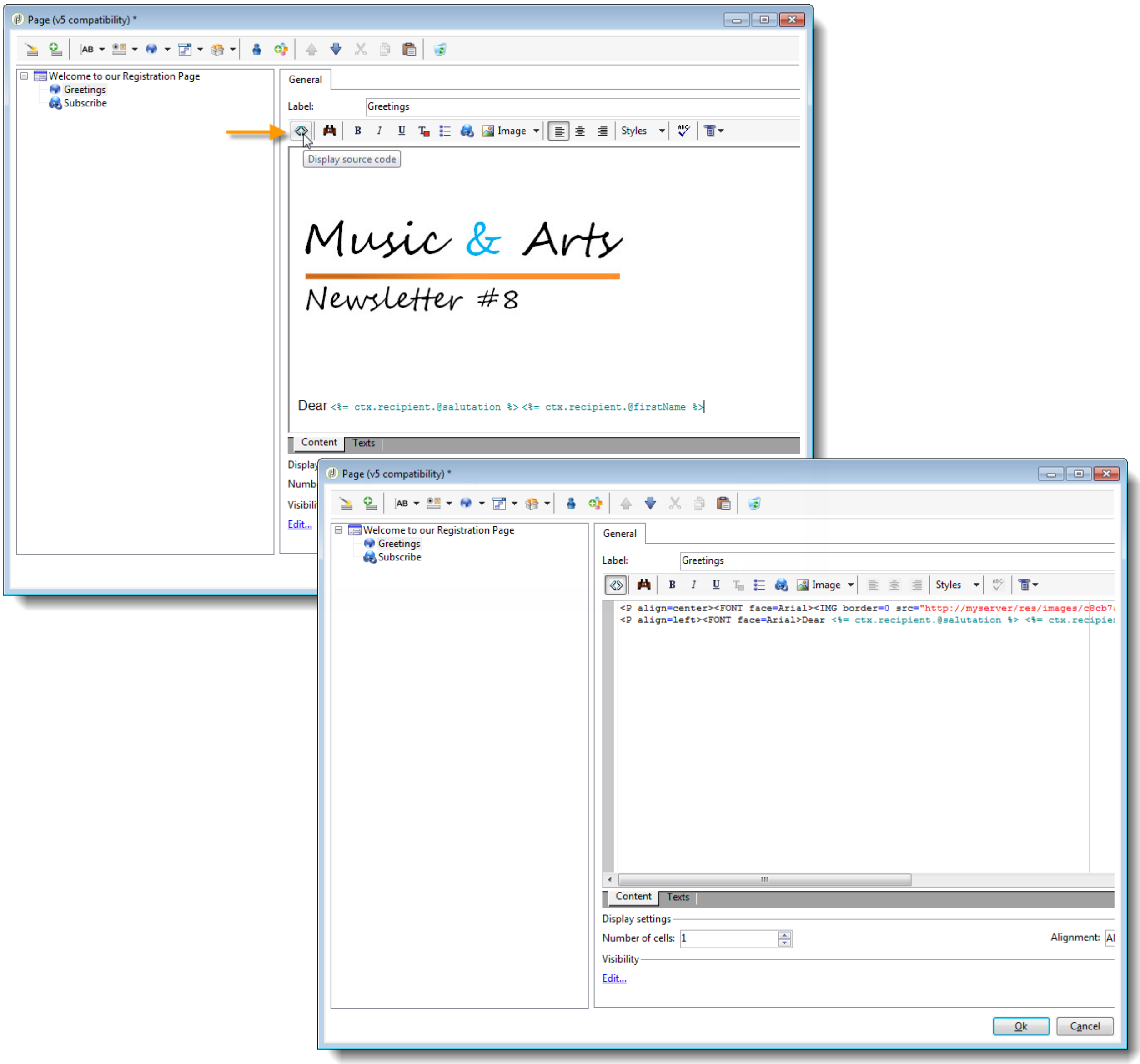


Field personalization

In a **Page** type activity, you can enter text, create a layout and add personalized information using the relevant fields. Add a field in the menu or choose **Other** to select a specific field in the table.



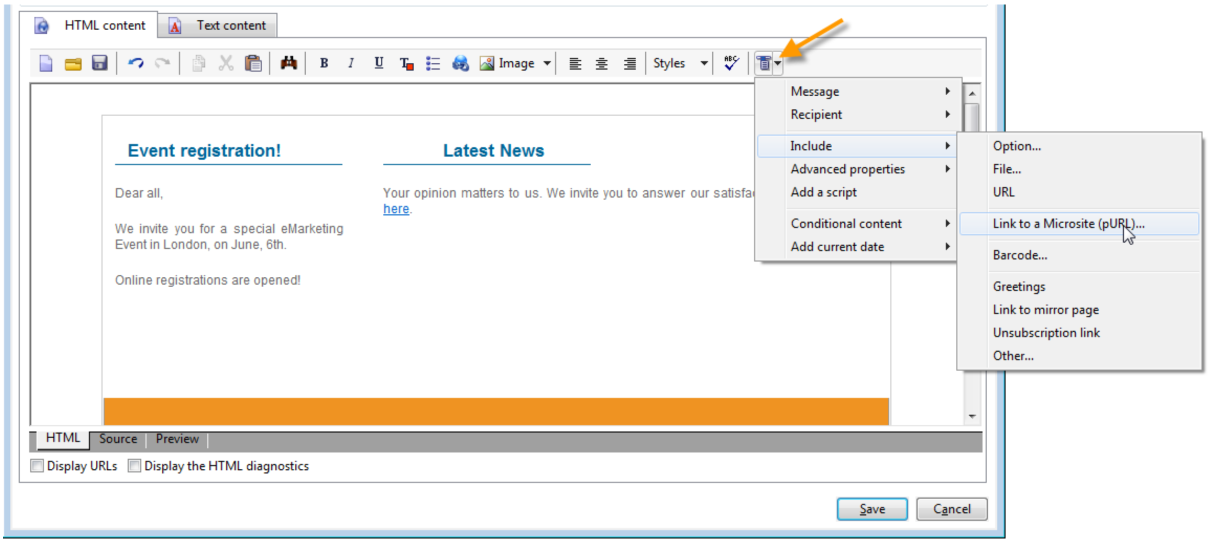
The text entered will be converted into HTML automatically. To check formatting, click the **Show source code** icon.



Personalized URLs

A personalized URL (or 'pURL') is a personalized link that lets delivery recipients access a personalized website. For example, in the message addressed to Mr. Victor Jones, you can insert the following type of link: http://www.adobe.com/victor.jones or https://clients.adobe.net/jones or even http://adobe.client/PRU8ZIE. These types of links can be inserted into email or direct mail deliveries.

To include a pURL in a message, click the personalization button and select **Include** > **Link to a Microsite (pURL)...**.



Refer to Inserting a pURL into an email delivery [page 259].

The personalized URL you want to include needs to be created beforehand and be available to the operator. Refer to Creating a pURL [page 257].

Warning:

To use pURLs in your deliveries, ask your Adobe Campaign administrator to create the adequate configuration beforehand.

The technical prerequisites to using pURLs are detailed in the Installation guide.

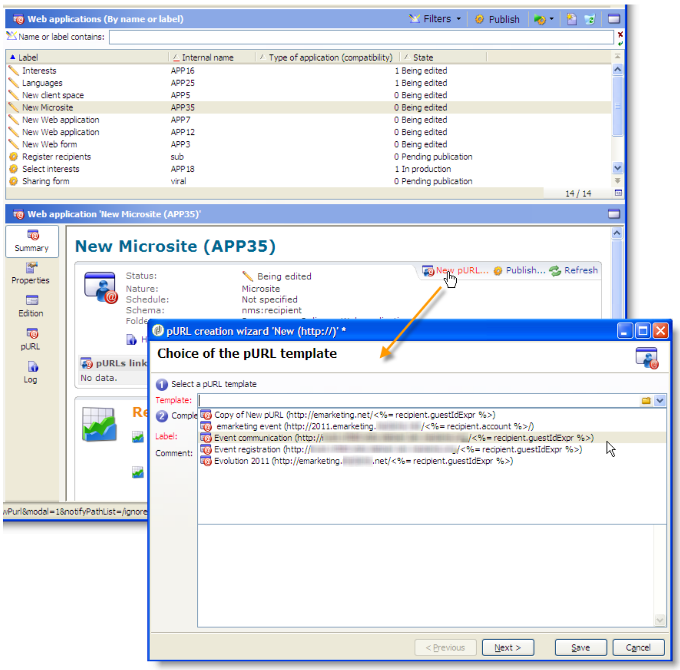
In order to configure pURL templates via the Adobe Campaign platform, the itemized lists linked to the domains need to be created beforehand in the **Administration** > **Platform** > **Itemized lists** node.

Creating a pURL

To create a pURL, apply the following steps:

1. Edit the Microsite which it is linked to.

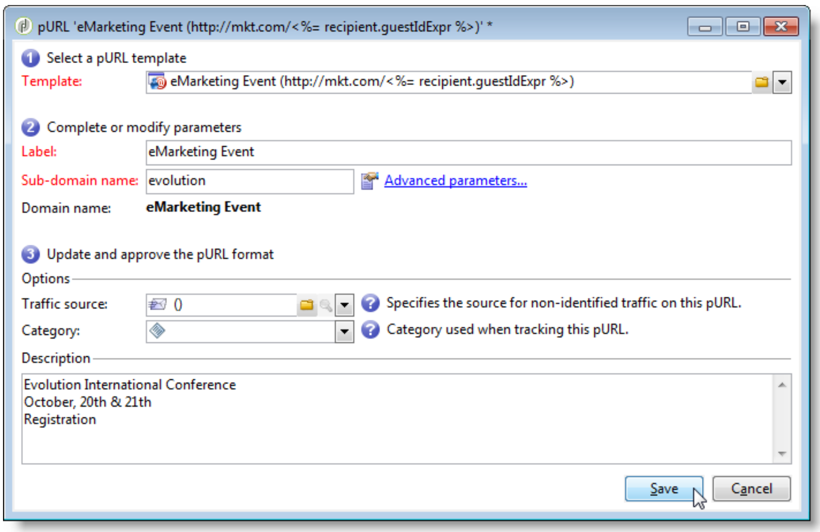
2 Click the **New pURL...** link and choose a pURL template.



Note:

pURL template are detailed in Creating a pURL template [page 234].

3 Enter the pURL settings and adapt the name of the sub-domain.



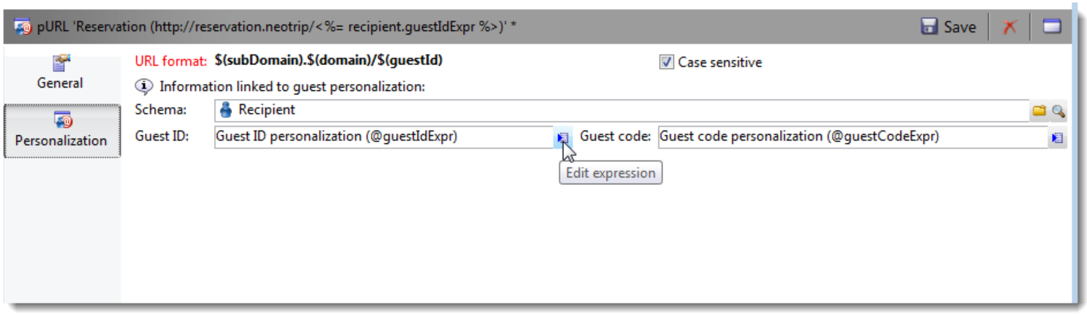
The **Traffic source** field lets you link a default traffic source when the pURL isn't used via a delivery. For more on this, refer to Traffic source.

The **Category** field lets you link a category to the pURL. It is used to create reports on the tracking of URLs visited.

Note:

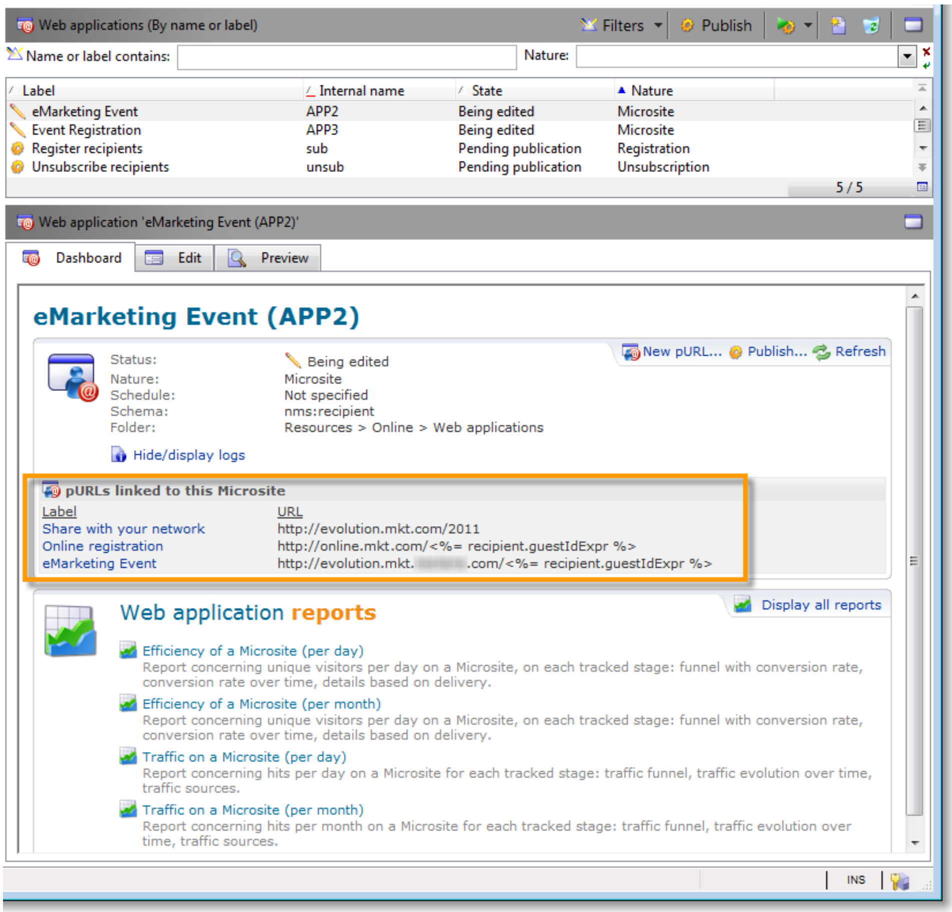
Depending on the configuration of the pURL template use, options may differ from the example above.

4 If necessary, click the **Personalization** link to change information linked to URL personalization.



For more on this, refer to Identifying guests.

5 Click the **Finish** button to approve pURL creation: it is added to the list of available pURLs to access this Microsite. This list is shown on the home page and in the pURL tab of the Microsite.



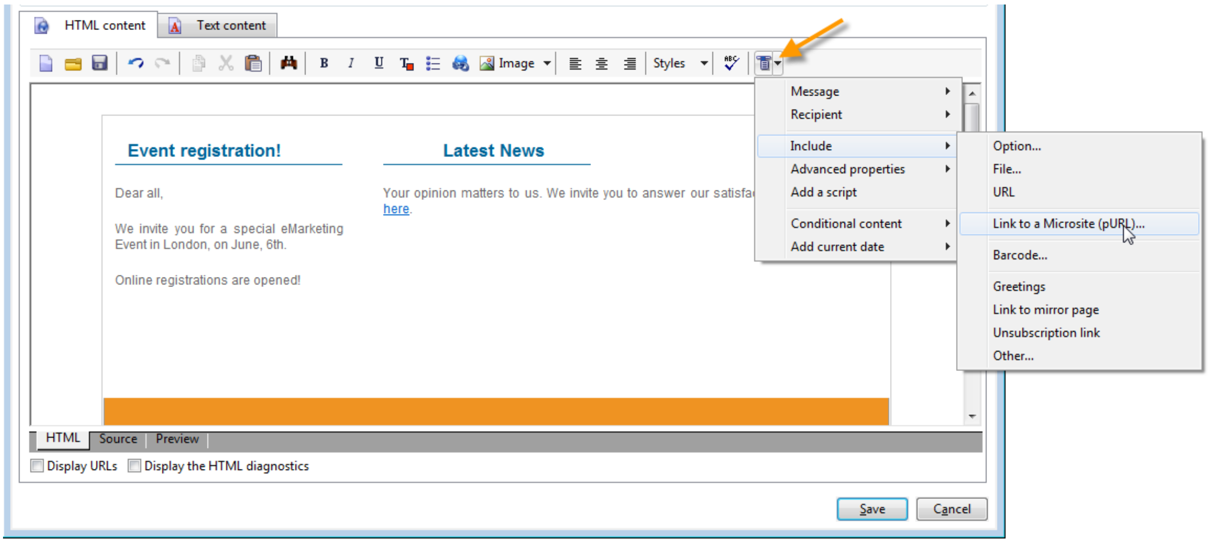
Note:

One Microsite can be accessed via several pURLs. The reports linked to each one let you measure all the access modes used throughout its life-cycle.

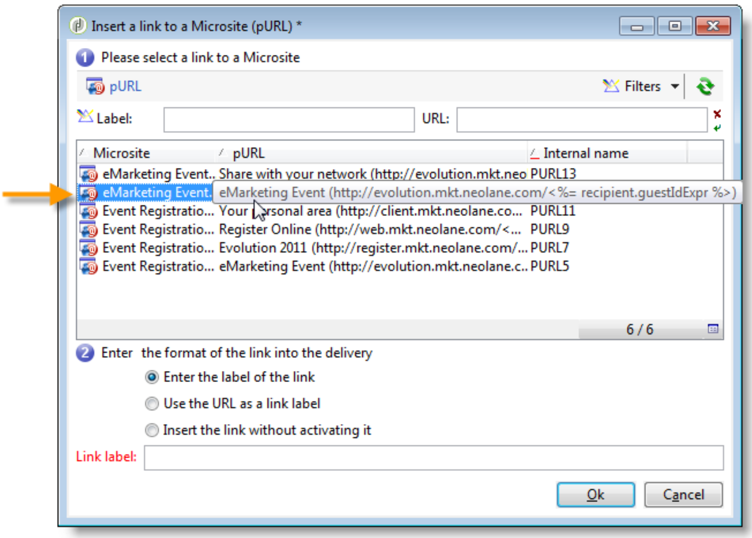
Inserting a pURL into an email delivery

To insert a personalized URL into an email delivery, apply the following steps:

1 Click the personalization button and choose **Include** > **Link to a Microsite (pURL)...**.



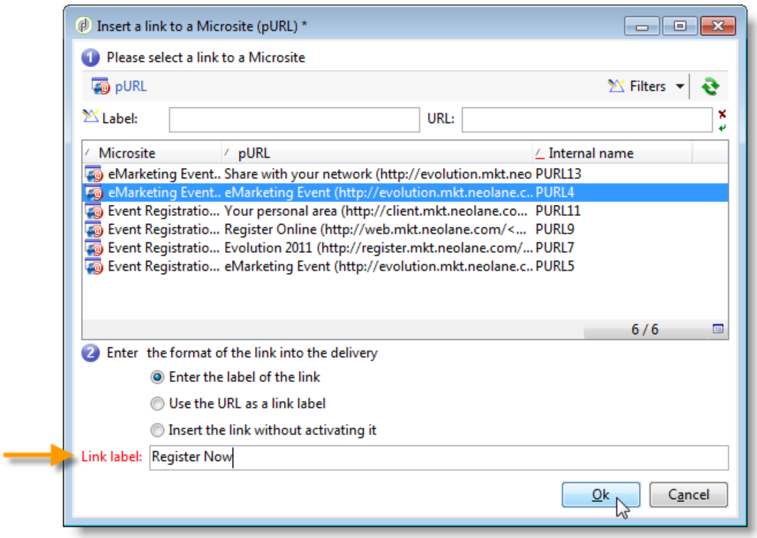
2 Select the pURL you want to insert.



Note:

It's possible to filter the list to display only the pURLs linked to your microsite. To do this, select it in the **Microsite** drop-down list above the list of pURLs.

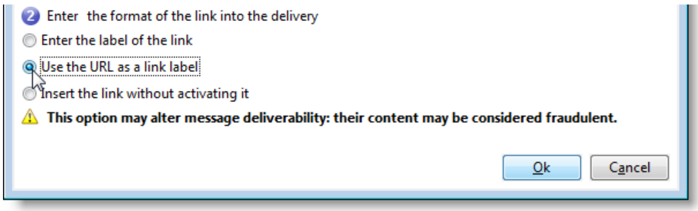
3 Enter the label of the link in the appropriate field.



This configuration inserts a link towards the pURL whose label is the text entered in the matching field into the delivery.

Two other options are available:

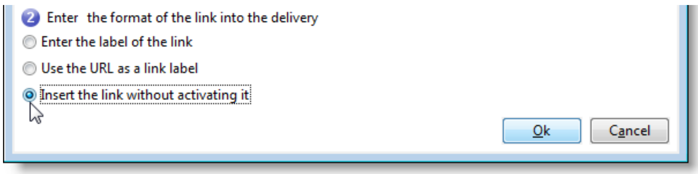
- The **Use the URL as a link label** option of the link lets you display the URL directly in the page.



Warning:

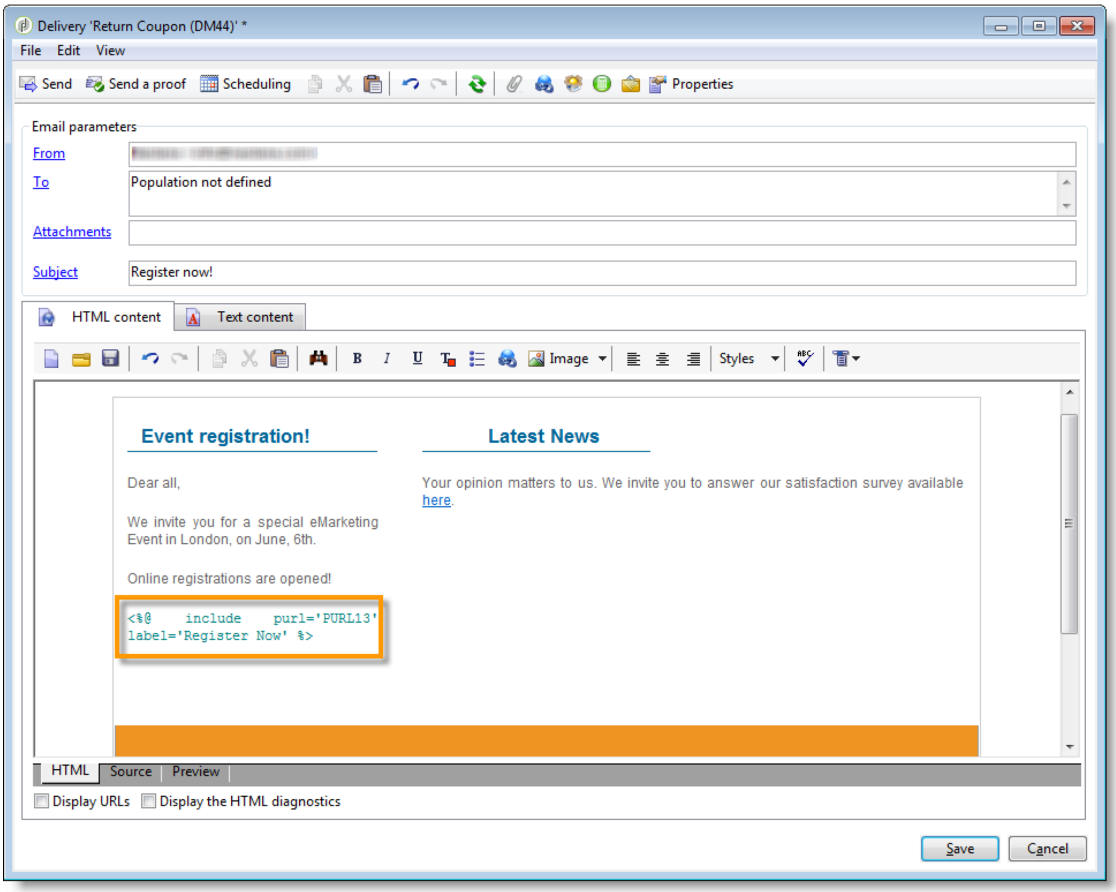
This option may alter email deliverability. When using this option, we highly recommend de-activating tracking on this URL (see below).

- The **Insert the link without activating it** option lets you insert the pURL content into the message without activating the hyperlink to the Microsite.



4 Click **Ok** to confirm the insertion.

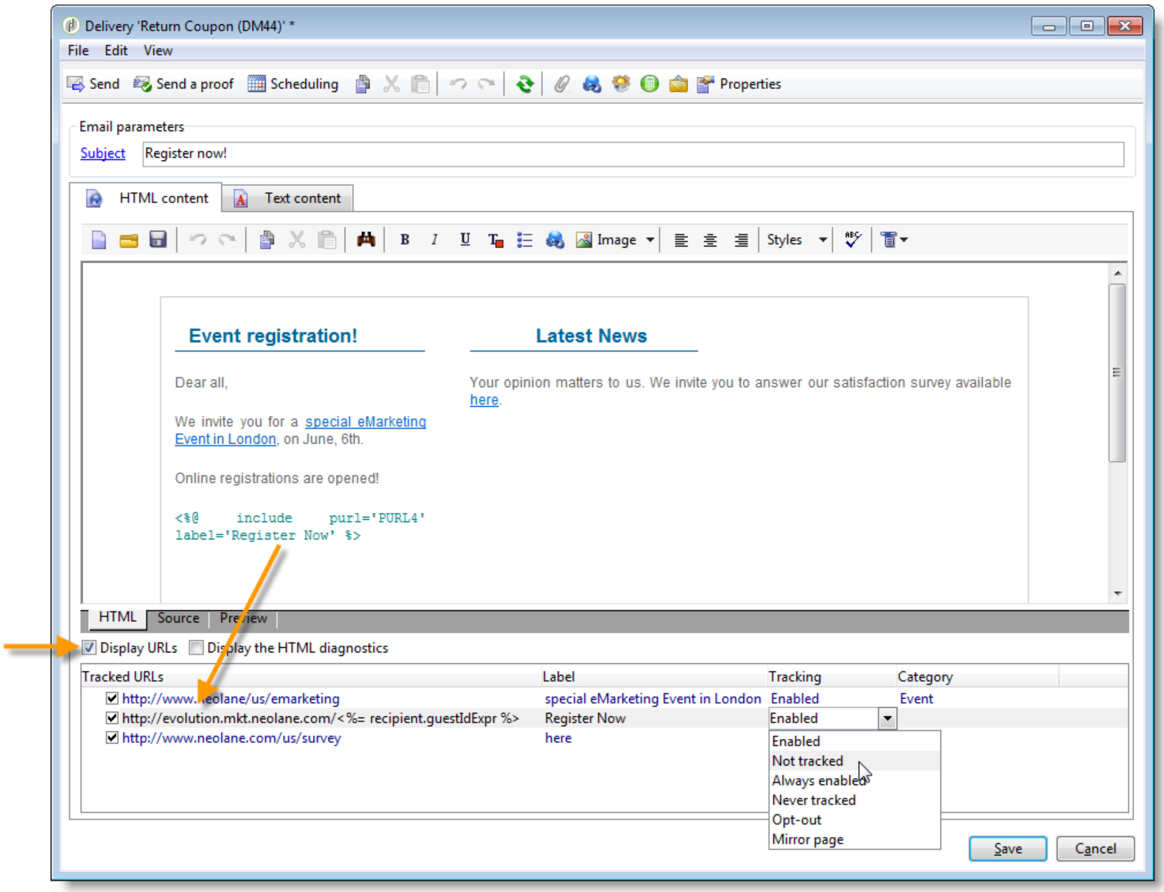
The block for inserting a personalized URL is added to the delivery content.



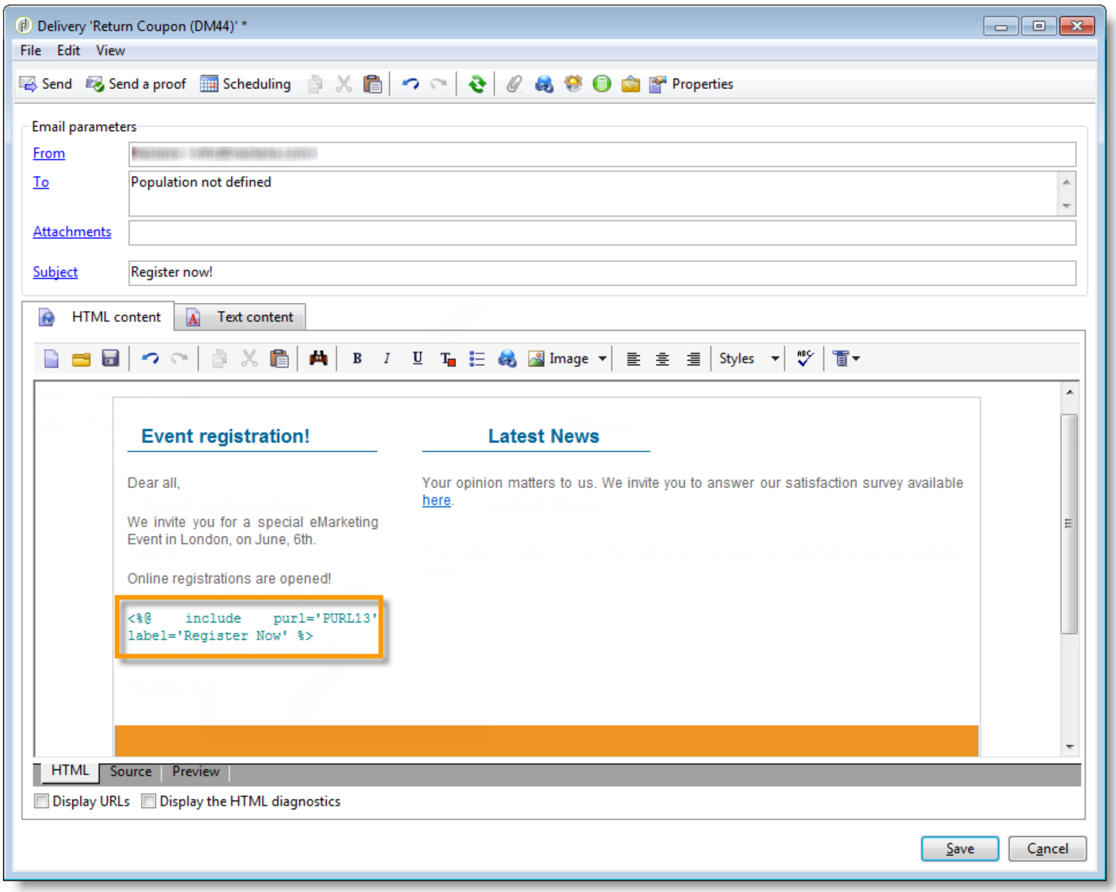
Note:

The **Display URLs** option lets you view the pURLs in the message and add or edit their label and category.

If necessary, you can de-activate tracking on a URL, including when the URL of the link is used as a label, to avoid risks of rejection due to phishing.



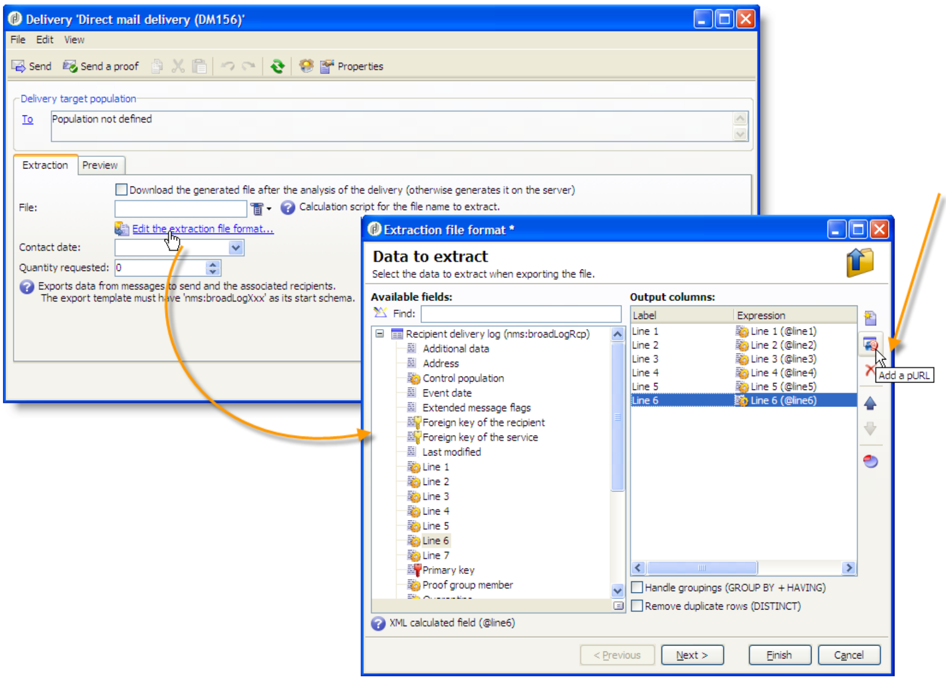
5 Click the **Preview** tab and choose a recipient before you approve the link format.



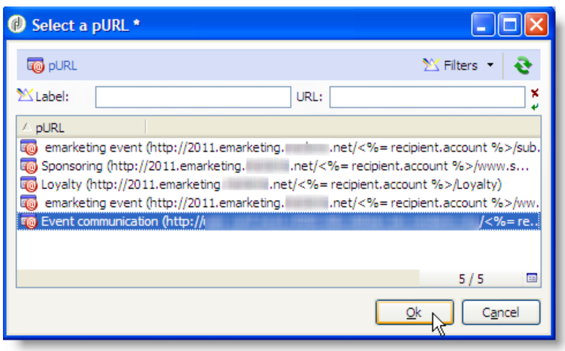
Including a pURL in a direct mail delivery

To insert a personalized URL into a direct mail delivery, apply the following steps:

1 Click the personalization button and select **Include > pURL...**.



2 Select the pURL you want to insert.

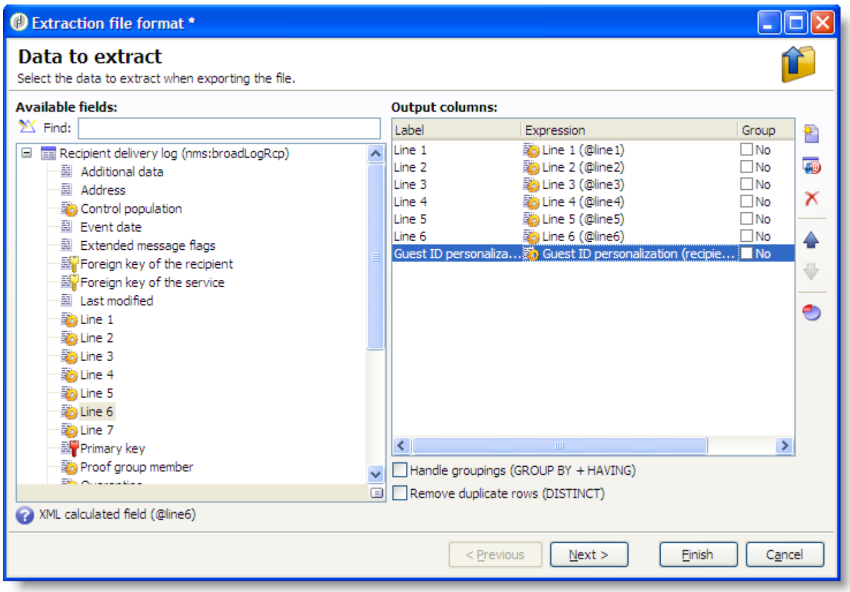


Note:

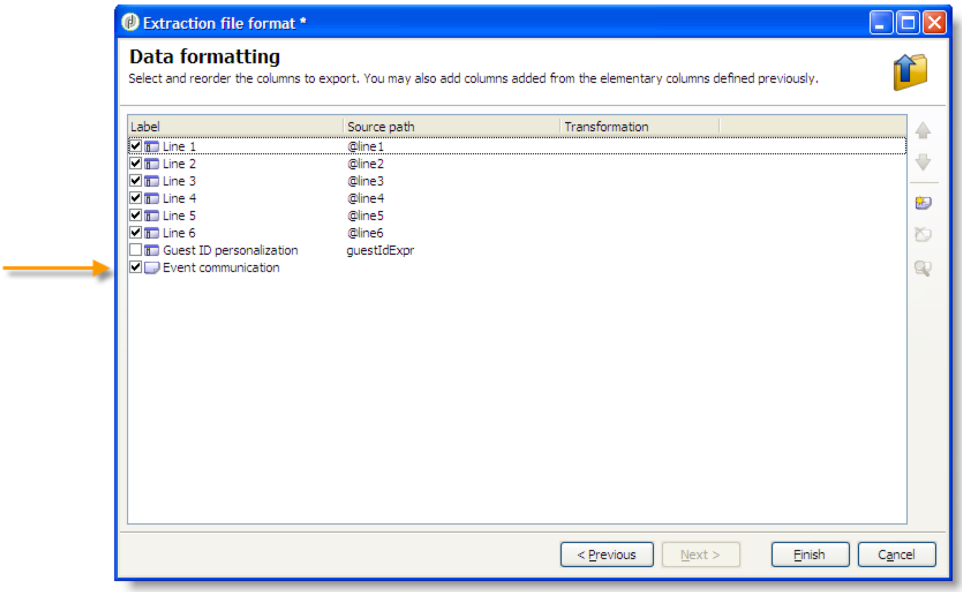
You can filter the list to display only the pURLs linked to your microsite. To do this, use the **Filters** button to display the **By name, label or Microsite** filter and select your site from the **Microsite** drop-down list above the list of pURLs.

3 Click the **Ok** button to approve the selected pURL.

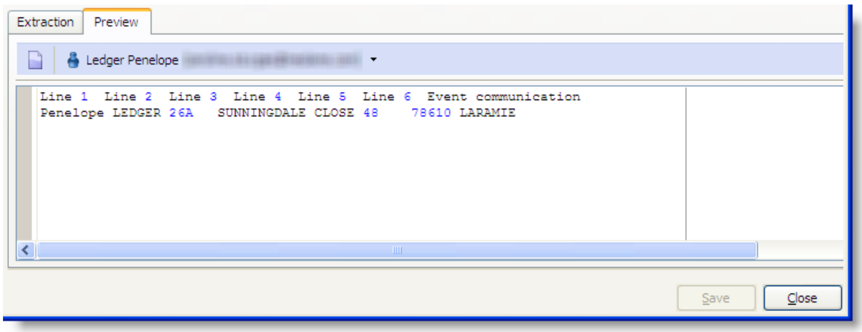
The personalization fields required to build the pURL are automatically added to the list of output columns.



4 Click the **Next** button to configure the data to extract into the output file. In the last step of the wizard, the pURL is identified via a calculated field with a label that matches the pURL, as shown below:



5 Once the extraction file format has been defined, click the **Preview** tab to check the format of the extracted data.



Tracking access to the microsite

Tracking tags

It's possible to track visits to your microsite to find out whether the guest displayed some of the pages or the entire microsite. To do this, simply create a tracking tag for each page. The data recovered is available in the reports of each Web application (refer to Microsite reports [page 272]).

Setting up microsite activity tracking involves the following steps:

1. Defining targets for the microsite,
2. Creating itemized lists to match the targets (power users only),
3. Adding one or more tracking tags in the microsite pages to track the flow of visitors in relation to the targets defined above,

Creating an objective

Warning:

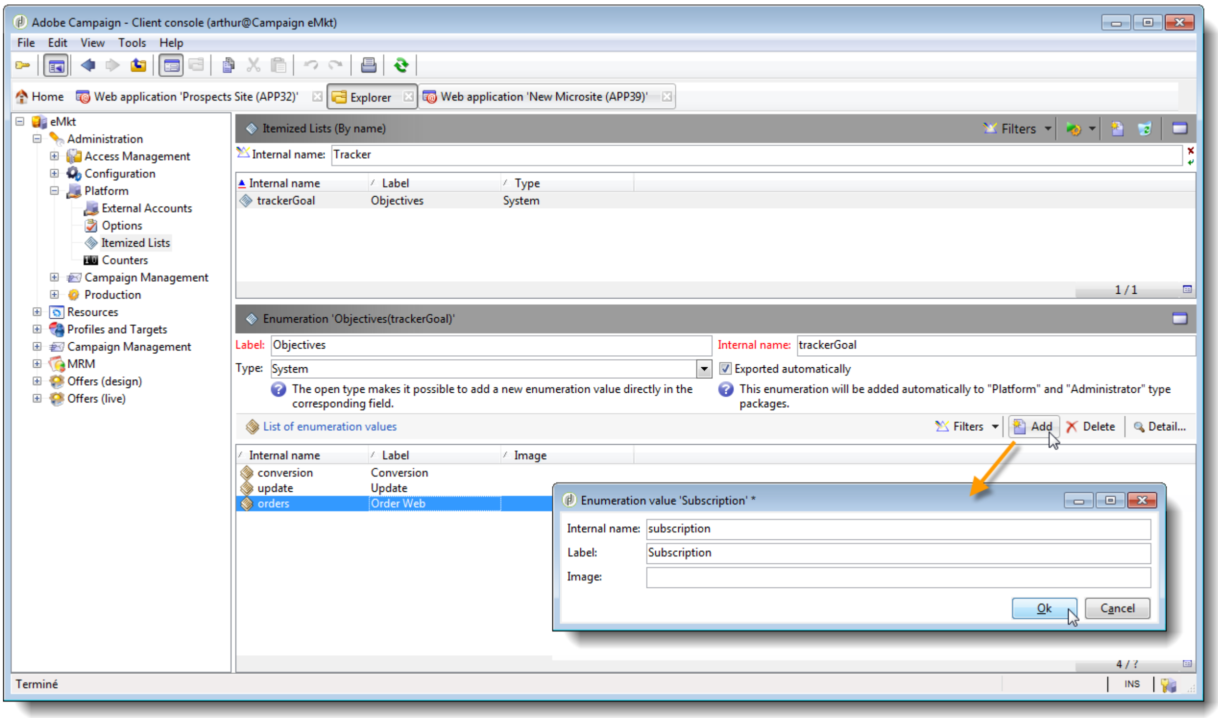
Objective creation involves itemized list creation and must be carried out by the Adobe Campaign database administrator. Once the itemized lists have been created, log off and back on in order for them to be taken into account.

You need to set an objective for each page of your microsite to track guest behavior. For instance, if your microsite has a page for the guest to enter their contact information followed by a page to confirm their subscription to a seminar: your objective will be for the survey to be filled in and the confirmation page displayed.

To create the objectives you want to measure, apply the following steps:

1. Go to the **Administration** > **Platform** > **Itemized lists** folder of the Adobe Campaign tree,
2. Search for the **TrackerGoal** itemized list,
3. Click **Add** to create the desired objectives,
4. Enter a label and an internal name (the label will be displayed in the microsite reports).

In our example, we want to create the **Subscription** Objective, since the point of the microsite is for the guest to save their personal data and register for the Seminar offered.



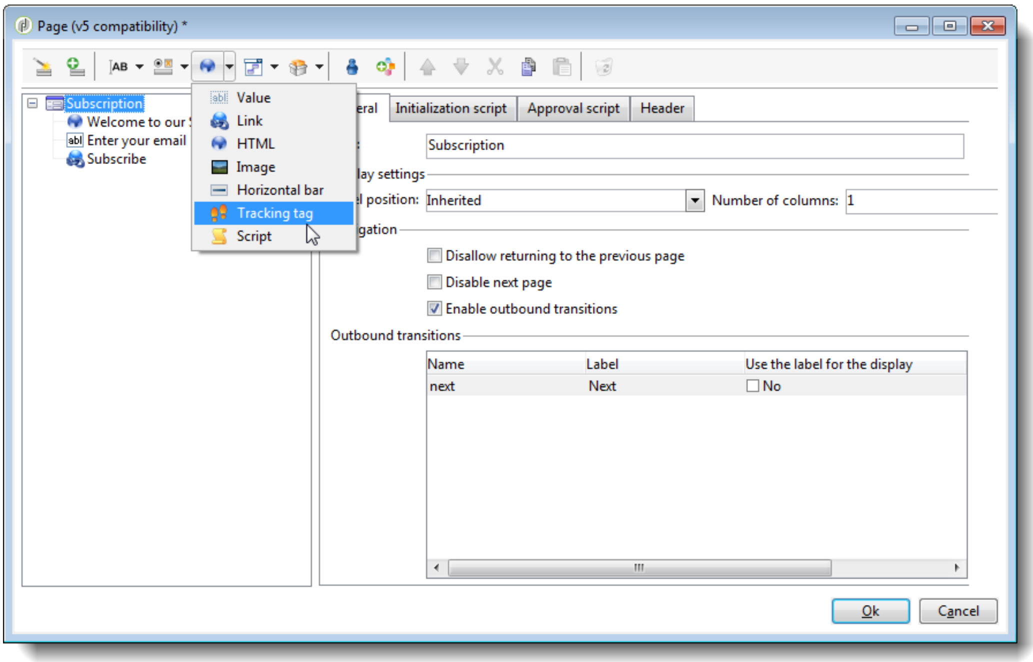
Now that your objectives are created, you can include them in the microsite as tracking tags.

Inserting a tracking tag in a microsite

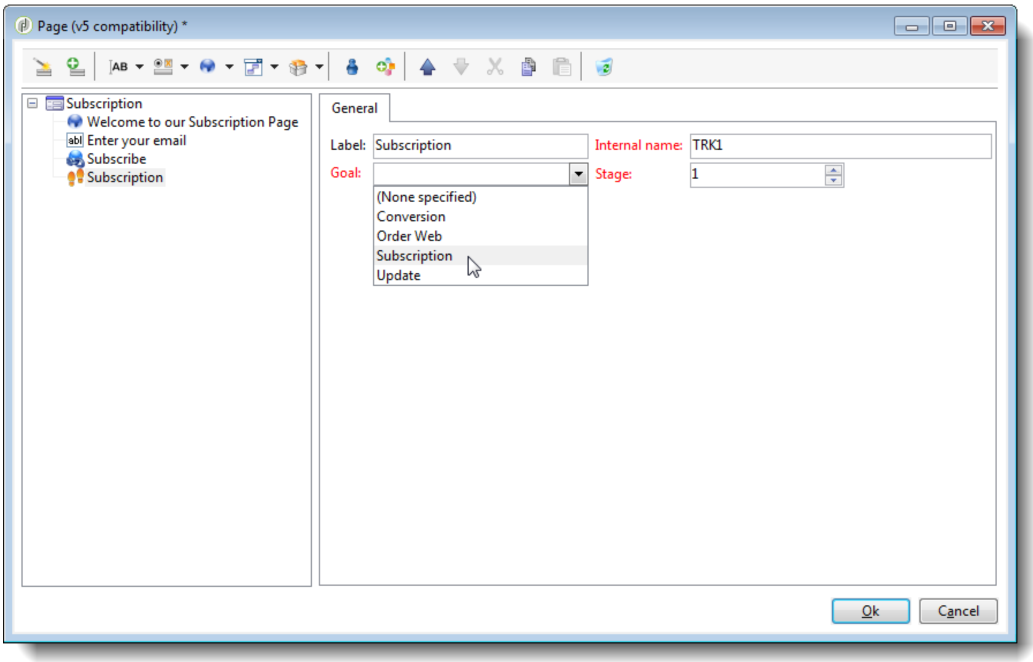
To track accesses to a microsite page, you need to create an objective in the itemized list folder and insert a tracking tag (refer to Creating an objective [page 267]), to do this:

1. Edit your microsite,
2. Open the page for which you want to track activities,

3 Select **Static elements** > **Tracking tag** or use the static element drop-down list.



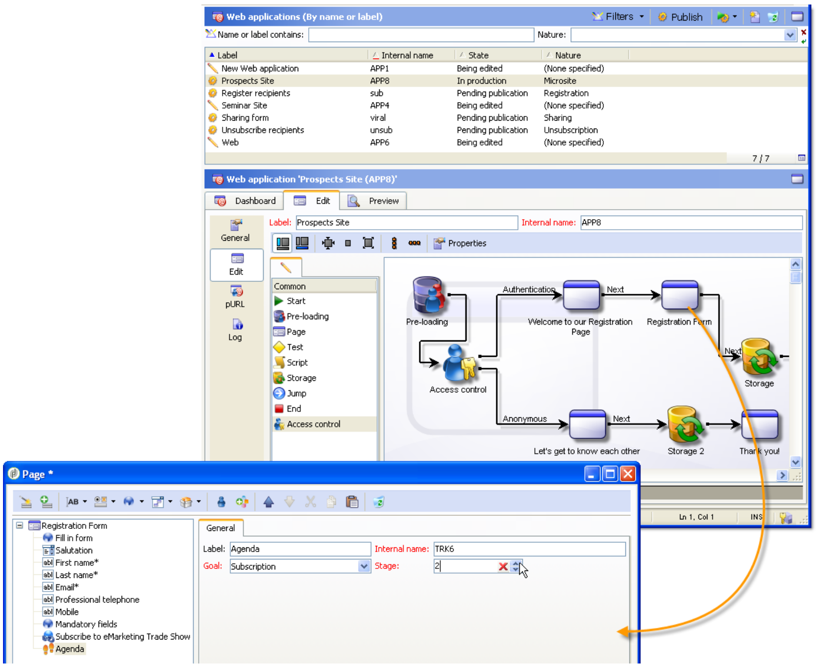
4 In the drop-down list, select the target created above, i.e. **Subscription** (refer to Creating an objective [page 267]),



5 Choose which stage the tracking should apply to (stage 1 for the first page of the site in our case),

6 Change the label to be shown in reports,

7 Repeat for each page of the microsite (**stage 2** for the second page of the site and **Subscription** in our example).

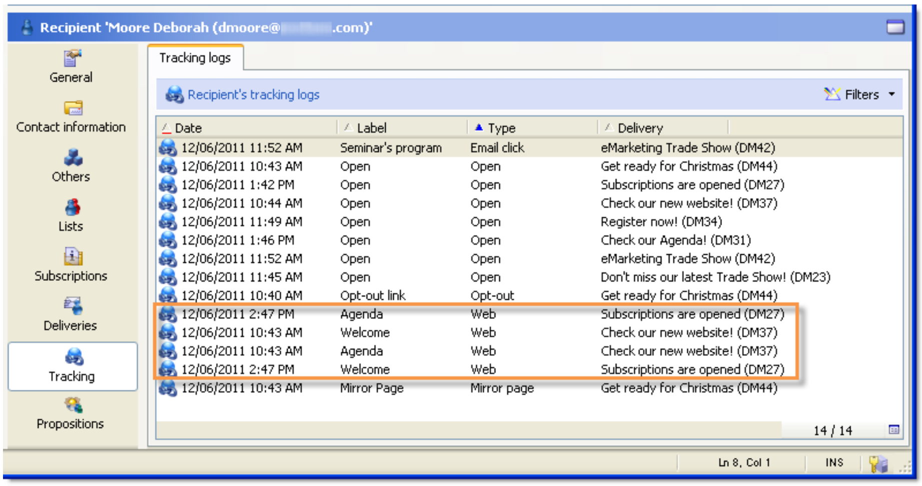


⚠ **Warning:**

Each time you alter the contents of the microsite, you must publish the application again in order for changes to be taken into account.

Tracking guest behavior

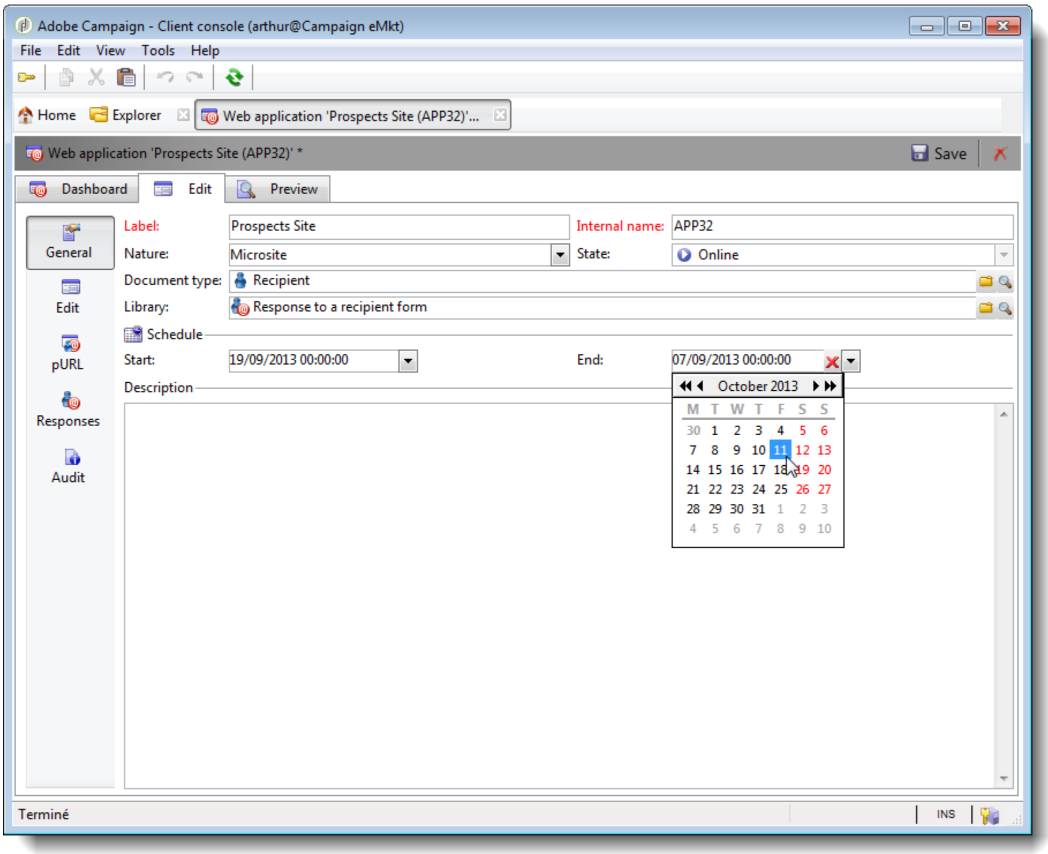
The behavior of guests on the microsite (page display, field entry, subscription to a service, etc.) can be tracked thanks to tracking tags placed on the pages of the site and stored in the Adobe Campaign database. This information is available in the **Tracking** tab of the concerned profile.



Expiration date

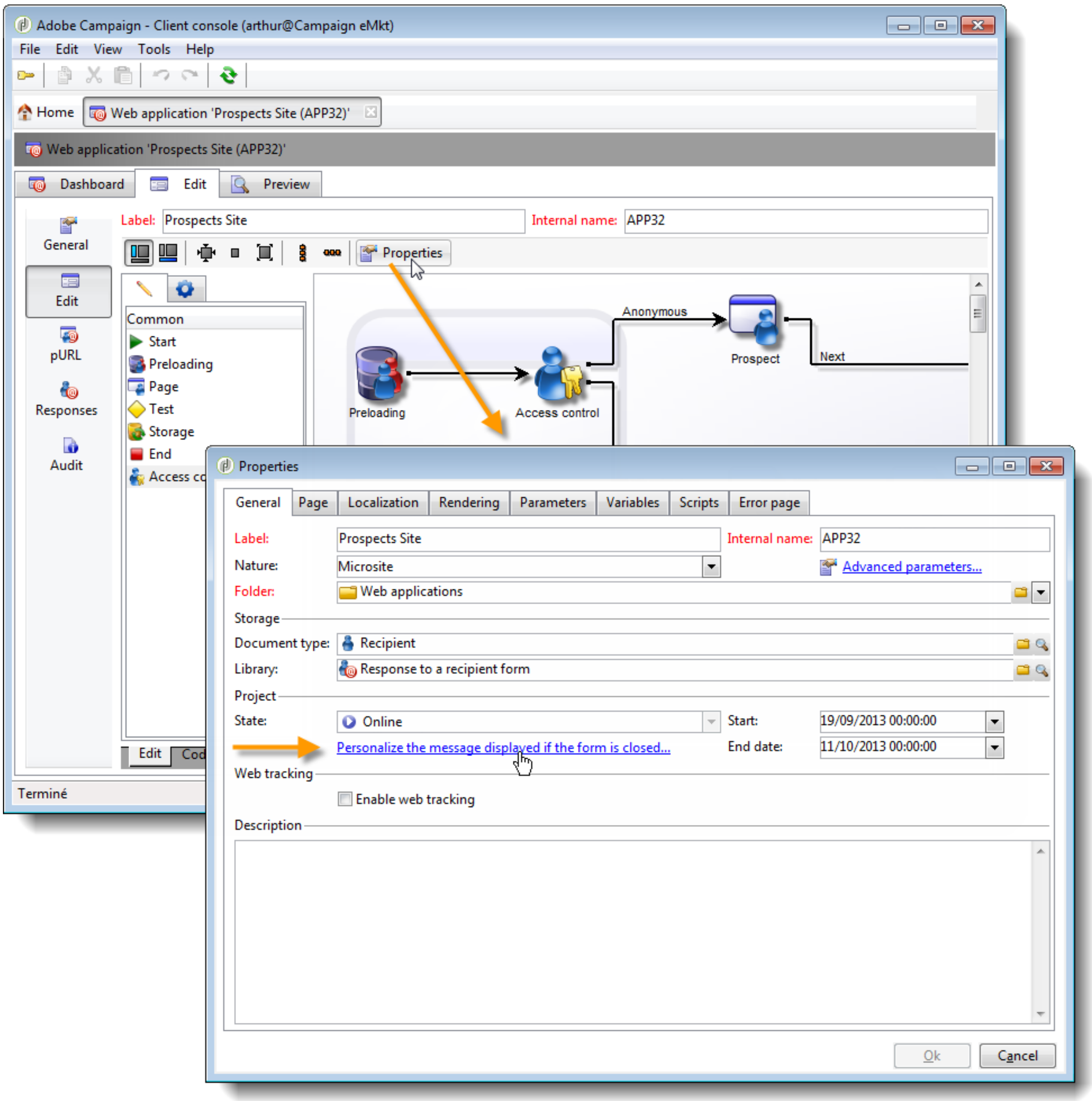
You can specify an expiration date for a microsite: it will only be accessible during the period specified.

To do this, use the **Start** and **End** fields in the **Schedule**, in the **General** tab.



If an operator access a microsite outside of this period, the closed page will be displayed.

The content of this page is defined from the corresponding link which can be found in the microsite properties.



You can also refer to Accessibility of the form [page 127].

Note:

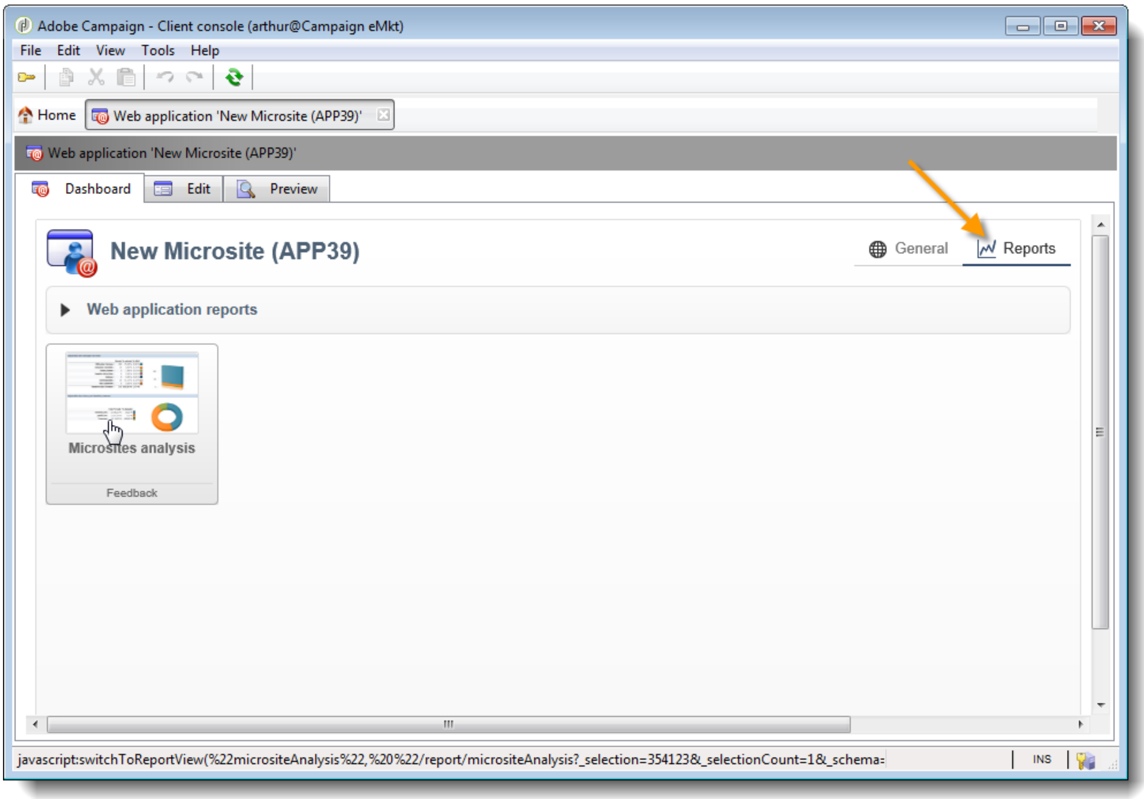
After publishing a microsite, all the Adobe Campaign platform pURLs are also republished: Adobe Campaign therefore checks the validity of each pURL. pURLs that are no longer valid (those that link to closed microsites) are deactivated: if an operator tries to access a closed microsite via one of these pURLs, an error page is displayed.

In the deployment wizard, you can delay the invalidation period of pURLs in order to extend the amount of time the closed page is displayed for this type of configuration, and avoid displaying an error page.

For more on this, refer to the Installation guide.

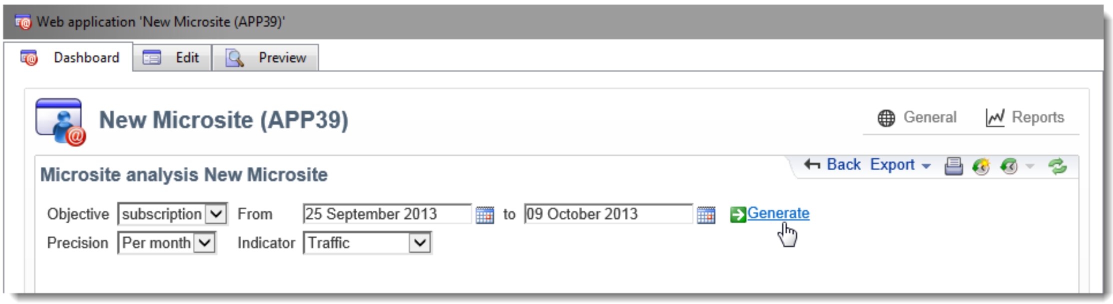
Microsite reports

The site activity can be viewed in the microsite reports. These are available via the microsite summary page in the **Resources** > **Online** > **Web applications** folder by default. The tracking tags inserted into the site pages let you find out which pages of the site (or stages) have been displayed, whether the site was browsed entirely, the number of displays, etc. They let you recover data on the microsite's traffic and efficiency. Reports are updated daily thanks to the **Aggregate calculation per day/month** technical workflows accessed via the **Objects created automatically** > **Aggregation workflows** folder (refer to the Workflows guide for more on this).



To display report data, click one of the available reports:

1. Select the microsite target from the drop-down list,
2. If necessary, restrict the time period using the calendars,
3. Click **Generate** to display the result.



Microsite efficiency

This report lets you count the number of visitors who browse the entire microsite and for whom the target is reached, as well as those who only display part of the site and stop before they get to the last page.

The report indicators are:

- **Global conversion rate**: percentage of visitors who reached the selected target since the microsite was put online.
- **Conversion rate for the period**: percentage of visitors who reached the selected target according to the dates defined using the calendar fields.
- **Visitors per stage over time**: number of visitors for each stage of the microsite per day or per month.

- **Visitor conversion rate over time**: evolution of the visitor conversion rate as a percentage per day or per month.
- **Visitor origin**: number of visitors per stage of the microsite and per origin (delivery received, for instance).
- **Full details**: number of visitors per stage of the microsite, per origin, day or month.

Traffic on a microsite

This report measures the number of times a page containing a tracking tag is displayed (hit), including people who display the same page several times in a row by refreshing it.

The report indicators are:

- **Hits on the first stage (global)**: number of times the first stage of the microsite was displayed since the site was put online.
- **Hits on the first stage (for the period)**: number of times the first page of the microsite was displayed based on the dates defined using the calendar fields.
- **Hits per stage over time**: number of times the various stages of the microsite were displayed per day or per month.
- **Traffic sources**: number of times the various stages of the microsite were displayed, depending on visitor origin.
- **Full details**: number of times the various stages of the microsite were displayed per day or per month, depending on visitor origin.

Case study

The Neotrip company manages the Valentino hotel chain, which has just opened a hotel in Paris. To promote the opening of this new hotel, Neotrip wants to send email invitations to its most loyal customers. The delivery will include a link to a site created for the event. The goal of the website is to promote the new hotel, collect customer preferences for their future travel destinations via a survey, and offer a 5% discount on future bookings.

In order for your microsite to function, there are some technical prerequisites:

- The Microsites module must be installed,
- The Survey Manager must be installed,
- Your DNS infrastructure needs to be changed in order for the *valentino.com* domain and the *paris.valentino.com* sub-domain to be taken into account.
- The *valentino.com* and *paris.valentino.com* domain and sub-domain need to be added to the configuration file of the instance (**config-***<instance>***.xml**),
- Configuration of the tracking server via the platform options or the deployment wizard,
- Choice of the pURL publication mode via the deployment wizard,
- Creation of microsite tracking targets via the itemized lists on the platform.

Once these configurations are complete, you can create your microsite and the URLs for accessing it, then start setting up the campaigns.

Creating a pURL template

Personalized URL with a guestID, without a visible guestCode.

This example shows us how to configure a pURL for email deliveries.

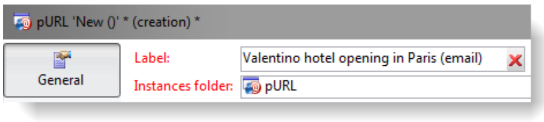
The URL of the microsite which recipients will be directed to will be as follows: *http://paris.valentino.com/resa/<recipient ID>*. The pURL format defined in the template will include a sub-domain, a domain, a website name and a guest ID that matches its ID in the database.

Also, to secure access to the microsite, the guest will be asked to enter a code (their account number) to be authentified. The guest code will not be visible in the URL of the website. The name of the sub-domain will not be specified, this way the person who will link the pURL to the microsite will be free to choose its name.

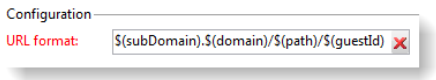
To create the pURL, apply the following steps:

1. Go to the **pURL templates** folder and click **New**.

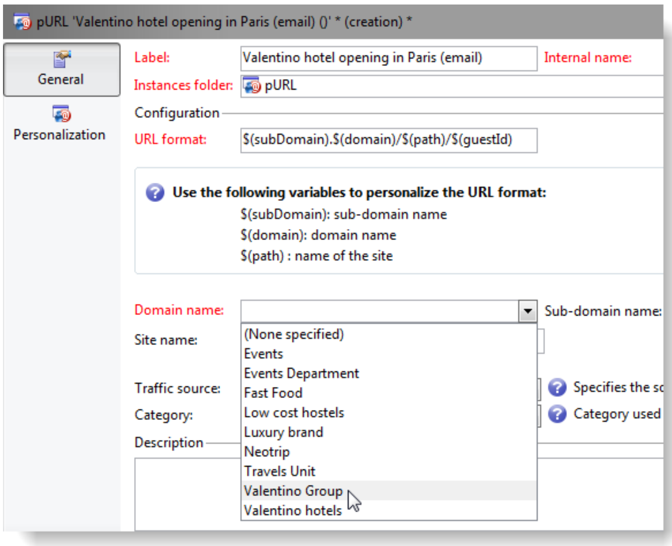
2 In the pURL creation window, change the label to: `Valentino hotel Opening in Paris (email)`



3 In the **URL format** field, enter the format: `$(subDomain).$(domain)/$(path)/$(guestId)`



4 Select the domain name: `Valentino group`

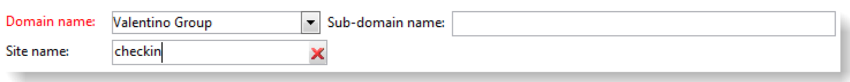


Tip:

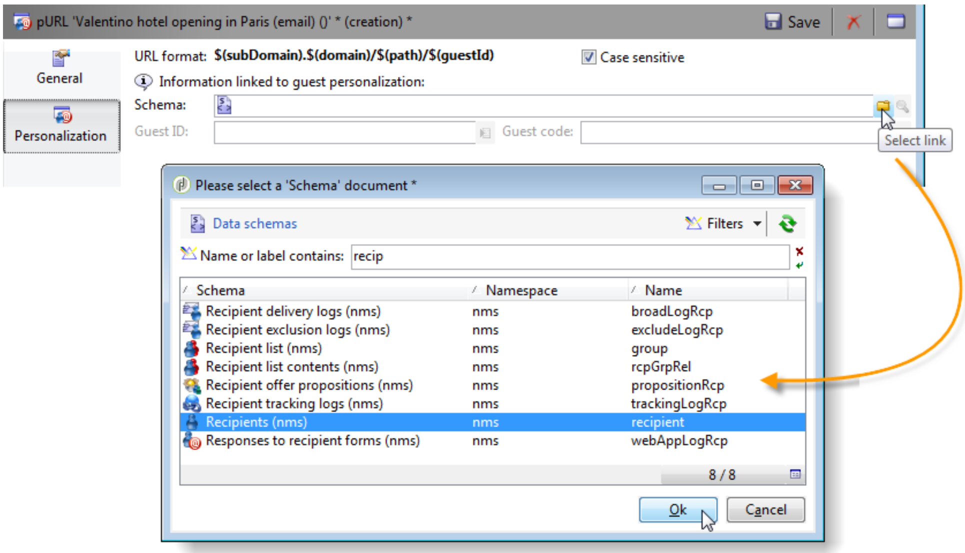
Leave the sub-domain free for the person who links the pURL to the microsite.

---

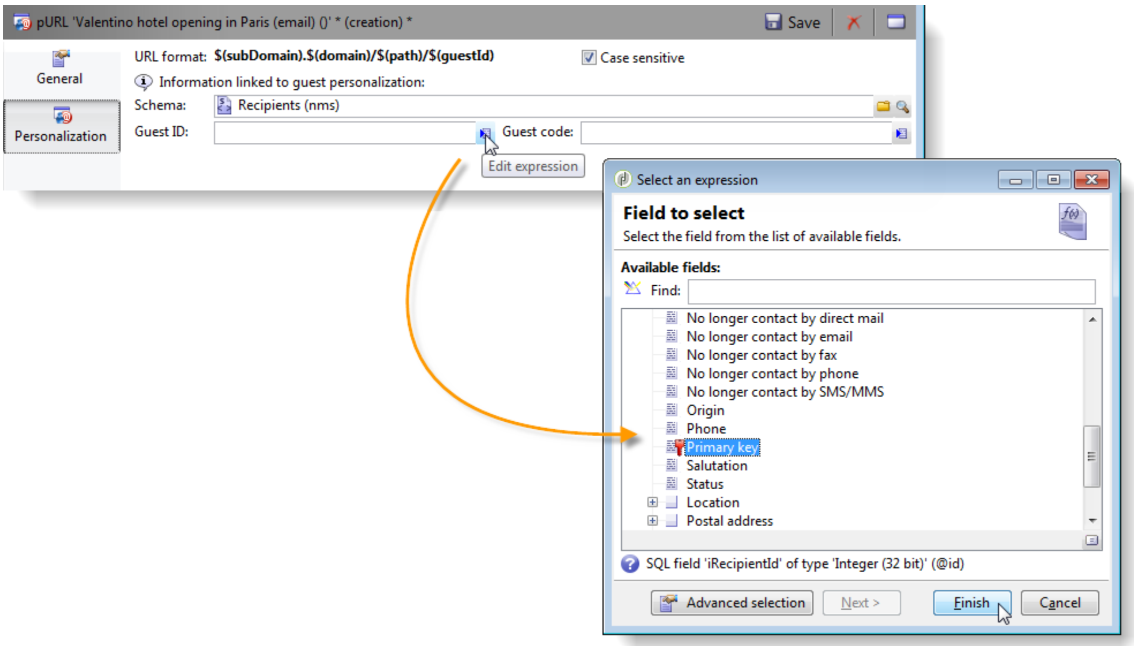
5 Enter the name of the website in the appropriate field: `resa`.



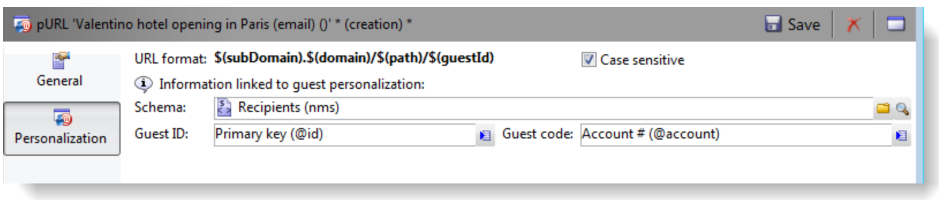
6 Go to the **Personalization** tab and select the **Recipients** schema.



7 Select the **Primary key** as a guest ID.



8 Select the **Account number** field as a guest code.



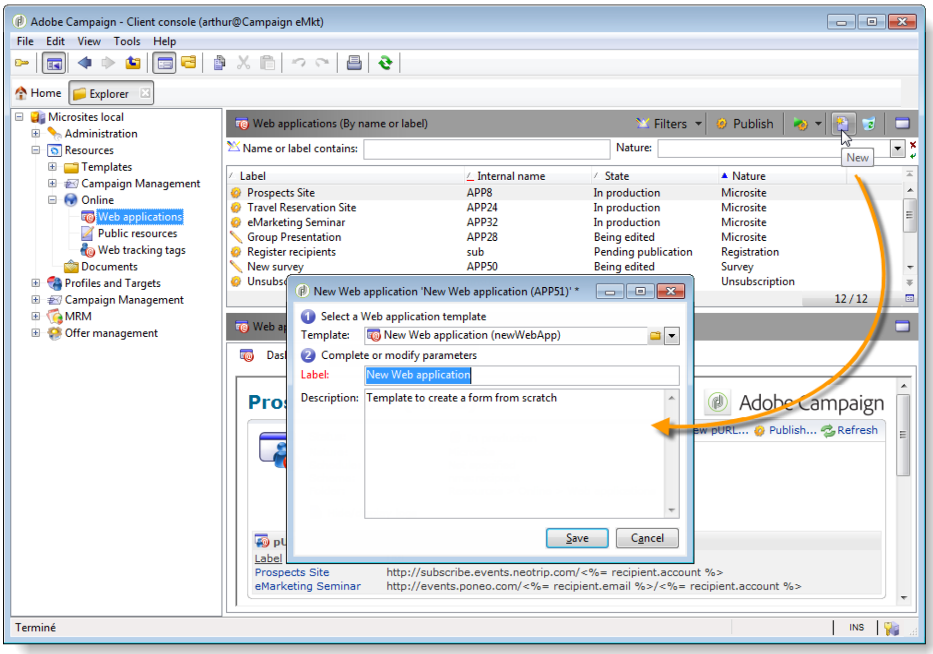
9 Save the pURL template.

Creating a microsite

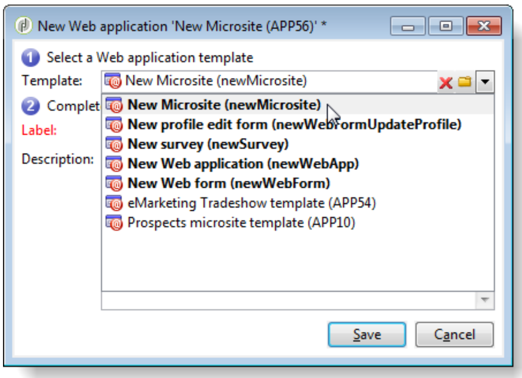
We are about to create a microsite to be used by guests already in the database, who will be asked to identify themselves. The microsite will therefore include an access control activity for safe access, as well as a pre-loading activity to recover guest information.

To create a microsite, apply the following process:

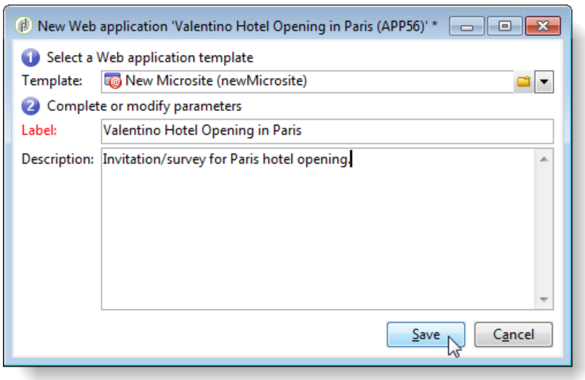
1. Go to the **Resources>Online>Web applications** folder,
2. Click the **New** icon.



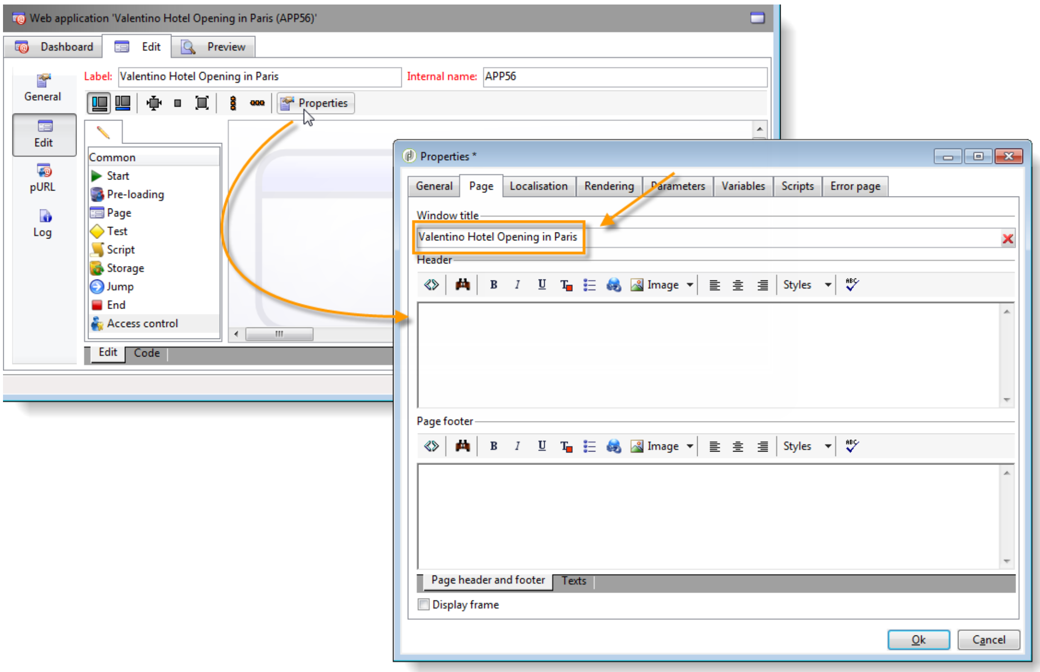
3. Select a microsite model, in this case **New microsite** as a default template.



4 Change the label, in this case: `Valentino Hotel opening in Paris`.



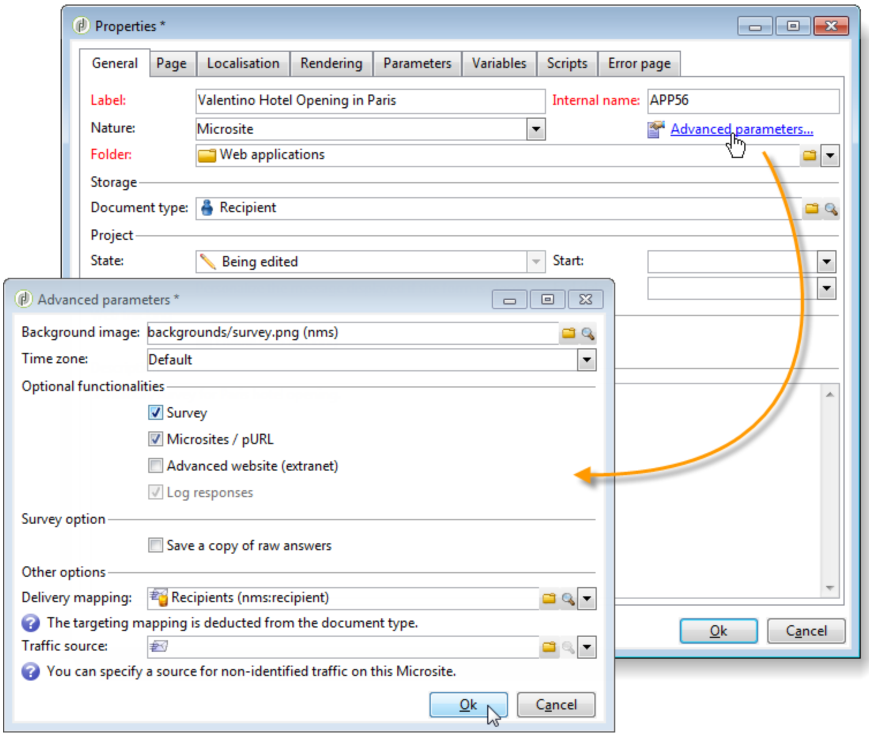
5 Click **Properties** and add a title for your microsite page, in this case: `Valentino hotel opening in Paris`



This title will be displayed in the browser window when the microsite is accessed.

6 Go to the **General** properties tab and click the **Advanced parameters...** link.

7 Add the **Survey** functionality.



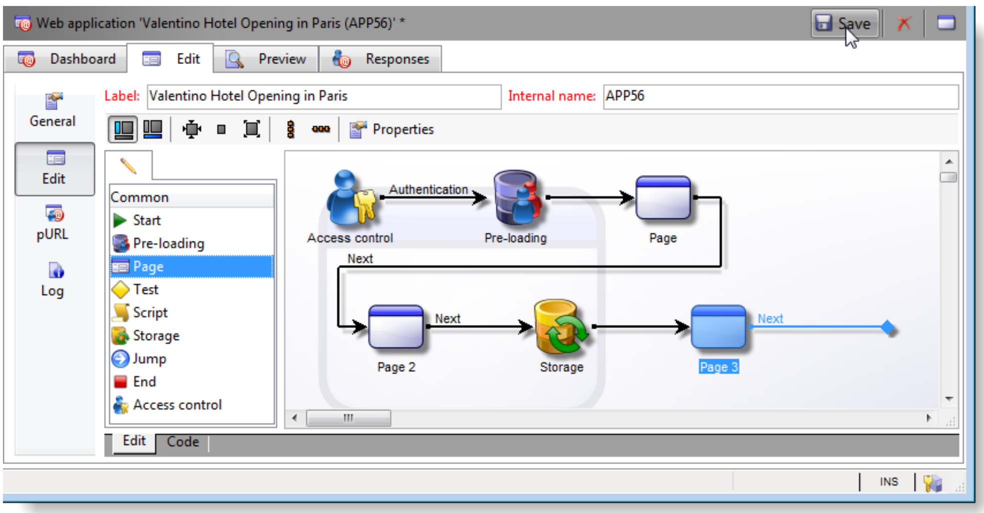
You can now use the online survey functionalities. For more on this, refer to the Overview [page 187] chapter.

8 Save your microsite.

Now we are going to create the content of the microsite. It will include an access control activity to secure access to the pages reserved for identified guests.

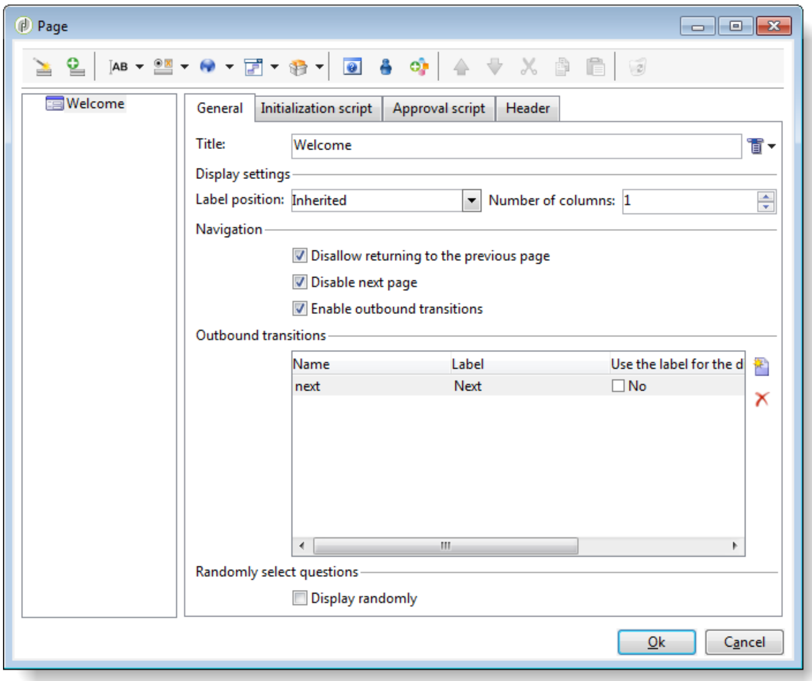
1 Go to the **Edit** tab to place and link up your microsite activities:

- Access control,
- Pre-loading,
- A first home page that includes text and a button to access the survey on the next page,
- A second page for your survey,
- A record activity to save survey answers,
- A third closing page that will include an invitation and a discount.

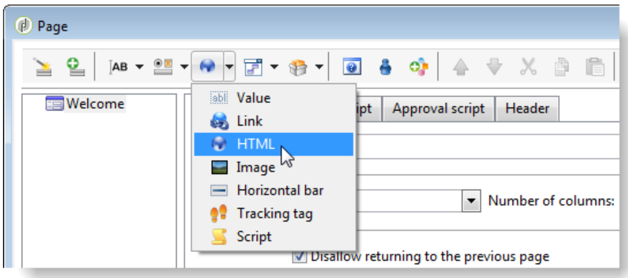


2 Double-click the first page to configure it:

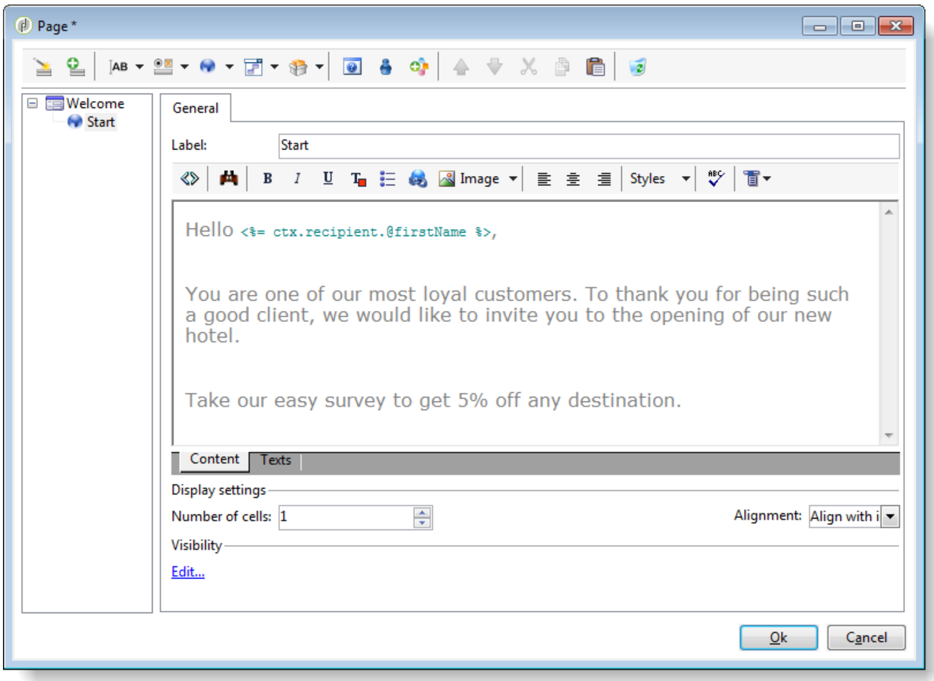
- Assign a title to the page: `Welcome`,
- Select the three browsing options,



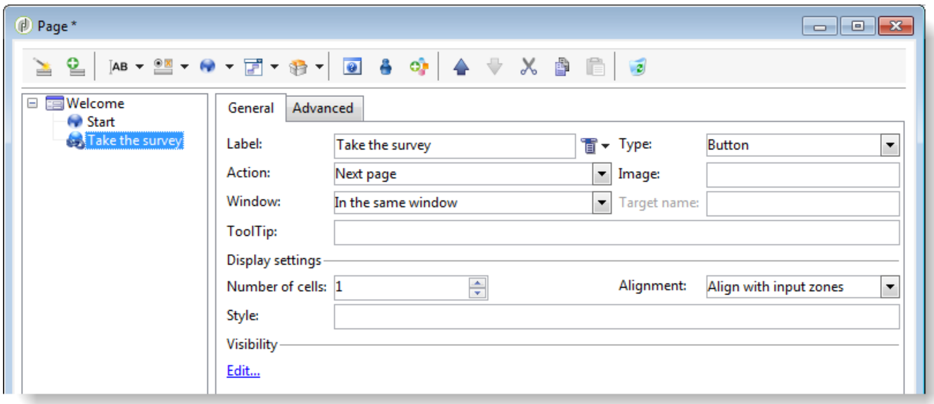
- Go to the toolbar and add HTML content,



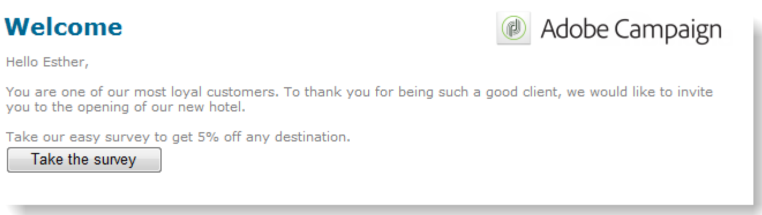
- Change the label (`Start` in this case) and insert the text for the first page of the microsite,



- Add a link and change the label, `Take survey` in this case,
- Select the **Next page** action using the corresponding drop-down list,
- Go to the **Window** field and select **In the same window**,
- Go to the **Type** field and select **Button** using the drop-down list.

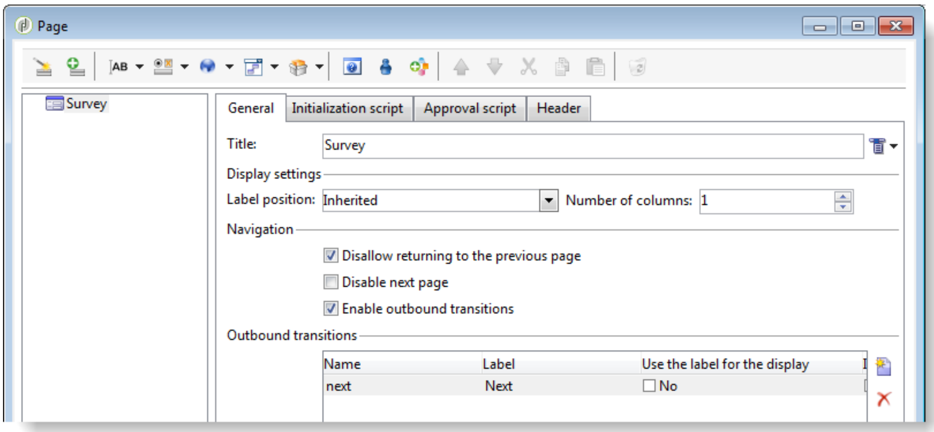


Your first page will look like this:



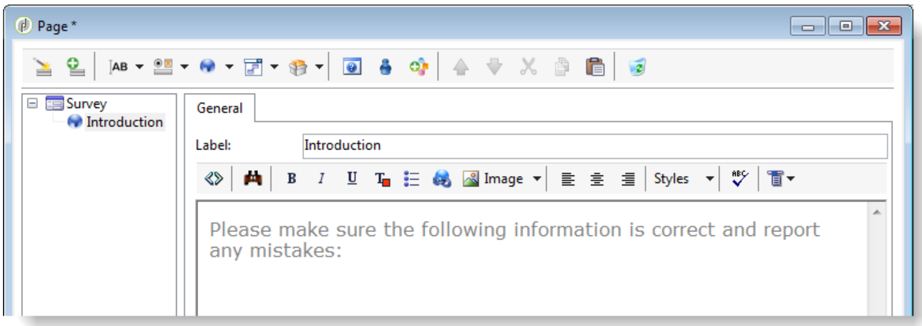
3 Double-click the second page to configure your survey as follows:

- Change the title, in this case : `Survey`,
- Select the **Disallow returning to the previous page** browsing option,



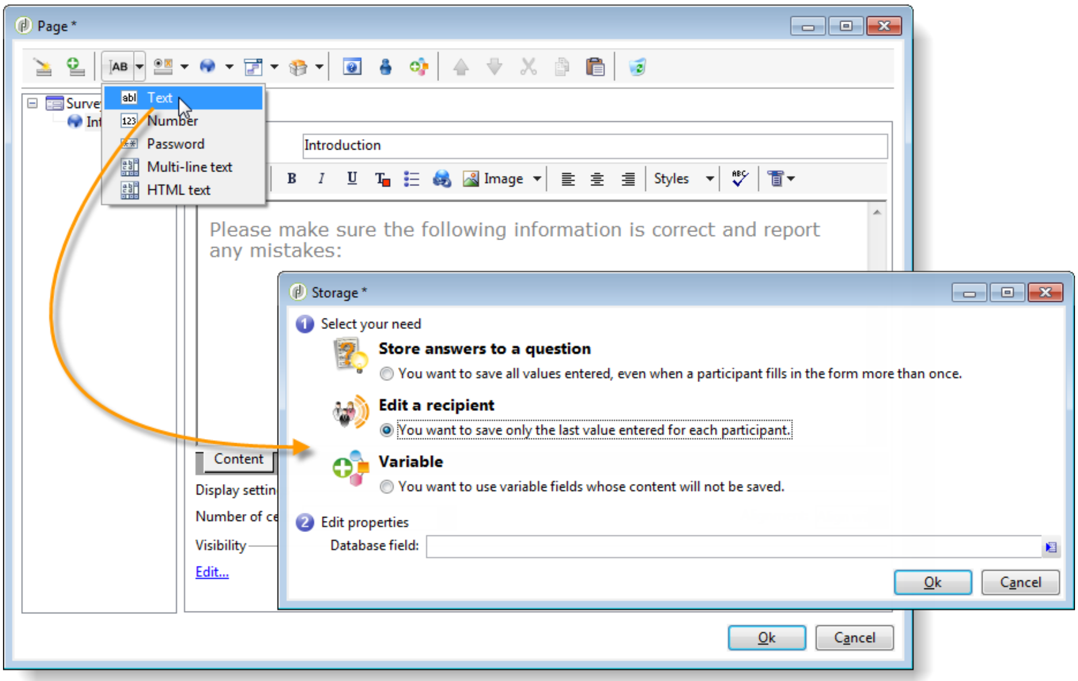
Now we are going to create the section that will let guests check their contact details: last name, first name, email and account number.

- Add HTML content using the toolbar, change the label (`Introduction` in this case) and insert your text for the introduction.
-

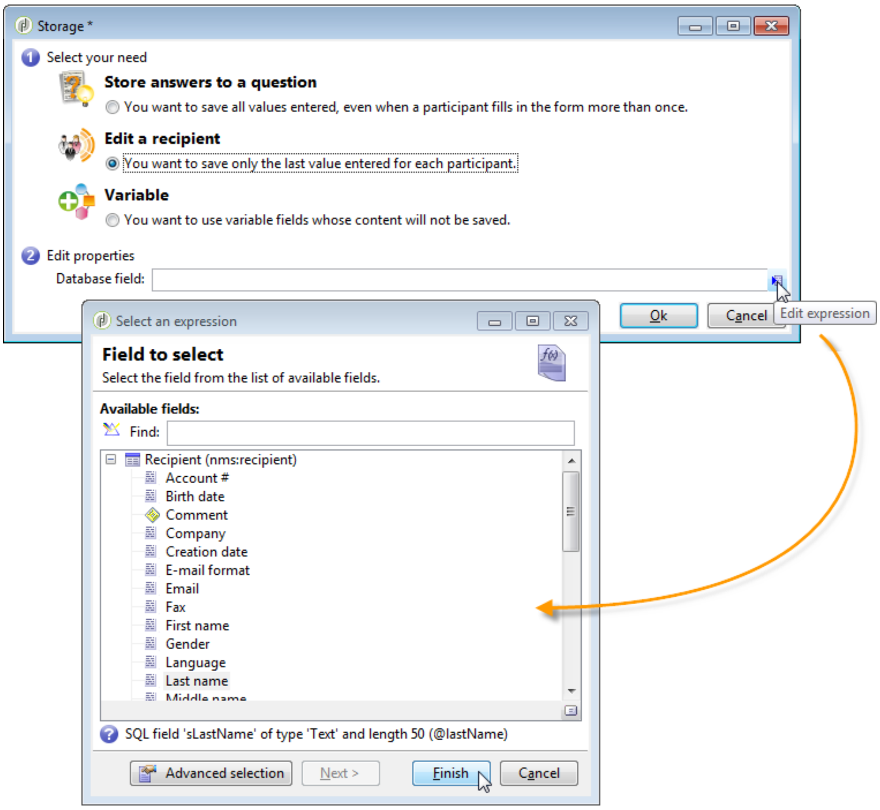


- From the toolbar, add a **Text**-type field.

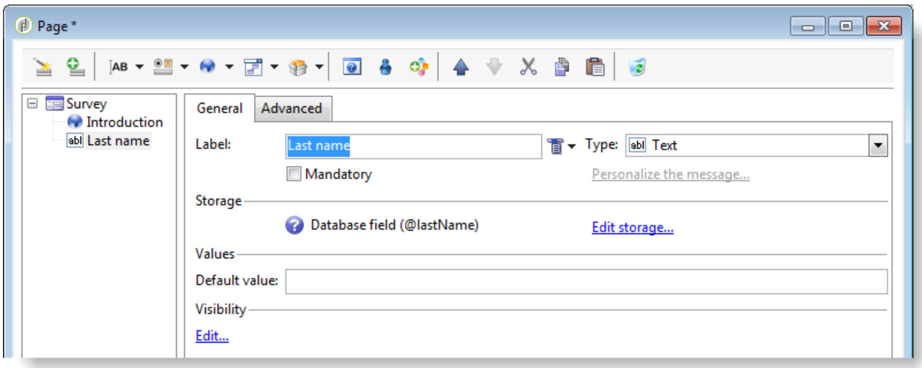
- Choose **Edit a recipient** as a storage option,



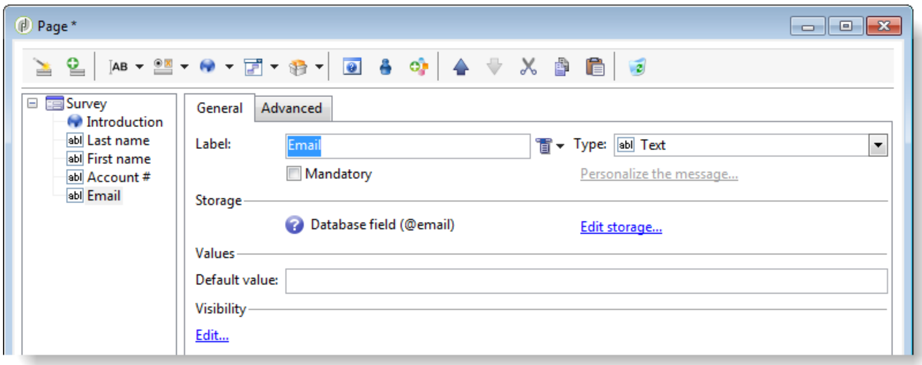
- Select the **Name** field,



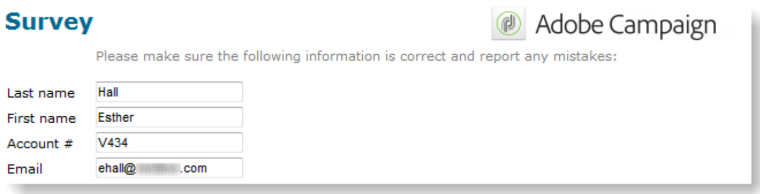
- Change the label of the `Last name` field,



- Repeat the process to add the **First name**, **Email** and **Account number** fields.

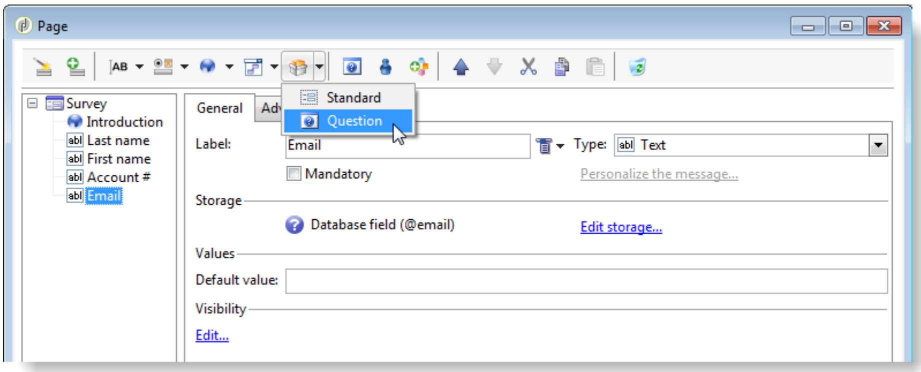


This section of the survey will look like this:

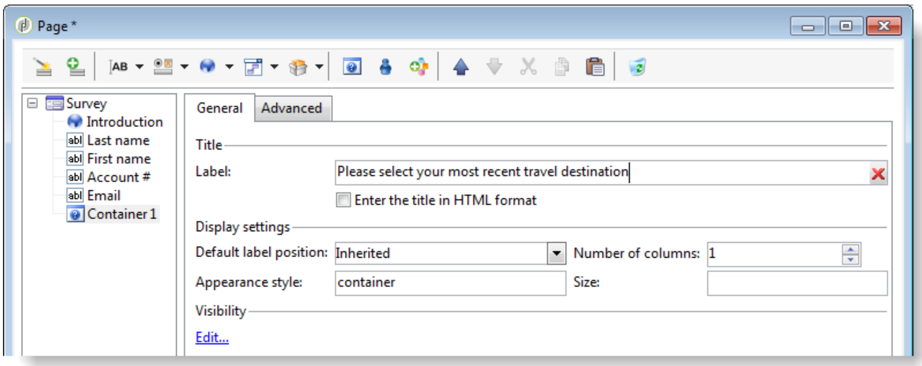


Now we are going to create our first series of questions.

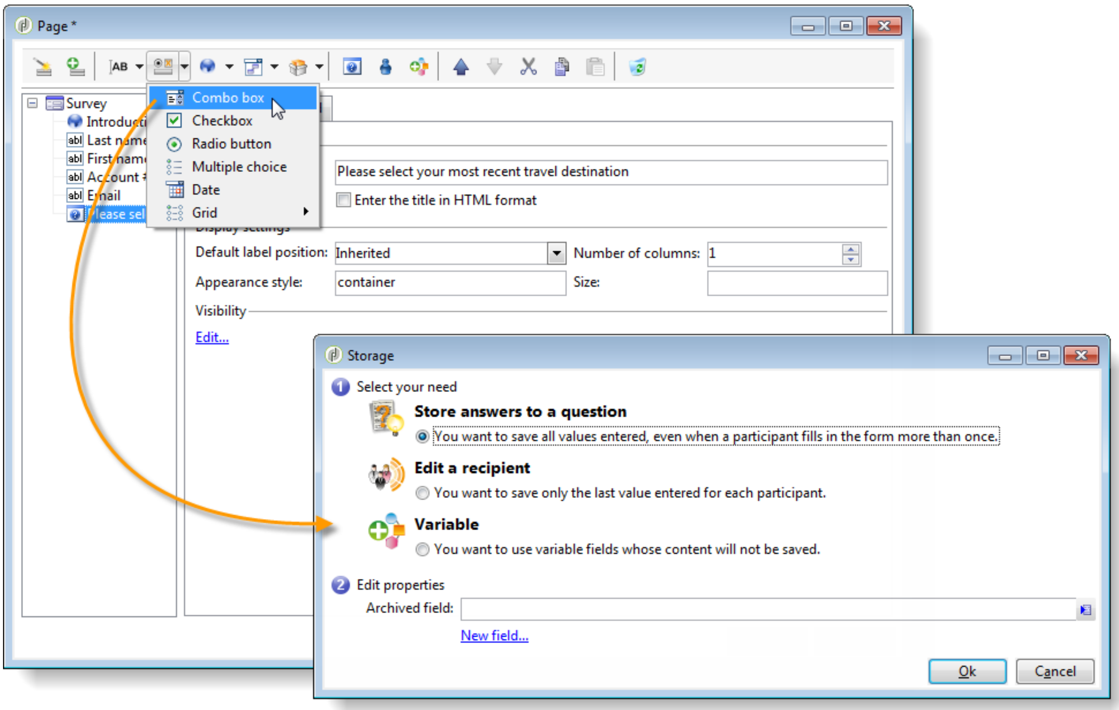
- Add a **Question**_type container,



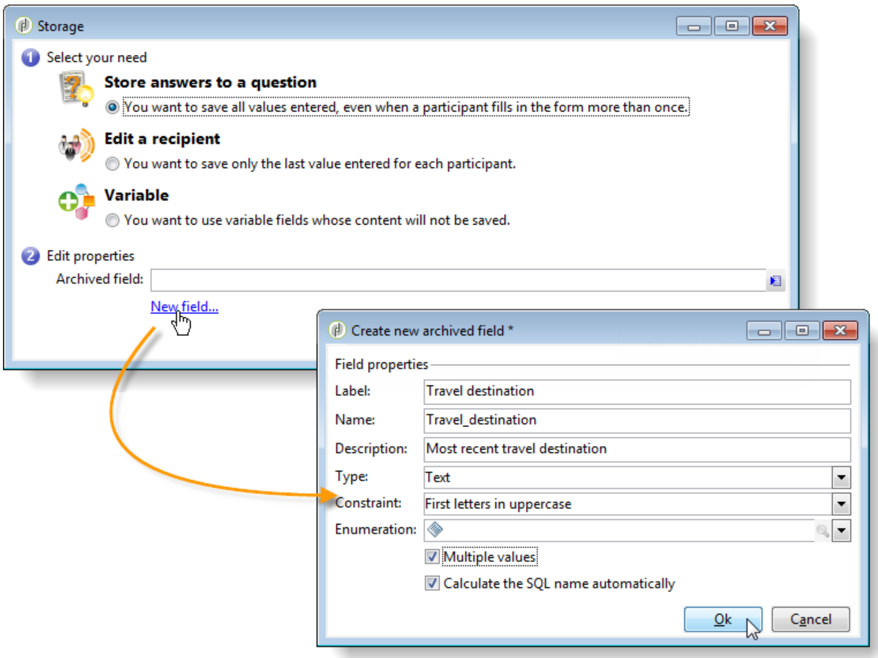
- Change the label for the question, in this case: `Please select your most recent travel destination`,



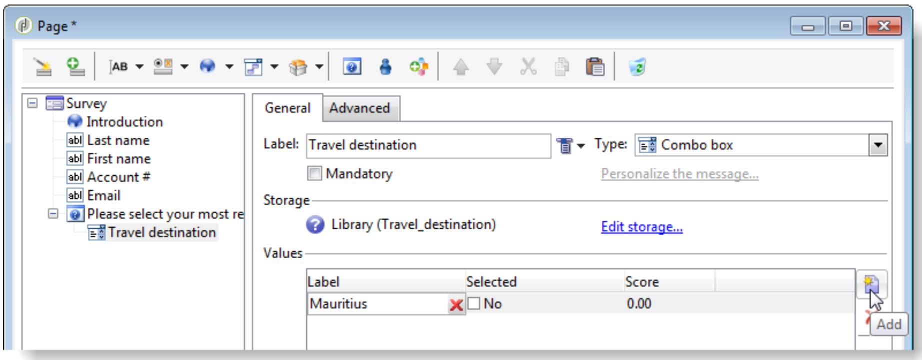
- Insert a drop-down list and select the **Store answers to a question** option,



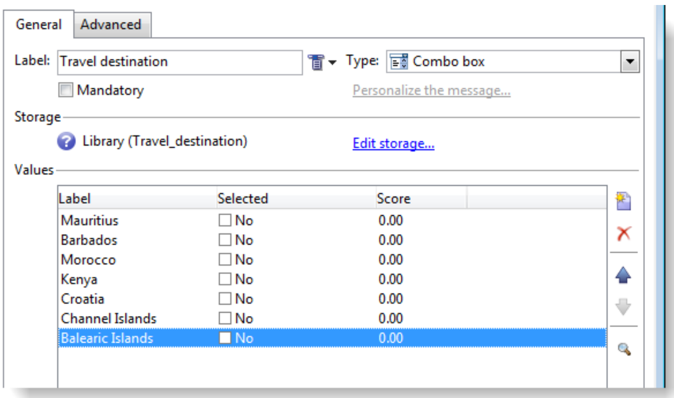
- Click **New field** and fill in the properties of the field.



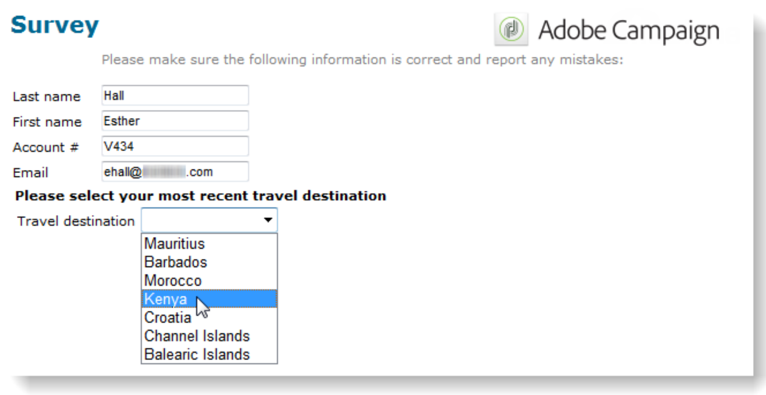
- Click **Add** and create the values of the drop-down list,



- Repeat this process to create the full list of destinations.

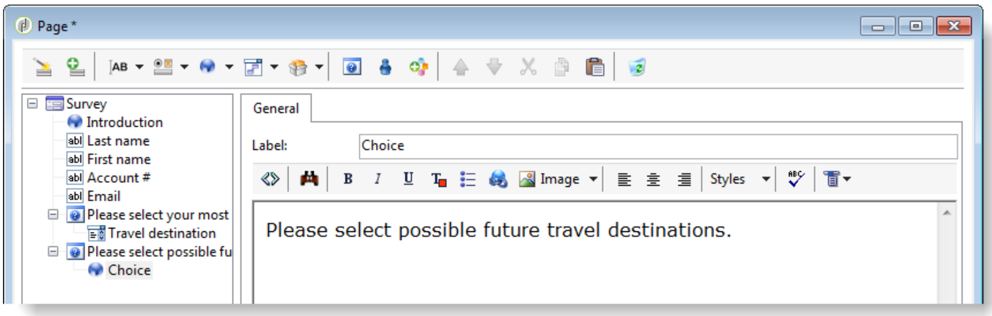


This section of the survey will look like this:

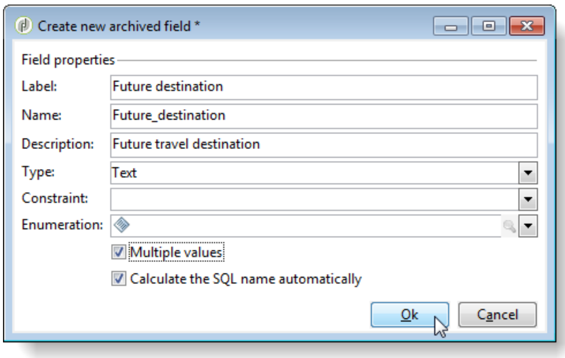


Now we are going to configure our second series of questions.

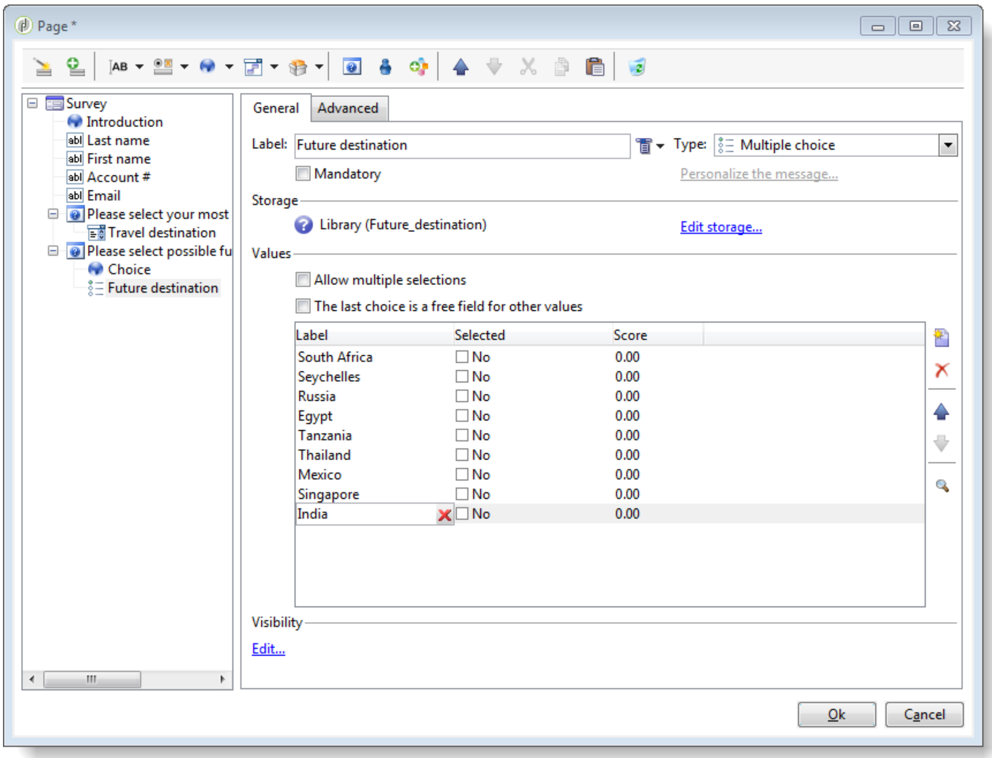
- Add a second **Question** type container.
- Change the label for the question, in this case: `Please select possible future travel destinations`,
- Add HTML content, change the label (`Choice` in this case) and insert the instructions for answering questions,



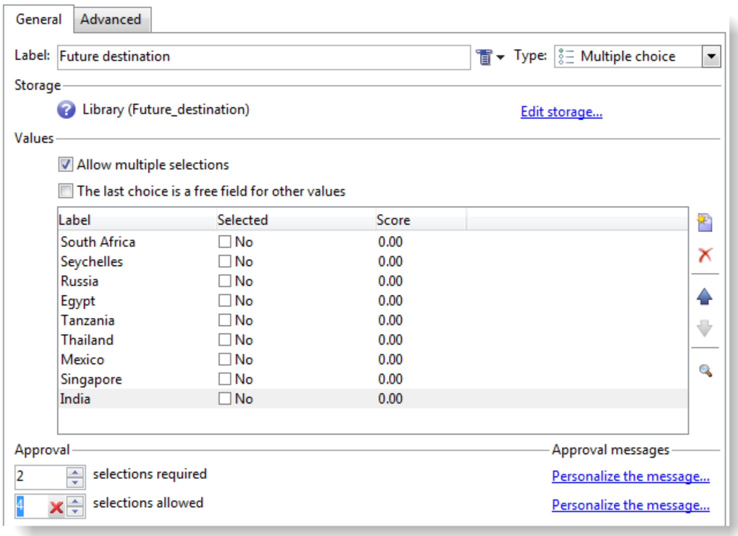
- Using the **Selection controls** icon, insert a multiple choice list and select the **Store answers to a question** option,
- Then click **New field** and enter its properties. Select the **Multiple values** option to store several answers,



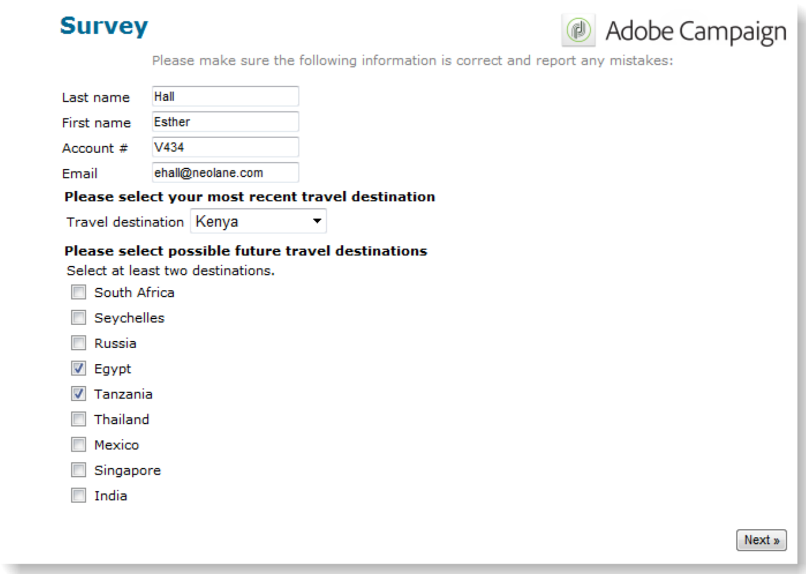
- Click **Add** and create the values for the multiple choice list,



- Select **Allow multiple selections** and configure approval for a minimum of two choices and a maximum of four.

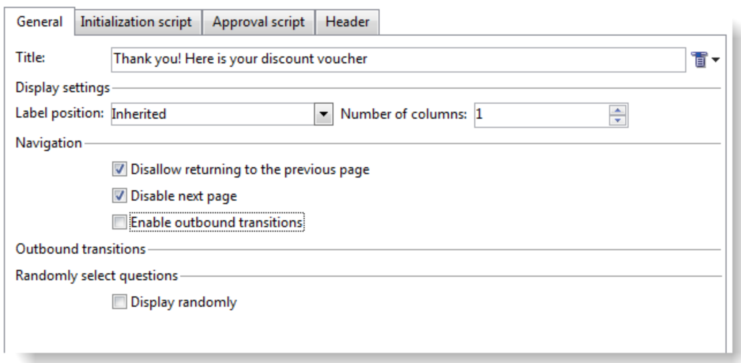


This section of the questionnaire will look like this:



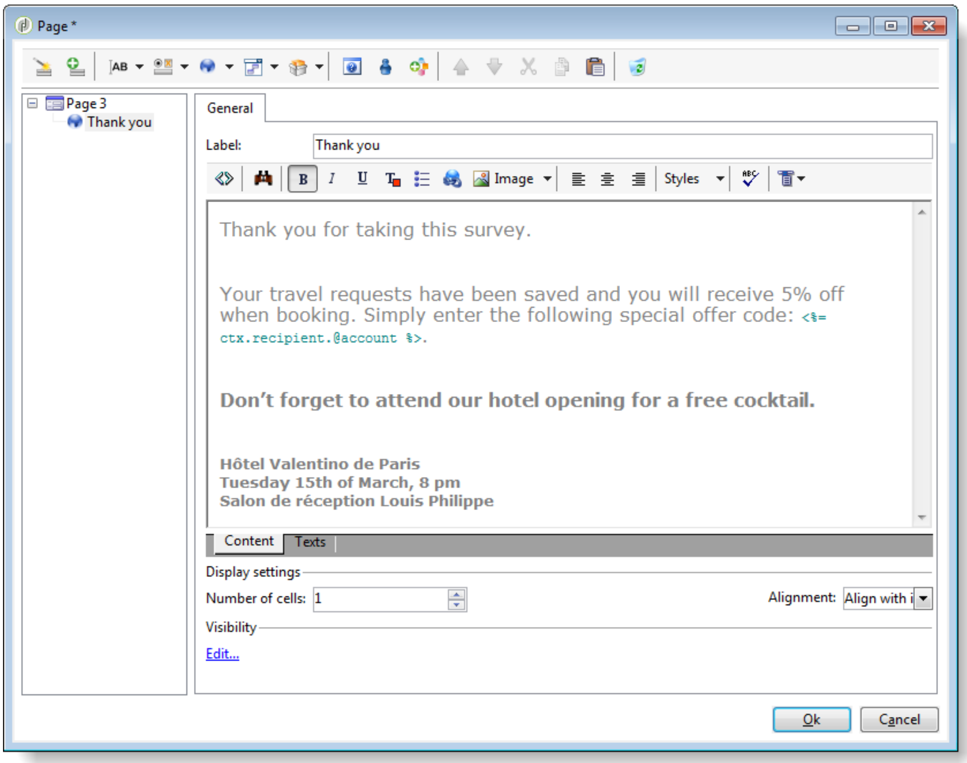
4 To configure the last page, apply the following process:

- Assign a title to the page: `Thank you! Here is your discount voucher`,
- Select the first two browsing options,

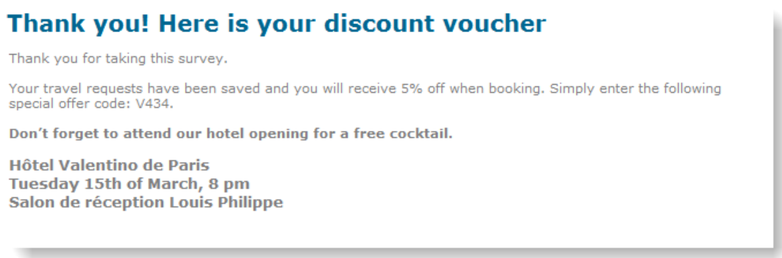


- Go to the toolbar and insert HTML content,

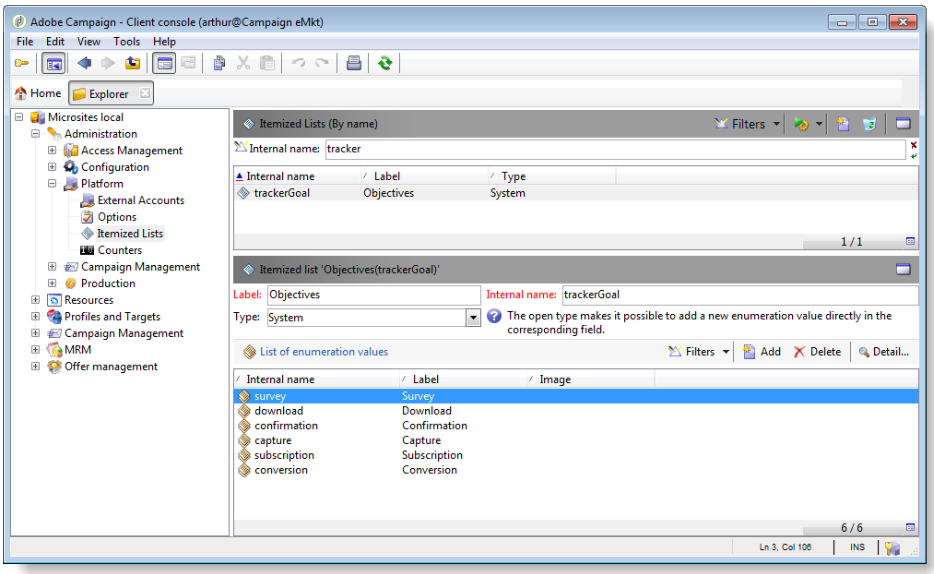
- Change the label (`Thank you` in this case) and insert the text you want to use for the last page of the microsite.



The last page of your microsite will look like this:

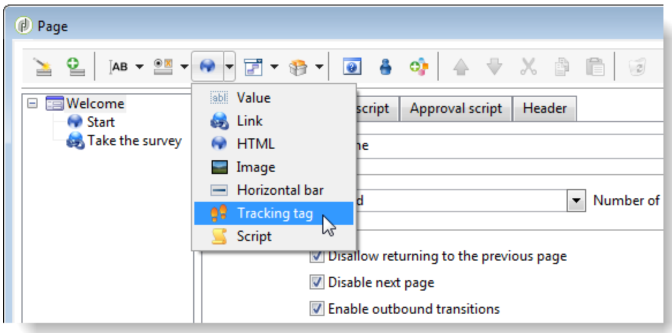


We are now going to insert tracking tags to the microsite to track guests' activities and their access to the various pages. The goal is make sure the people who log on to the microsite take the survey. We're going to use the same goal for each stage of the microsite. Create your goal beforehand in the enumerations list (`Survey` in this case).

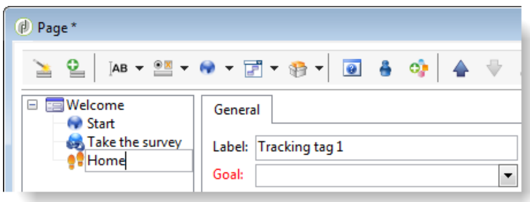


5 To insert tracking tags into the microsite, apply the following process:

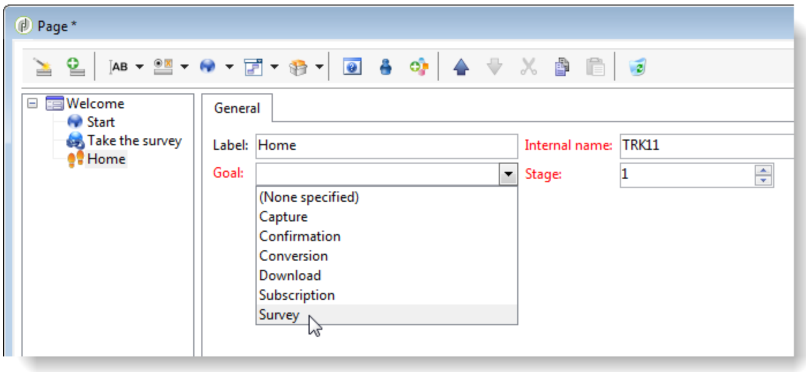
- Open the first page of the microsite and select **Static elements** > **Tracking tag**



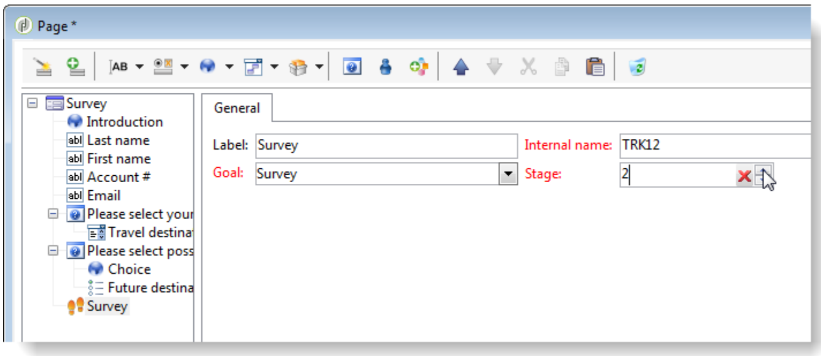
- Change the label to: `Home`,



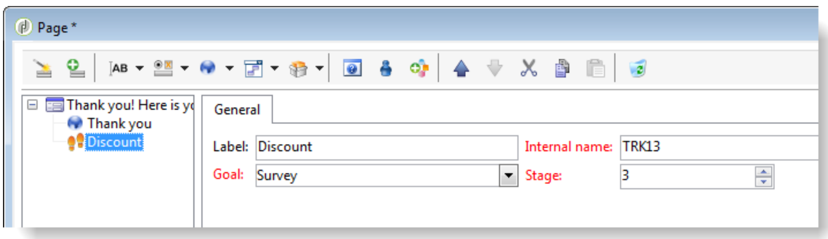
- Select the `Survey` goal and keep the stage number to *1*.



- On the second page, create a tracking tag with a `Survey` label and assign *2* to the **Stage** field.



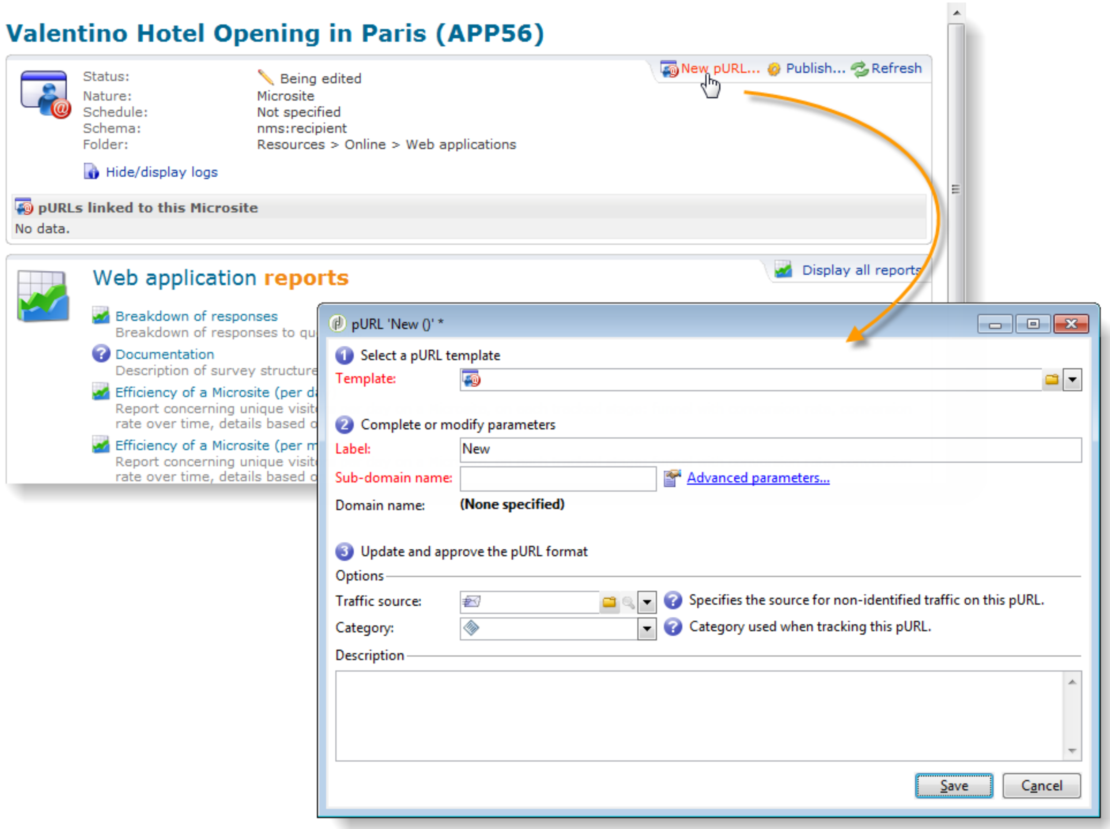
- On the third page, create a tracking tag with a `Discount` label and assign *3* to the **Stage** field.



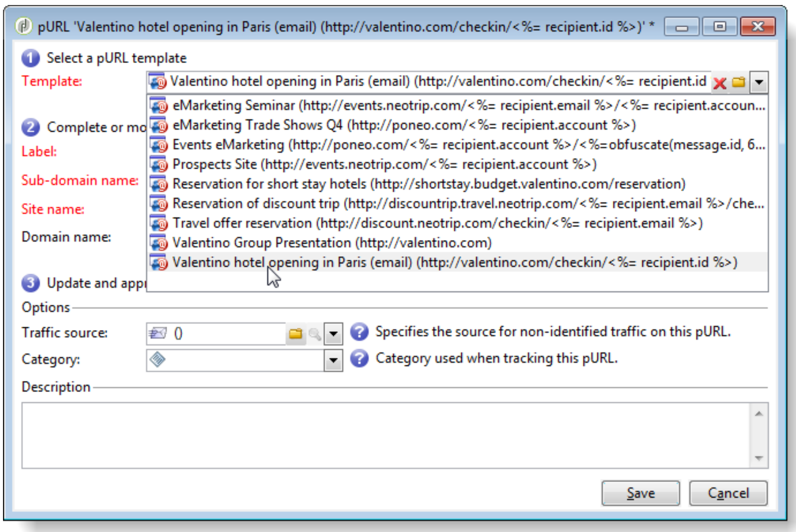
Now we want to link the personalized pURL created previously to the microsite. This is when you choose a sub-domain. Assign the name of the sub-domain you want to use depending on the look you want for your URL. Do make sure your DNS is configured accordingly.

6 To insert the pURL into your microsite, apply the following process:

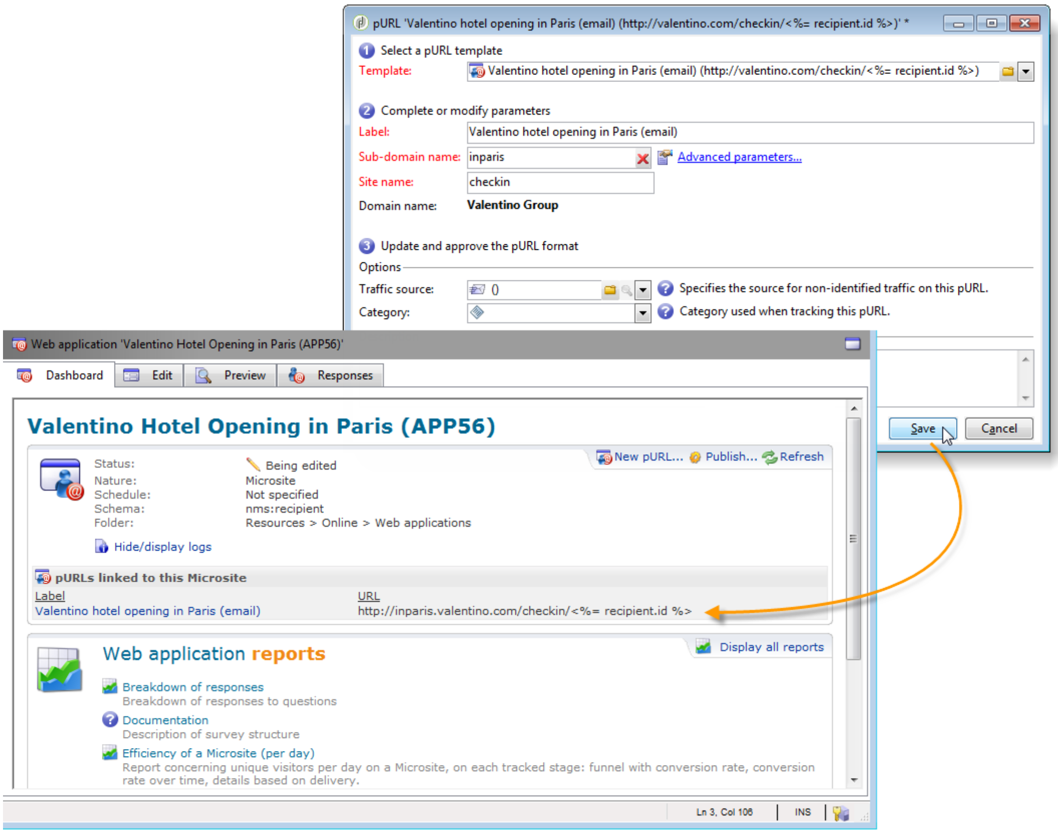
- Go to the microsite dashboard and click **New pURL**.



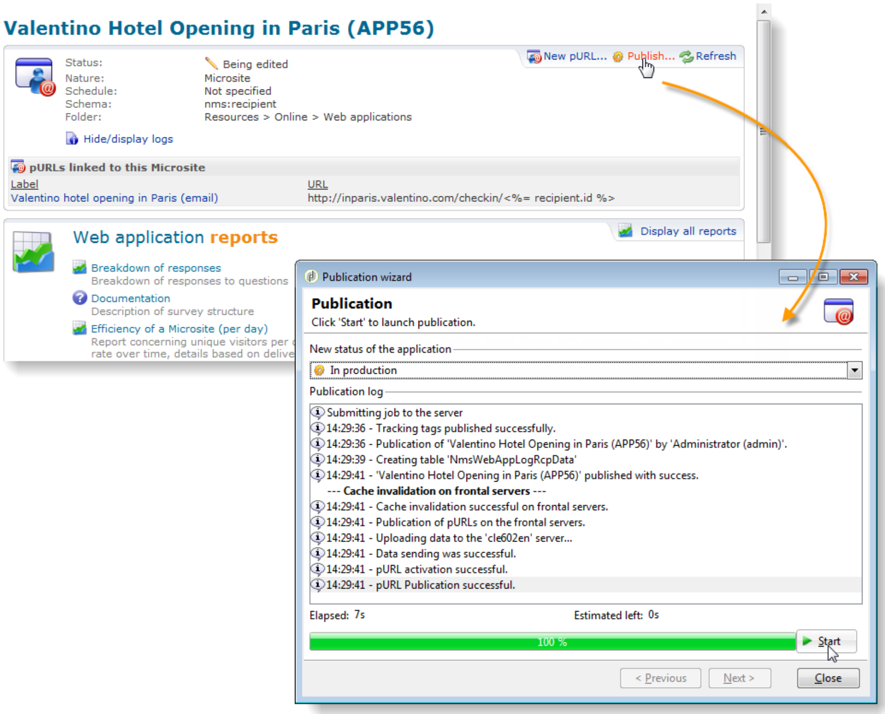
- Select the pURL template which you configured for email deliveries,



- Specify the sub-domain name (`paris` in this case), then click the **Save** button,



7 Go to the microsite dashboard and click **Publish** to make the microsite accessible to guests.

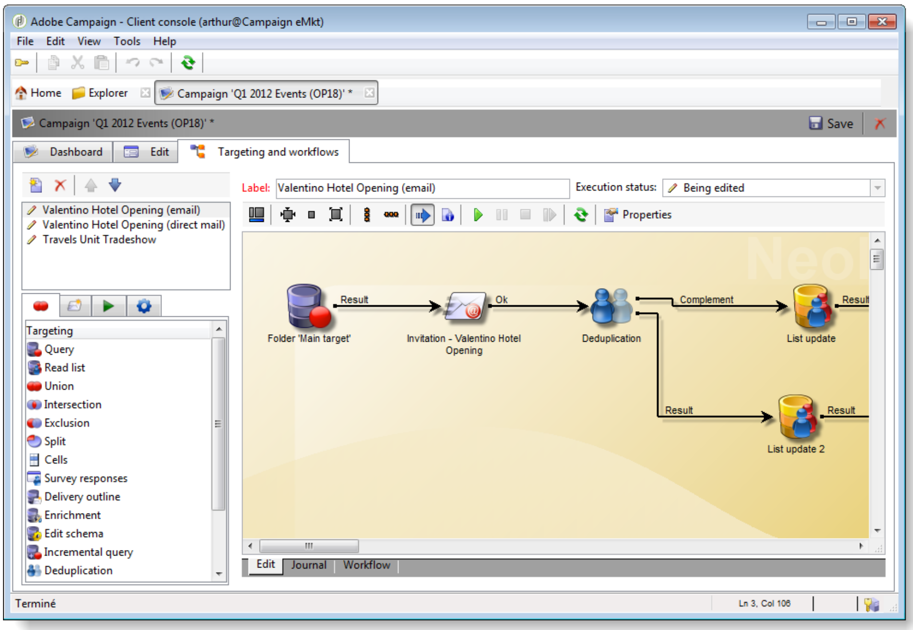


Notifying guests

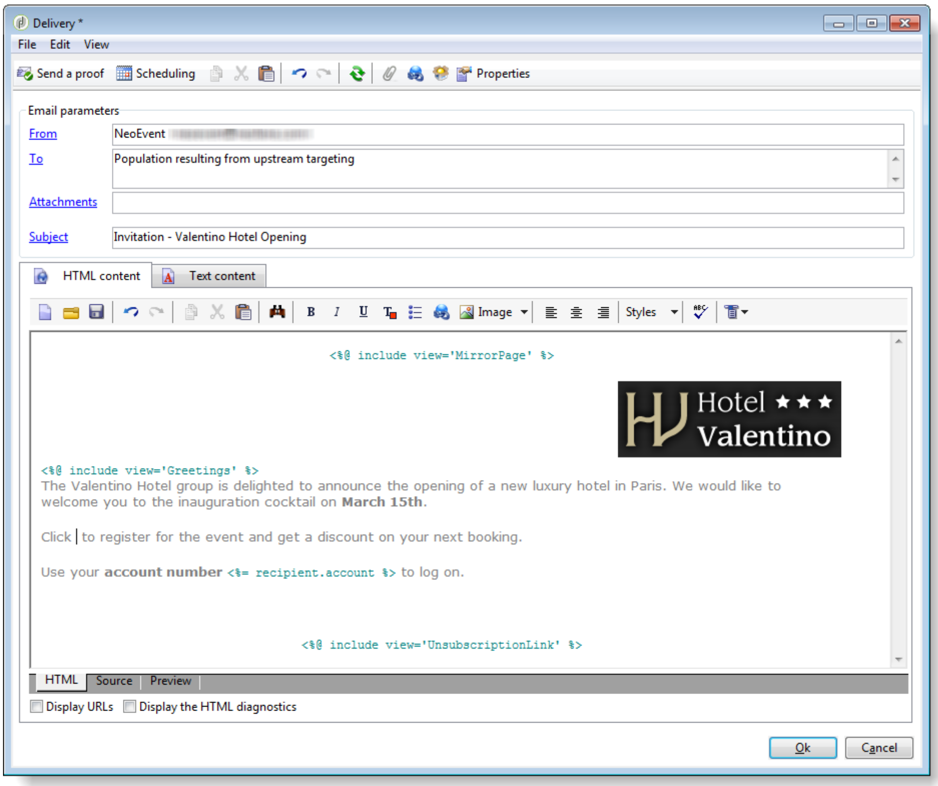
Your microsite is now accessible. You now need to notify your guests so that they can log on to their personalized website. Notifications are sent via a standard marketing campaign (refer to the Campaign guide).

To create a delivery, apply the following process:

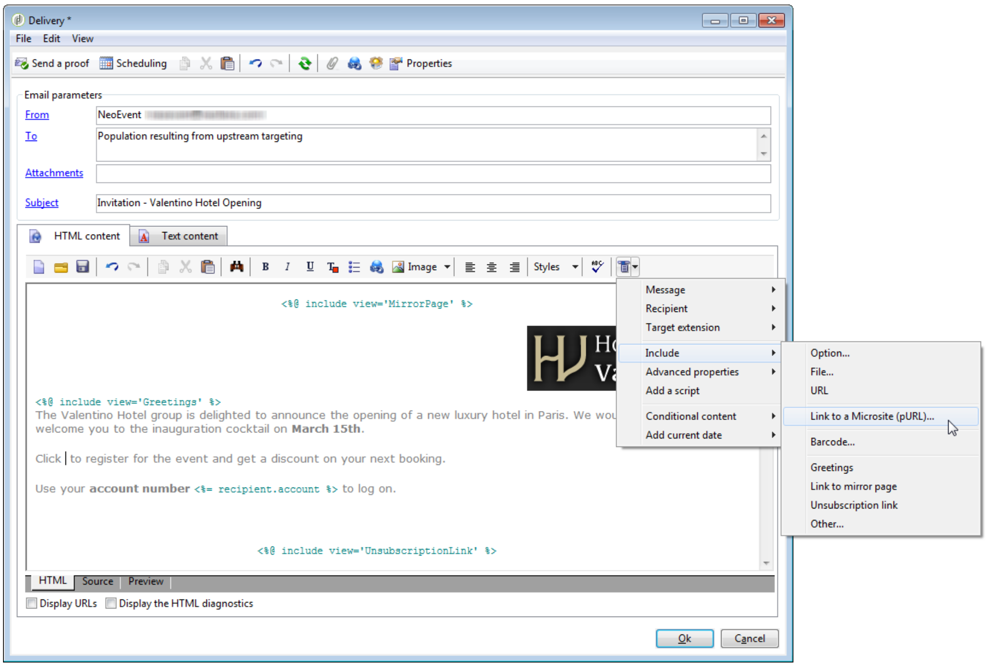
1 Create the marketing campaign and the targeting workflow,



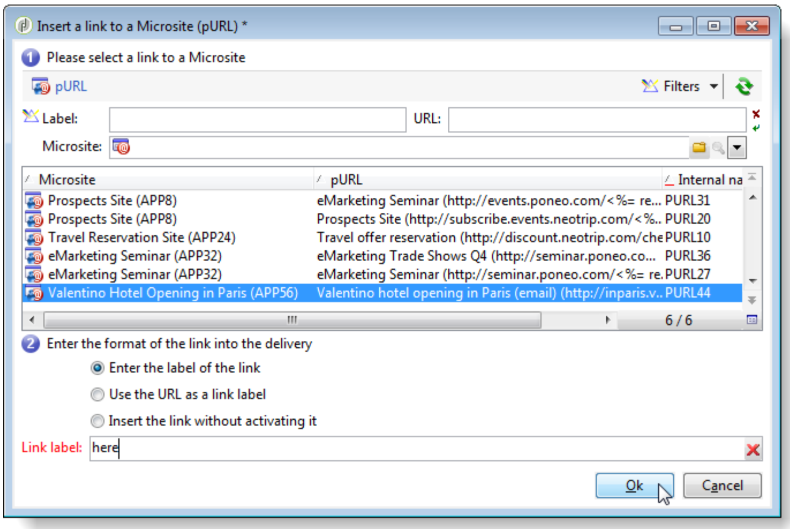
2 Edit the email delivery and enter the message content,



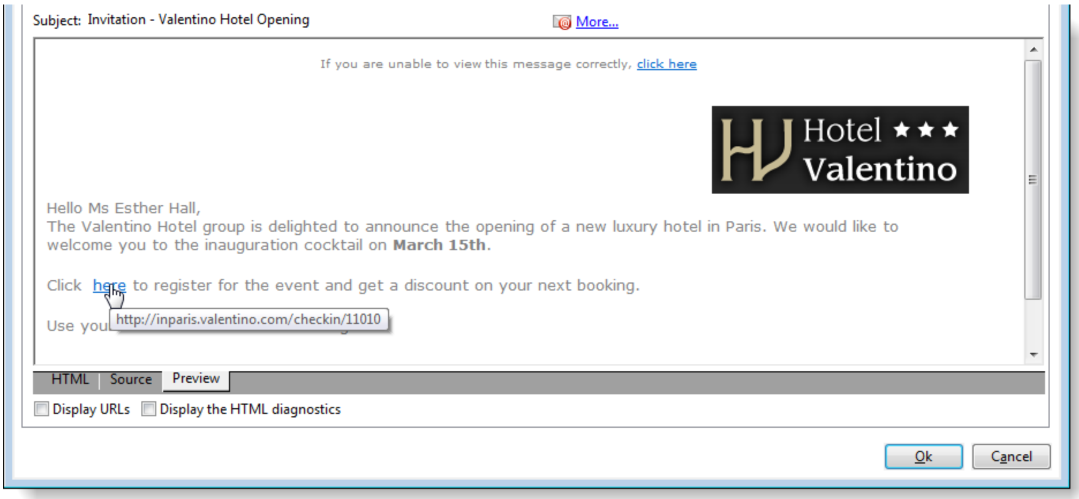
3 Place the cursor where you want to insert the microsite URL and select **Include** > **Link to a Microsite (pURL)**,



4 Select the *`Valentino Hotel Opening`* pURL and assign the label *`here`*,



Your delivery will look like this:



5 Save the delivery and start the targeting workflow.

Once the delivery is sent and the recipients log on to the website, their activity is recorded in the microsite reports. The tracking tags inserted into each page will enable you to measure the number of views.

Usage rules

We recommend that you comply with the rules detailed below:

1 Securing access to the microsite

This step is essential when personal or even confidential information is likely to be exposed on the microsite. To secure access, use the **Access Control** box and define the guestCode in the pURL.

The guest access code can be requested either when accessing the microsite itself or when accessing the secure section of the site. You may also include the password in the pURL.

2 Guaranteeing the deliverability of messages which contain pURLs

To avoid creating content is likely to be identified as fraudulent (phishing), please comply with pURL creation rules. For instance, we highly recommend that you disable tracking on pURLs whose links are used as labels.

3 Guaranteeing guest identification

The GuestID in the pURL must be unique to guarantee that Mister A will not be asked to log on to Mister B's site. To do this, use a field of the database with a unique index, such as the primary key of the guest. Whatever choice of field you make must be final.

4 Checking the displayed information

We recommend that you differentiate the information displayed in the secure zone from the information shown in the non-secure zone. To do this, define personalization levels based on zones (before and after identification) and create a typology of the personalization fields (for instance: standard, sensitive, confidential).

5 Using pURL codes

Code pURLs contain the identifier of the delivery and that of the recipient, and are unique for each pURL: they enable you to guarantee that the link is unique. To do this, you need to include a pURL code in the pURL format. pURL codes are reserved for small delivery volumes and mainly concern paper deliveries. Implementation is complex and their nature makes them hard to read.

6 Optimizing loads and performances

To avoid repercussions in terms of performance and volumetry, tracking tags must be placed in the relevant sections of the microsites. Please use tracking tags sparingly and on appropriate pages, after identification for instance.