

DATASET ACTIVATION

Dataset Activation allows you to quickly set up new datasets inside ChannelMix Control Center.

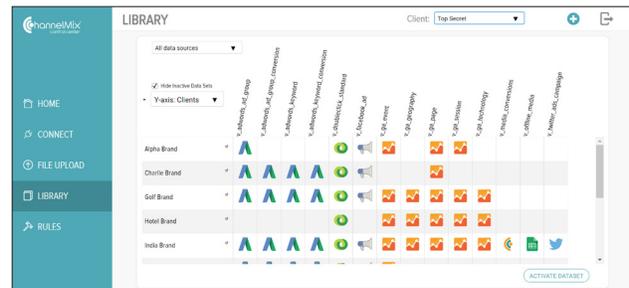
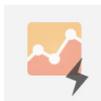
For most datasets, your request will kick off the activation process immediately. You should have access to the new dataset in moments. For other datasets, your request will automatically submit a Zendesk ticket to the Data Solutions team to activate your dataset.

How to Use Dataset Activation Via the Library Page

From the Library page, there are two primary methods for activating a dataset.

Method 1

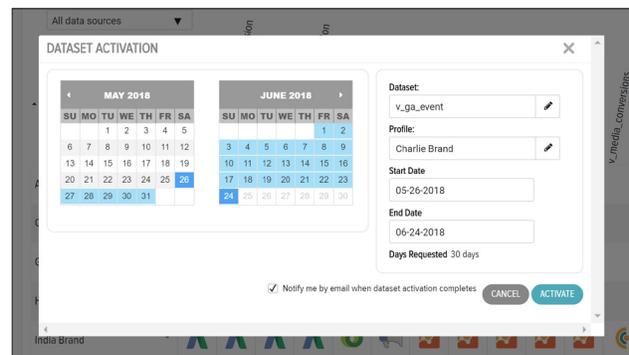
As you move your cursor over an empty dataset cell, you'll see a transparent icon appear. If the icon includes a lightning bolt, you can activate that dataset completely on your own.



When you click the icon, a Dataset Activation pop-up will appear. The dataset field should already be populated, but you'll be prompted to assign a profile to that dataset.

You'll need to select a date range for this dataset, by using the calendar picker or by entering the exact dates.

The pop-up will give you the option to receive an email notifying you when the dataset has been activated. That box comes pre-selected, as we recommend that you elect to receive the email.



Once you've selected your desired dates, hit the teal Activate button in the bottom right corner of the pop-up. Another pop-up window will confirm the refresh process has begun. Click OK.

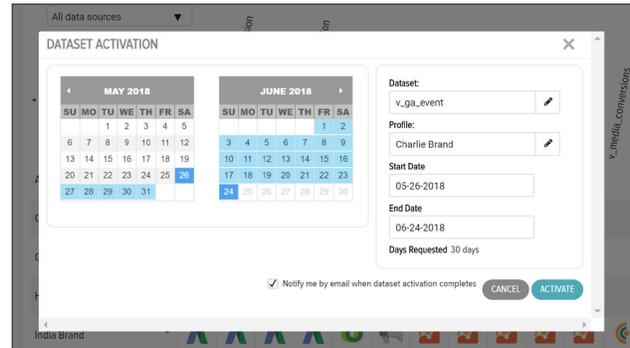
If a transparent dataset icon includes a tiny "ticket," additional help will be needed to activate that dataset. You can create the Zendesk ticket right from the Library page to get the process started.



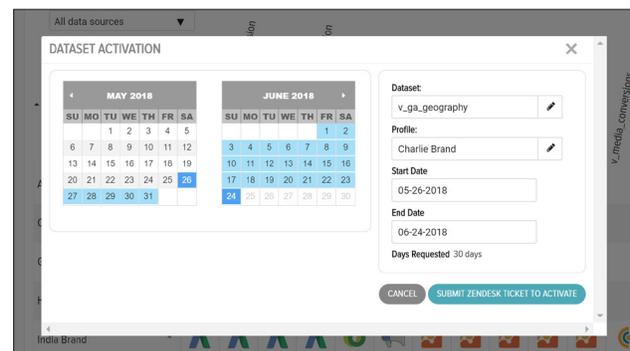
Click the icon, and a Dataset Activation popup will appear. You'll need to assign a profile to the dataset and select a date range.

Once you've selected your desired dates, hit the teal Submit Zendesk Ticket to Activate button in the bottom right corner of the pop-up. Another pop-up window will confirm your ticket has been submitted. Click OK.

Your ticket will be placed in the queue to be processed by the Data Solutions team.



NOTE: If your new dataset includes more than 30 days of data, the most recent 30 days will be backfilled first — within moments. All other dates will be added to the queue and processed later.



What if you need to activate a dataset for a data source that hasn't been connected yet?

Click the icon for the dataset you want to create, and the Dataset Activation pop-up will appear. Assign a profile to the dataset, and select a date range.

Instead of the Activate button, you'll see a teal Configure and Submit button. The Additional Configuration Required pop-up will now appear.

If the desired data source has already been connected to your account, you will be able to select it under the Connection dropdown.

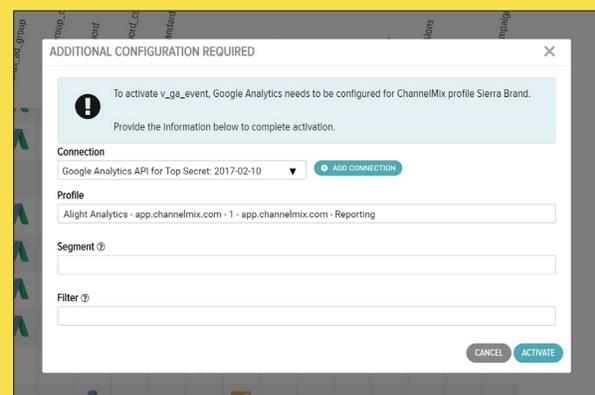
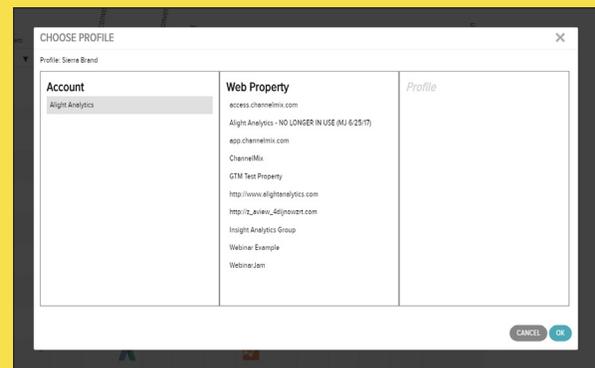
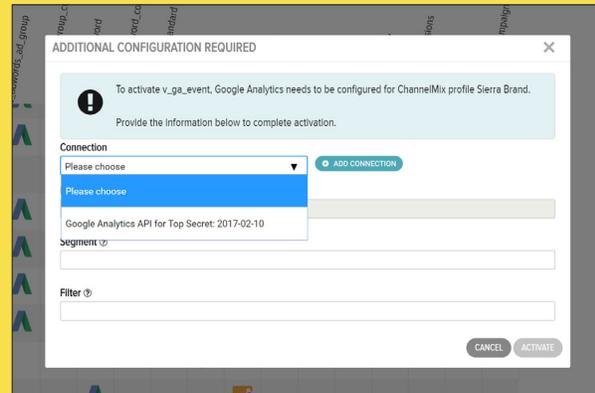
If your desired data source hasn't been connected, click the Add Connection button.



Back in the Additional Configuration Required pop-up, click into the Profile field. You'll then see a Choose Profile pop-up. Select the correct profile, and click the OK button.

You'll be taken back to the Additional Configuration Required pop-up. You have the power to include Segment and Filter information, but those are not required.

Click the teal Activate button. You should see a pop-up telling you that your dataset is being created for the date range you selected. Click OK.



Method 2

You can also request activation by clicking the Activate Dataset button in the bottom right corner of the Library page.



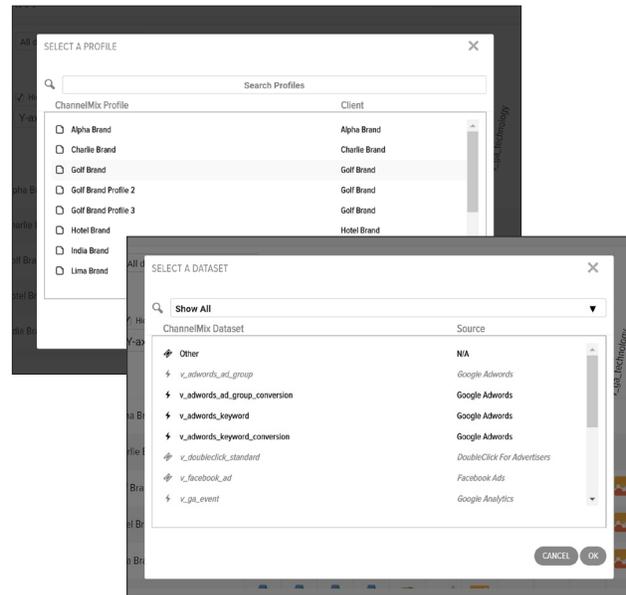
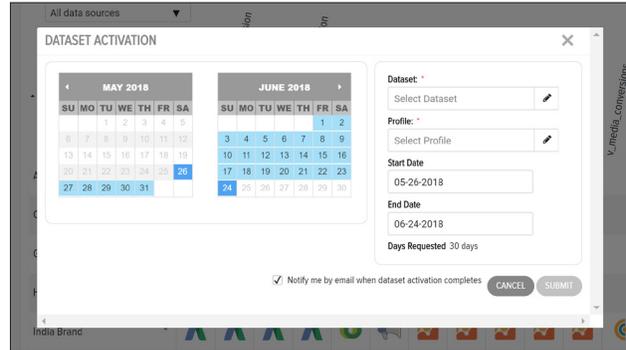
The Dataset Activation pop-up will appear again. First, click the Profile field, and use the Select a Profile pop-up to choose your desired profile.

You'll be taken back to the Dataset Activation pop-up. Click the Dataset field.

This will bring up the Select a Dataset pop-up. You will see a list of potential datasets.

- Italicized text indicates datasets that have already been activated.
- The lightning and ticket icons show whether you can activate a dataset independently or need to request activation.

Select the desired dataset, and click OK.



What if you need to create an entirely new dataset, one that doesn't appear in the list on the Activate a Dataset pop-up? Select Other and click OK.



You'll now see a different version of the Dataset Activation pop-up — one that has a section labeled Requested Dataset - Other.

By completing this section of the form, you can create a request for the Data Solutions team to create your new dataset.

Next to "Please select the connections to use for this data source," click the dropdown. You have the ability to select one or multiple data sources.

In the Data Source field, you can list the name of the Data Source you'll be using. You have the option of pulling data from a Google Sheet. Just paste the URL for that Sheet into this field.

In the next field, list the fields that you want to include in the new dataset.

In the final field, you can list any rules or logic you want to apply to the dataset.

Then click the Submit Zendesk Ticket to Activate button. This will notify the Data Solutions team that their help is needed.

DATASET ACTIVATION

Calendar view for MAY 2018 and JUNE 2018.

Dataset: Other

Profile: Alpha Brand

Start Date: 05-26-2018

End Date: 06-24-2018

Days Requested: 30 days

REQUESTED DATASET - OTHER

Please select the connections to use for this data source (if the connection you need isn't listed please configure it for this profile via the Connect page): NONE SELECTED

Data Source (please list additional sources):

Please enter the names of the fields you'd like included in this dataset:

Please describe any rules or logic to apply to this dataset:

CANCEL SUBMIT ZENDESK TICKET TO ACTIVATE

DATASET ACTIVATION

Calendar view for MAY 2018 and JUNE 2018.

Dataset: Other

Profile: Alpha Brand

Start Date: 05-26-2018

End Date: 06-24-2018

Days Requested: 30 days

REQUESTED DATASET - OTHER

Please select the connections to use for this data source (if the connection you need isn't listed please configure it for this profile via the Connect page): NONE SELECTED

Data Source (please list additional sources): Google Sheet: <https://docs.google.com/spreadsheets/d/WTZWwvpEakMY3YdxF5Te>

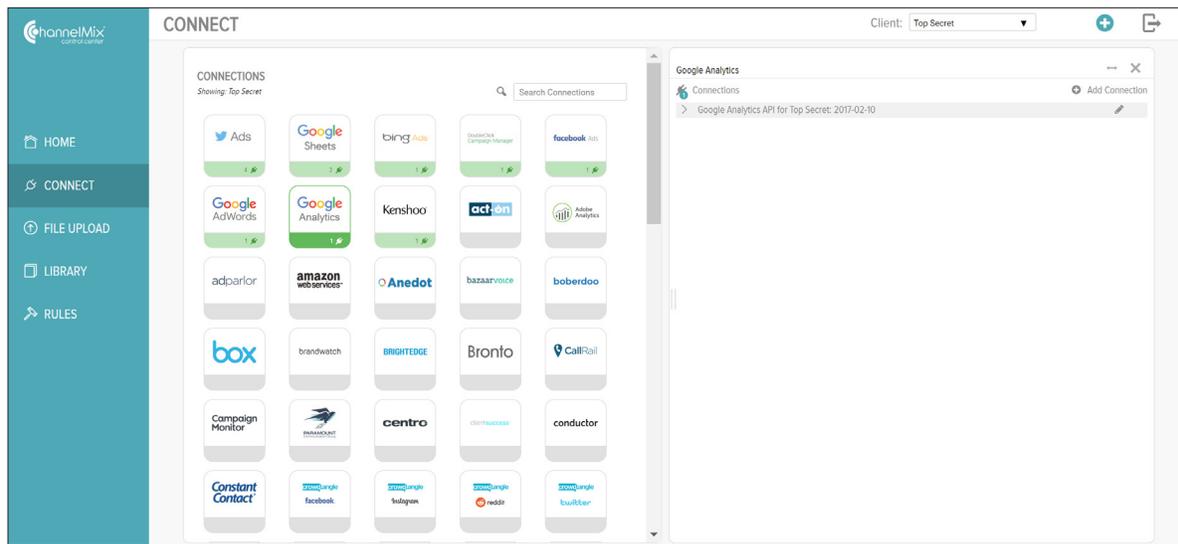
Please enter the names of the fields you'd like included in this dataset: conversions, date, DMA

Please describe any rules or logic to apply to this dataset: exclude TV

CANCEL SUBMIT ZENDESK TICKET TO ACTIVATE

How to Use Dataset Activation Via the Connect Page

Navigate to the Connect page. Click the desired data source. In the slide-out window, you'll see all the profiles you've already connected to that source.



Don't see the profile you want? Click Link ChannelMix Profile. You'll see a Select a Profile pop-up — choose the desired profile.

Another pop-up will appear, and you'll be prompted to edit that profile. Click into the Profile field, and you'll be asked to complete the Choose Profile pop-up. Once you've done that, click OK.

You should now be back at the Edit Profile pop-up. If you only want to connect the profile to that data source, you can just click Save. If you want to create a dataset, too, click Save and Activate Dataset — you'll then see the Dataset Activation pop-up.

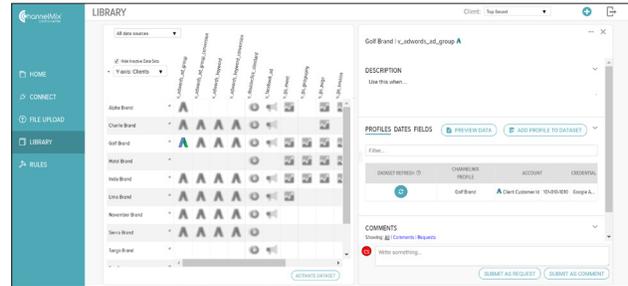
The Profile field will already be filled in. But you'll need to click into the Dataset field and select your desired dataset. Once you've done that — and selected the dates for this dataset — click Activate.

Again, you should see a new pop-up confirming that you've activated your new dataset. Click OK.

Add a Profile to a Dataset That's Already Activated

Navigate to the Library page, and click the desired dataset's icon. (Because it's already activated, the icon won't be transparent.)

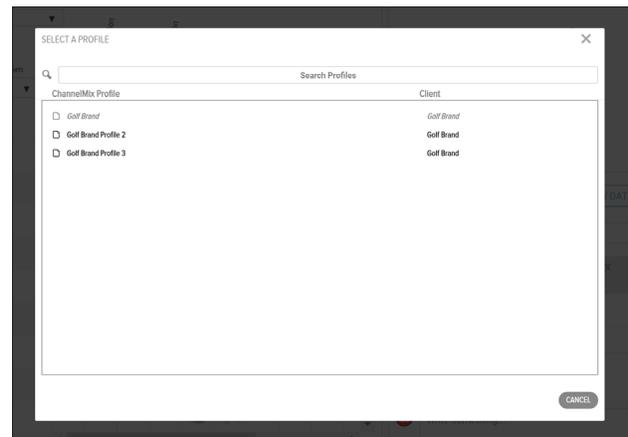
Once you've clicked the correct icon, a flyout window will appear on the right side of the screen. Click the Add Profile to Dataset button.



The Dataset Activation pop-up will appear. Click into the Profile field. The next pop-up, Select a Profile, will show a list of potential profiles. (Note: If a profile is in italic text, it has already been activated and can't be selected now.) Click on your desired profile.

You'll be taken back to the Dataset Activation pop-up. You can adjust the date range. Then click Activate.

A pop-up will confirm that you've started the activation process.



Any Questions or Suggestions?

We love feedback, and we're always available to help! You can reach our team by submitting a Zendesk ticket or contacting your Client Solutions representative directly. Thank you for using ChannelMix Control Center!