



Hello. We're Claravine.

Let's Talk About the Admin Dataset View!

INTRODUCTION



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AGENDA

01 Dataset View

A fundamental area of the platform for admins

02 What's New

Features and functionality

03 See It In Action

Follow-along + Q&A

04 Want More?

Additional resources

Take a minute to login now so you can follow along!

01 Dataset View

A fundamental area of the platform for admins





The Dataset View is an Admin's Best Friend

Templates / Display

Naming Conventions: Campaign Name

Data Submissions Integrations Pending Validations Approval Requests

Search (enter) Last Updated: Sep 2, 2022 8:41 AM

Filters Columns

	<input type="checkbox"/>	GCM - CAMPAIGN NAME <small>Pattern</small>	BUDGET OWNER <small>List</small>	TEAM <small>List</small>	AGENCY <small>List</small>	AUDIENCE TARGET <small>List</small>	CHANNEL <small>List</small>	REGION <small>List</small>
1	<input type="checkbox"/>	BRAND-LMG-DIS-APAC-AU-PRO-MIDDLE-202...	Global	Brand	Lions Media Group	Prospecting	Display	APAC
2	<input type="checkbox"/>	ECOMM-MMT-DIS-EMEA-GB-BHVL-MIDDLE-2...	Global	Ecomm	Mobile Media Team	Behavioral	Display	EMEA
3	<input type="checkbox"/>	BRAND-LMG-PS-APAC-AU-BHVL-UPPER-2021...	Global	Brand	Lions Media Group	Behavioral	Paid Search	APAC
4	<input type="checkbox"/>	BRAND-LMG-PS-APAC-AU-PRO--2021Q1	Global	Brand	Lions Media Group	Prospecting	Paid Search	APAC
5	<input type="checkbox"/>	ECOMM-MMT-DIS-APAC-CN-DEM-UPPER-202...	Regional	Ecomm	Mobile Media Team	Demographic	Display	APAC
6	<input type="checkbox"/>	BRAND-LMG-DIS-EMEA-DK-PRO--2021	Global	Brand	Lions Media Group	Prospecting	Display	EMEA
7	<input type="checkbox"/>	BRAND-LMG-PS-EMEA-FR-PRO-UPPER-2021Q1	Global	Brand	Lions Media Group	Prospecting	Paid Search	EMEA
8	<input type="checkbox"/>	BRAND-LMG-DIS-APAC-AU-RTG-UPPER-2021...	Global	Brand	Lions Media Group	Retargeting	Display	APAC
9	<input type="checkbox"/>	BRAND-LMG-EM-APAC-JP-BHVL-UPPER-2021...	Global	Brand	Lions Media Group	Behavioral	Email	APAC
10	<input type="checkbox"/>	BRAND-LMG-PS-APAC-KR-PRO-UPPER-2021Q2	Regional	Brand	Lions Media Group	Prospecting	Paid Search	APAC
11	<input type="checkbox"/>	BRAND-LMG-PS-APAC-AU-PRO-UPPER-2021Q2	Global	Brand	Lions Media Group	Prospecting	Paid Search	APAC
12	<input type="checkbox"/>	BRAND-LMG-DIS-NA-CA-PRO-UPPER-2021Q2	Global	Brand	Lions Media Group	Prospecting	Display	NA
13	<input type="checkbox"/>	BRAND-LMG-PS-APAC-AU-RTG-UPPER-2021Q2	Global	Brand	Lions Media Group	Retargeting	Paid Search	APAC
14	<input type="checkbox"/>	ECOMM-LMG-EM-EMEA-FR-PRO-MIDDLE-202...	Regional	Ecomm	Lions Media Group	Prospecting	Email	EMEA
15	<input type="checkbox"/>	ECOMM---APAC-JP--2021Q1	Global	Ecomm				A

All the data that has ever been submitted on a template in one view

Access & View All Submission Data in a Dataset

Templates

Templates Submissions Pending Search Approval Requests

Display

Name	Last Updated ↓	Description	Actions
IDs and Names and Metadata. CM360 Inbound	11/21/22	IDs and Names and additional fields imported from CM360	🔍 ☰ ☆
Display Template	11/04/22		🔍 ☰ ☆
Naming Conventions. Creative Name	08/15/22	Creative Agency to use to create creatives for ad ops to traffic.	🔍 ☰ ☆
Naming Conventions. Campaign Name	08/12/22	Creative Agency to use to create campaigns for ad ops to traffic.	🔍 ☰ ☆
IDs and Names. CM360 Inbound	08/09/22	IDs and Names imported from CM360	🔍 ☰ ☆

Who can access datasets?

Admins can view, filter, and edit from a full view of submitted data on each template

Where do I access datasets?

Click the ☰ icon in the Actions column for the Template to view

Why does this matter?

- See data in full and move away from individual submission thinking (1 row, 5 rows)
- Use filters and sorting to find the data you're looking for, or take action on the data
- Look for individual submissions, pending submissions, and more from in a single location

Naming Conventions: Campaign Name

Data Submissions Integrations Pending Validations Approval Requests

Search (enter) Last Updated: Nov 17, 2022 3:23 PM

Filters Columns

	GCM - CAMPAIGN NAME	BUDGET OWNER	TEAM	AGENCY	AUDIENCE TARGET	CHANNEL	REGION
1	BRAND-LMG-DIS-APAC-AU-PRO-MIDDLE-2022Q2	Global	Brand	Lions Media Group	Prospecting	Display	APAC
2	ECONMMAMT-DIS-EMEA-GB-BHVL-MIDDLE-2021	Global	Ecomm	Mobile Media Team	Behavioral	Display	EMEA
3	BRAND-LMG-PS-APAC-AU-BHVL-UPPER-2021Q2	Global	Brand	Lions Media Group	Behavioral	Paid Search	APAC
4	BRAND-LMG-PS-APAC-AU-PRO-2021Q1	Global	Brand	Lions Media Group	Prospecting	Paid Search	APAC
5	ECONMMAMT-DIS-APAC-CN-DEM-UPPER-2021Q1	Regional	Ecomm	Mobile Media Team	Demographic	Display	APAC
6	BRAND-LMG-DIS-EMEA-OK-PRO-2021	Global	Brand	Lions Media Group	Prospecting	Display	EMEA

02

What's New

Features and functionality for
admins to better manage datasets



Sort and Filter to Find Specific Data Faster

The screenshot displays a data table with the following columns: GCM - CAMPAIGN NAME, BUDGET OWNER, TEAM, and AGENCY. The table contains six rows of data. A dropdown menu is open for the 'AGENCY' column, showing options to sort (Sort A → Z, Sort Z → A) or filter. Another dropdown menu is open for the 'TEAM' column, showing a 'Quick Filter' option. A third dropdown menu is open for the 'AUDIENCE TARGET' column, showing various filter operators like 'Has errors', 'Empty', 'Is not empty', 'Equals', 'Does not equal', 'Contains', 'Does not contain', 'Starts with', 'Ends with', 'In', and 'Not In'.

How do I sort and filter?

Select the **Filter icon** on any field to sort the data table by this column, or add a filter to view a subset of data

Why does this matter?

Filter by multiple fields to find the specific data you're looking for, making it easier to bulk edit or validate submission data

! Important note

Right-click on a cell to apply **Quick Filters** (pre-fill the filter value with what you've selected) so you don't have to enter it manually



Validate & Audit More Clearly with **Visible Columns**

PARENT CAMPAIGN NAME	PARENT CAMPAIGN ID	CAMPAIGN NAME	CAMPAIGN ID	CAMPAIGN TYPE	START DATE
CV028434	FY20 - Outbound	7014P000001mVla	FY20 - Toronto	7014P000001n6TA	Event
CV022e9e7	FY20 - Outbound	7014P000001mVla	FY20 - Seattle	7014P000001n0J9	Event
CV04a8e9f					

Columns Configuration Dialog:

- Claravine ID
- Parent Campaign Name
- Parent Campaign ID
- Campaign Name
- Campaign ID
- Campaign Type
- Start Date
- End Date
- Properties

What do we mean by visible columns?

Temporarily adjust which fields of data are included when viewing a dataset. Choose which fields you want to show or hide, and you can even show hidden fields

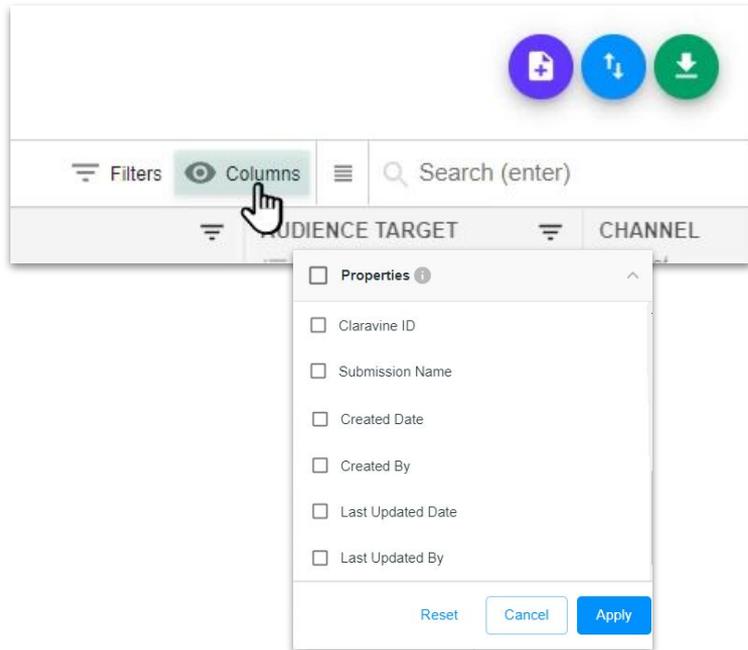
Why does this matter?

More specific views for fast auditing & validation

! Important note

Every change to the visible columns updates in the URL. Copy and share the link to other Admins to see the same view without manually applying the same selections. Bookmark the link for future use

Locate Submission Data with Row Properties



What are row properties?

In the data tab of a dataset, temporarily view row-level submission information

Why does this matter?

View who created or last updated a row of data, when, and where it can be found among submitted datasets, making it easy to determine the data owner and submission location

! Important note

Every row property field temporarily added to your view updates the URL. Copy and share the link to other Admins to see the same view without manually applying the same selections. Bookmark the link for future use



Export More Specific, Tailored Data Views

Naming Conventions: Campaign Name

Data Submissions Integrations Pending Validations Approval Requests

Search (enter) Last Updated: Nov 17, 2022 3:23 PM

	GCM - CAMPAIGN NAME	BUDGET OWNER	TEAM	AGENCY	AUDIENCE TARGET	CHANNEL	REGION
1	BRAND-LMG-DIS-APAC-AU-PRO-MIDDLE-2022Q2	Global					AC
2	ECOMM-MMT-DIS-EMEA-GB-BHVL-MIDDLE-2021	Global					EA
3	BRAND-LMG-PS-APAC-AU-BHVL-UPPER-2021Q2	Global					AC
4	BRAND-LMG-PS-APAC-AU-PRO-2021Q1	Global					AC
5	ECOMM-MMT-DIS-APAC-CN-DEM-UPPER-2021Q1	Regional					AC
6	BRAND-LMG-DIS-EMEA-DK-PRO-2021	Global					EA

Export Data

File Configuration: Current View

Select file type:

CSV

XLSX

Cancel Export

What will be exported?

Once you've adjusted the visible columns and row properties, applied any filters and sorting, you can export only this subset of data

Why does this matter?

Export only the data that is needed (nothing more)

! Important note

If the template has an outbound configuration such as AWS S3, SFTP, Box, email, etc. you can select it in the File Configuration drop-down menu



Duplicate Row Data Saving Time and Effort

Naming Conventions: Campaign Name

Data Submissions Integrations Pending Validations Approval Requests

Search (enter) Last Updated: Oct 28, 2022 5:05 PM Filters Columns X + Edit 2 rows

	DCM - CAMPAIGN NAME	BUDGET OWNER	TEAM	AGENCY	AUDIENCE TARGET	CHANNEL	REGION
1	ECOMM-LMG-SOC-EMEA-DE-	Global	Ecomm	Lions Media Group	Demographic	Paid Social	EMEA
2	BRAND-LMG-PS-APAC-AU-BH-	Global	Brand	Lions Media Group	Behavioral	Paid Search	APAC
3	BRAND-LMG-PS-APAC-						APAC
4	BRAND-LMG-PS-EM-						EMEA

Filters Columns X + Edit 2 rows

TARGET	CHANNEL	REGION
	<i>List</i>	<i>List</i>
	Paid Social	EMEA

What can be duplicated?

Select from already submitted rows of data, duplicate them, and create a new submission with data prefilled

Why does this matter?

Reduces time spent (and possible errors) from having to re-enter data over, and over, and over...



Create a New Submission

Naming Conventions: Campaign Name

Data Submissions Integrations Pending Validations Approval Requests

Search (enter) Last Updated: Nov 17, 2022 3:23 PM

	GCM - CAMPAIGN NAME	BUDGET OWNER	TEAM	AGENCY	AUDIENCE TARGET	CHANNEL	REGION
1	BRAND-LMG-DIS-APAC-AU-PRO-MIDDLE-2022Q2	Global	Brand	Lions Media Group	Prospecting	Display	APAC
2	ECOMM-MMT-DIS-EMEA-GB-BHVL-MIDDLE-2021	Global	Ecomm	Mobile Media Team	Behavioral	Display	EMEA
3	BRAND-LMG-PS-APAC-AU-BHVL-UPPER-2021Q2	Global	Brand	Lions Media Group	Behavioral	Paid Search	APAC
4	BRAND-LMG-PS-APAC-AU-PRO-2021Q1	Global	Brand	Lions Media Group	Prospecting	Paid Search	APAC
5	ECOMM-MMT-DIS-APAC-CN-DEM-UPPER-2021Q1	Regional	Ecomm	Mobile Media Team	Demographic	Display	APAC
6	BRAND-LMG-DIS-EMEA-DK-PRO-2021						EMEA

Templates / Display / Naming Conventions: Campaign Name

Untitled Submission

Submission name is required.

	GCM - CAMPAIGN NAME	BUDGET OWNER	TEAM	AGENCY
1				
2				
3				
4				
5				

Missing a Row of Data?

After you have filtered and sorted the data, quickly create a new submission using the manual submission table or by importing a file

Why does this matter?

You don't have to navigate back to create a new submission or import. Instead, do it directly from the place where you're already auditing



View Individual Submissions

Templates / Display

Naming Conventions: Campaign Name

Data **Submissions** Integrations Pending Validations Approval Requests

Search

Submission Name	Rows	Created By	Last Submitted ↓	Status
Demo Campaign Name	1	Ethan Lowe	11/17/22	Success
Lions Media_Paid Search_2021Q2	1	Rebekah Garner	10/28/22	Success
Demo Submission - May 2022	1	Ethan Lowe	05/09/22	Success

What can be seen in Submissions?

Each submission that has been created on a template

Why does this matter?

Quickly see the number of rows, creator, last submission date, and click the row to open the submission



View Integrations on a Template

Templates / Social

Paid Social: Facebook | Instagram

Data Submissions **Integrations** Pending Validations

Installed Integrations

These are the integrations that are currently assigned to run on your template

The screenshot displays three integration cards, each with a logo, title, description, status, and action button:

- Card 1:** Google Cloud Services logo. Title: "[Paid Social: Fac...". Description: "Sends a file to Google Cloud Services". Status: "Active" with a checkmark and "Pushes data" with a cloud icon. Button: "Edit Integration".
- Card 2:** S3 logo. Title: "[Paid Social: Fac...". Description: "Sends a file to S3". Status: "Active" with a checkmark and "Pushes data" with a cloud icon. Button: "Edit Integration".
- Card 3:** S3 logo. Title: "S3 Loop: Campai...". Description: "Sends a file to S3". Status: "Active" with a checkmark and "Pushes data" with a cloud icon. Button: "Edit Integration".

What can be seen?

All inbound and outbound integrations implemented on a template

Why does this matter?

Quickly see which account type is applied, whether it is inbound or outbound, and click *Edit Integration* to swiftly navigate to the template

Check out Pending Submissions

Templates / Display

Naming Conventions: Campaign Name

Data Submissions Integrations **Pending** Validations Approval Requests

Search

Modified	Name	Created By	Rows	Status	Actions
04/19/22		Rebekah Garner	1	Draft	
05/07/22		Rebekah Garner	1	Draft	
04/25/22	APAC Lions Media - Question for Rebekah	Rebekah Garner	1	Shared Draft	
10/31/22	Campaign_Name_AgencyX.csv	Rebekah Garner	137	Paused - With Errors	
06/12/22	Mobile Media Team Retargeting 2022Q3	Rebekah Garner	1	Awaiting Approval	
06/12/22	EMEA_Lions Media Group_032022	Rebekah Garner	1	Awaiting Approval	

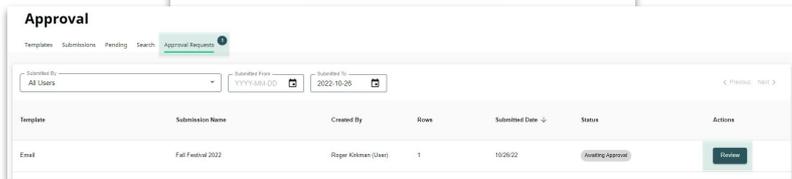
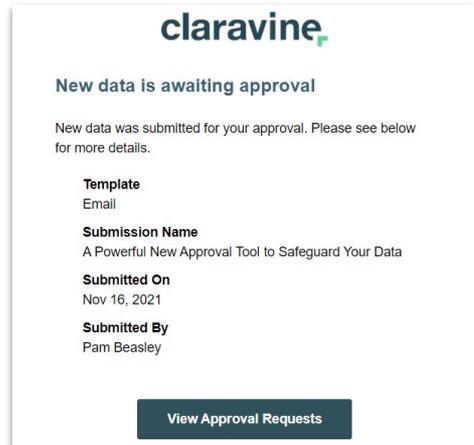
What Submissions will I see?

Your owned drafts, drafts owned by others that have been shared with you, imported files that have failed, inbound integration submissions, and any submissions that are waiting for approval if you have that feature enabled

Why does this matter?

It's important to have insights into failed submissions, consistent errors users are running into, and paused inbound integration data waiting for action. You can easily see who owns the submission and who you need to talk to

Respond to Approval Requests



What is the approval feature?

The approval feature* can be enabled to alert one or many designated administrators that they need to review and approve or reject submission data before it can be fully processed

Why does this matter?

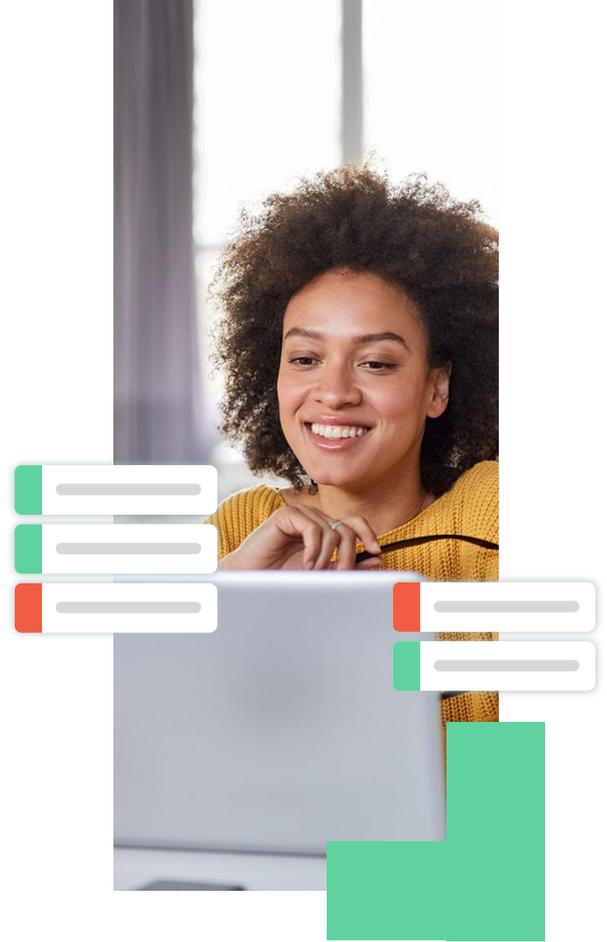
This provides an extra layer of optional template-by-template, manual validation before new or altered data begins to flow across your ecosystem. It also requires additional resources to support reviews so should be weighed against other existing platform safeguards

**Only available for specific contract types*

claravine₊

03 See It In Action!

Time to follow along



A rectangular button with a grey background and a green border, containing the text "Q&A" in white.

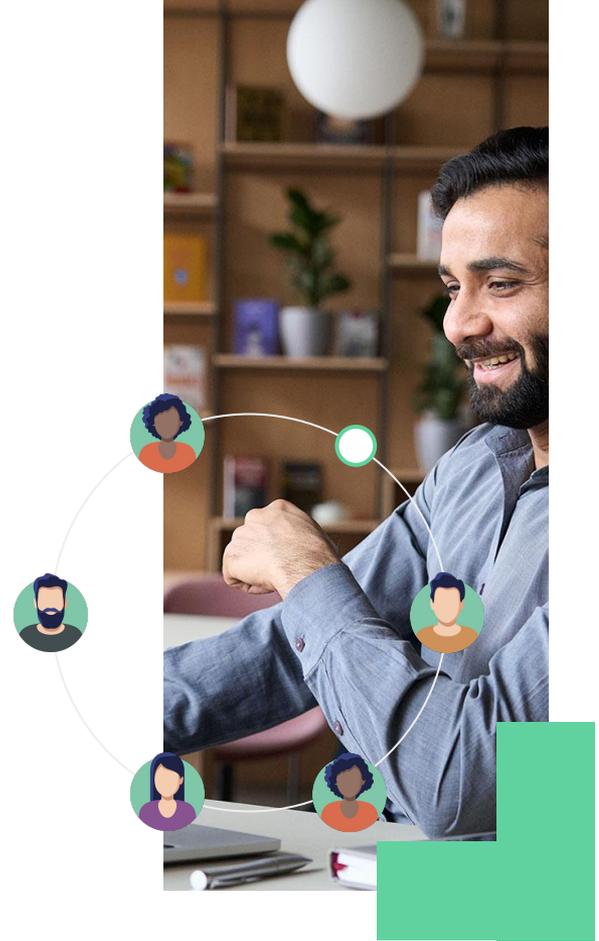
Q&A

Use the Q&A tab to submit anonymous questions



04 Want More?

Additional Resources



Additional Resources

[Claravine Support](#) (Recently refreshed!)

- Submit a request
- Access Knowledge Base documentation and API documentation
- Contact sales
- View our interactive demo
- See FAQs
- Check platform status

Documentation for today's training

- [Dataset View Overview](#)
- [Column Visibility in Dataset View](#)
- [Row Properties](#)
- [Export Data from Dataset View](#)
- [Filtering the Dataset View](#)





Align Ad Campaign Data for Faster Insights with New Connectors



Google Ads



Pinterest Ads Manager

Beta



Snapchat Ads Manager

Beta



Amazon Ads

Beta



TikTok Ads

Beta

What integrations are new?

Google Ads is generally available, with other offerings ready for Beta testing

Why does this matter?

Expands options for inbound workflows with these platforms - helping you as you enrich and validate data

What do I do if I'm interested?

Contact your CSM or [submit a support request](#)

We Appreciate You!



Customer stories

Stay tuned for what we love about our customers on LinkedIn!

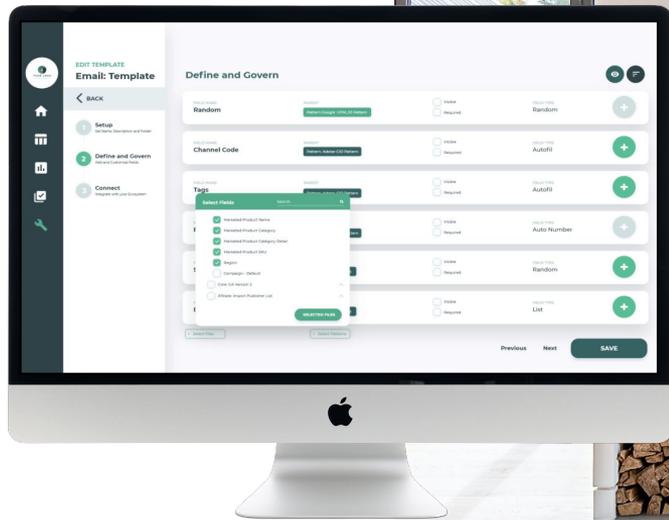
Share your story anytime!

Schedule a [user listening session](#) to share feedback on your experience with us.

2/14 Customer Love Day

Keep your eye out for an email and in-platform announcement to claim exclusive Claravine swag.

claravine_r



YOUR DATA

Thank You

