Optimizely Visitor Intelligence Description

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1. Subscription Description

The Optimizely Visitor Intelligence Software Service enables the users to view profile and event data in Optimizely Visitor Intelligence, collected across all channels, including but not limited to: online, mobile, and email. The data can be enriched by data from other channels such as in-store and call center.

A user can filter on profile properties, and store filters as segments, for use across the Optimizely platform or in custom applications.

1.1 Events

1.1.1 Tracking

Optimizely Visitor Intelligence allows for tracking of your events either via the .NET integration package or directly via the tracking REST API. See more information in the Tracking API topic on Optimizely World.

1.1.2 Querying

The event data in the Optimizely Visitor Intelligence can be queried via the event REST API, which follows the Microsoft REST API Guidelines. See more information in the Profile Store API topic on Optimizely World.

1.1.3 Viewing in the Optimizely Visitor Intelligence user interface

Event data can be viewed for each aggregated profile in the detail view of the Optimizely Visitor Intelligence user interface. For more information on the user interface, see the User Guide on Optimizely World.

1.2 Profiles

When events are being tracked into the Optimizely Visitor Intelligence , the information is aggregated onto profiles that may be queried via the profile REST API, which follows the Microsoft REST API Guidelines. See more information in the Profile Store API topic on Optimizely World.

1.3 Segments

Segments are stored and named profile queries that can be used for efficiently targeting members, who are currently fulfilling the query criteria. For more information on how to create and use segments in the Profile Store, see the Profile Store API topic on Optimizely World. For more information on segments in the Optimizely Visitor Intelligence user interface, see the Optimizely Visitor Intelligence User Guide on Optimizely World.

1.4 Visitor Group personalization

Segments can be enabled for use as Visitor Group criteria in the built-in Optimizely CMS personalization. For more information on how to work with Optimizely CMS Visitor Groups, see the Optimizely CMS Personalization topic on Optimizely World. For more information on how to use segments in Optimizely CMS Visitor Groups, see the Optimizely Visitor Intelligence User Guide on Optimizely World.

2. Definitions

2.1 Subscription

Means the arrangement by which a Customer is granted access to the Optimizely Visitor Intelligence Software Service and the tracking infrastructure required to collect and store the data in Optimizely Visitor Intelligence.

2.2 Business Day

Means every day from Monday to Friday except 1) if Customer's primary business is domiciled in the Americas - Public / Federal holidays in the United States of America, 2) if Customer's primary business is domiciled in Europe, Africa or the Middle East – Public holidays in Sweden and Germany, or 3) if Customer's primary business is domiciled in Asia-Pacific, including Australia and New Zealand – Public holidays in Australia.

3. Service Architecture

More detailed information that describes the architecture of the Optimizely platform, along with an introduction to the system foundation and related components and products, is available in Technical Overview on Optimizely World.

3.1 Service Instances

All Subscriptions include one or more instances that are typically used to align with deployment stages as follows.

3.1.1 Integration stage

Supporting integration environments, such as daily builds or continuous releases. Here, customers can validate initial integrations with external systems and perform functional testing.

3.1.2 Preproduction stage

A separate instance that can be used for UAT, load testing, or approved penetration testing.

3.1.3 Production stage

Once a Customer implementation is production-ready and deployed, a separate production instance is used for tracking real events.

3.1.4 Developer Guidelines

See the Optimizely Developer Guides on Optimizely World for information about developing, deploying, and working with the Optimizely Visitor Intelligence Service.

3.2 Third-Party Platform Providers

Optimizely Visitor Intelligence Software Services require third-party providers to provide certain infrastructure or components, and those may require the user to adhere to terms and conditions as well. The following third-party service providers are part of the subscription.

3.2.1 Microsoft Azure™

http://www.microsoftvolumelicensing.com/Downloader.aspx?DocumentId=9555

4. Service Requirements

Optimizely Visitor Intelligence is built on Optimizely and Microsoft Azure technologies. The integration to the Optimizely platform for Visitor Group personalization and visualizations, as well as the native integration packages, all have their environment requirements. The Service itself, however, is accessible via a series of standards-compliant REST APIs.

4.1   Supported Versions of Optimizely Software

See the Optimizely Personalization Service Requirements topic on Optimizely World for required software versions.

5. Features of the Visitor Intelligence Service

5.1   Optimizely Visitor Intelligence / Profile Store

Optimizely Visitor Intelligence relies on the Profile Store portion of Optimizely Visitor Intelligence data store. This data store is where the event stream data from the Customer's touchpoints is collected and aggregated into profiles, used for querying and segmenting. The data is used in applications, such as rules-based personalization via Optimizely CMS Visitor Groups.

The profile data in the Optimizely Visitor Intelligence can be queried via the profile REST API, which follows the Microsoft REST API Guidelines. See more information in Profile Store API on Optimizely World.

5.2   Native Integration

Native integration packages are available to allow tracking from and integration to other features of the Optimizely Digital Experience platform. See more information in the Optimizely Profile Store Developer Guide on Optimizely World.

5.3   Optimizely Visitor Intelligence user interface

Optimizely Visitor Intelligence has a user interface that is accessible from within the Optimizely platform. Here, profiles can be viewed, filtered, divided into dynamic segments, and detailed information about any visitor can be events viewed. For more information on the Optimizely Visitor Intelligence user interface, see the Optimizely Visitor Intelligence User Guide on Optimizely World.

5.4   Optimizely CMS Visitor Groups rules-based personalization

Optimizely Visitor Intelligence integrates with Optimizely CMS Visitor Groups. This integration supports the use of profile segments as criteria for rules-based personalization. For more information on how to use segments as a Visitor Group criteria, see the Optimizely Visitor Intelligence User Guide on Optimizely World.

6. Consulting and Training

6.1   Expert Services

Optimizely's Expert Services team helps ensure that customers and partners are successful in implementing Optimizely's Visitor Intelligence features. Expert Services is a global team of consultants who can be contracted to provide best practices guidance or hands-on support to assist the project team in deploying successful projects with Visitor Intelligence.

Contact Optimizely Expert Services by email at expert.services@optimizely.com or online.

6.2   Onboarding

Upon ordering the Visitor Intelligence Software Service, Optimizely Managed Services will ensure that the Customer receives access to Services included in the Subscription.

6.3   Training and online help

Optimizely offers both business user and developer training at an additional cost. Training may be ordered from an Optimizely sales representative or from the self-service website.

Optimizely also offers online help and has a robust community of active members at Optimizely World.

7. Optimizely Support

Please refer to the Optimizely Services SLA for more information.

8. Service Health and Continuity

Optimizely provides a service dashboard, where Customers can register to receive incident updates and view information about platform-wide planned maintenance.

Optimizely Managed Services and Support communicate incidents regarding Customer specific applications and websites. Customers are notified by email regarding issues and are continuously updated during the progress of the incident.

8.1   Backup copying and loss of data.

Optimizely takes responsibility for making daily backup copies of the production data in the Subscription. Optimizely takes the responsibility for saving these backup copies for thirty-five (35) days. Thereafter, Optimizely takes no responsibility for the backup copied information.

8.1.1 Additional backup

If Optimizely shall take responsibility for the backup copying of other data and/or to any extent other than that stated in the Service Description, such obligation shall be specifically agreed to in writing between Optimizely and the Customer.

8.1.2 Responsibility for loss or distortion of data

Over and above the responsibilities that Optimizely has taken on in accordance with section 8.1, Optimizely takes no responsibility for any loss or distortion of information/data.

8.2 Backup and Retention Schemes

Customer data is backed up every twenty-four (24) hours with monitoring and verification. The daily backups are restored to a server in production, with reports kept for two weeks. The daily backup is kept in the production cluster. Historic backups are archived for 35 days, to ensure availability of the backups in the event of disaster.

8.3 Disaster Recovery

Depending on the cause, the maximum time of changes that may be lost is 24 hours. See Backup and Retention Schemes above for further details.

8.3.1 Recovery Point Objective (RPO)

RPO is 24 hours.

8.3.2 Recovery Time Objective (RTO)

Please refer to the Optimizely Services SLA for target objectives.

8.4 Monitoring

Service health is monitored continuously, and any irregularities will be acted upon in line with the Service Level Agreement.

9. Service Level Agreement

Please refer to the Optimizely Services SLA for more information.

10. Roles and Responsibilities

See the Roles and Responsibilities Matrix for more information.

11. Compliance

For information about compliance see the Optimizely Trust Center. Optimizely Data Platform follows Microsoft Azure compliance standards, and therefore our infrastructure has a wide range of compliance certifications, standards, and supporting processes.

11.1 Data Privacy

Optimizely allows you to process and/or store PII data but not sensitive personal information (as defined by EU GDPR) in the Content Cloud and the Commerce Cloud products in the Customer-Centric Digital Experience Platform Service.

Customers who require additional controls relating to protecting provided PII data can opt for the Geofencing optional configuration. If PII data is stored and/or processed, Optimizely can provide a geo-fenced option to help provide compliance with Schrems ii legislation. This option changes certain aspects of the Service Level Agreement (SLA) around support hours and response times. Please content your salesperson or Customer Success Manager if this is of interest.

12. Ordering and Validity

12.1 Ordering of the Service

When a Customer places an order with an Optimizely sales representative, Optimizely provisions the systems. Contact your Optimizely sales representative or the local office to order.

12.1.1 Provisioning time

If all necessary data to provision this Software Service(s) has been included in the Order, Optimizely has a target of provisioning the Customer's Software Service(s) within 24 hours during business days after the Order has passed all checkpoints within the Order Management System and reached Optimizely Managed Services.

12.2 Validity and duration of the Service Description

This Service Description shall remain valid as a description of Software Service(s) a Customer may purchase and/or receive from Optimizely through the term of any related agreement between the parties, and may be subject to further updates, under the notice provisions of such agreements. Under such notice provision, Optimizely reserves the right to update or

replace it as necessary at any time. Changes made to the Service Description or any new Service Description (for example, a replacement of the previous one) shall always enter into force from the date of their publication on the page, or from such notice provision in the agreement, which may apply. http://world.optimizely.com/services/descriptions/optimizely-Visitor-Intelligence-service-description/.

Appendix 1 - Changelog Summary

In this appendix you will find a summary of the changes that were communicated at times defined below. However, since clarifications may have been made in addition to the changes made in this appendix, it is still important that you read through the relevant Service Description(s).

Changes for distribution Aug 2nd, 2021

Brand Change
- Changed brand from Episerver to Optimizely throughout.