

IBM Unica Optimize
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Installation Guide



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Preface

- [Contacting IBM Unica technical support](#)

Contacting IBM Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

Information you should gather

Before you contact IBM Unica technical support, you should gather the following information:

- A brief description of the nature of your issue.
- Detailed error messages you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System Information" below.

System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under each application's installation directory.

Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (<http://www.unica.com/about/product-technical-support.htm>).

1 Preparing to Install IBM Unica Optimize

- [About the installation process](#)
- [IBM Unica Optimize basic installation checklist](#)
- [IBM Unica components and where to install them](#)
- [Prerequisites](#)
- [If you are upgrading or configuring multiple partitions](#)

About the installation process

Installing IBM Unica products is a multi-step process that involves working with a number of software and hardware elements that are not provided by IBM Unica . While the IBM Unica documentation provides some guidance regarding specific configurations and procedures required to install IBM Unica products, for details on working with these systems that are not provided by IBM Unica you should consult those products' documentation.

Before you begin to install the IBM Unica Marketing software, you should have engaged in a planning process that takes into consideration both your business objectives and the hardware and software environment required to support them.

IBM Unica Optimize basic installation checklist

Read this chapter to gain an overview of the installation process and verify that your environment, planned order of installation, and knowledge levels fulfill the prerequisites.

The following list is a high-level overview of the steps required to perform a basic installation of Optimize. Additional detail about these steps are provided in the rest of this guide.

Install Optimize

1. [Download the IBM Unica installers](#)

Download the IBM Unica and Optimize installers.

2. [Step: Obtain required information](#)

Gather the required information for the installation. You use this information to complete the installation wizard.

3. [Step: Run the IBM Unica installer](#)

After you have installed, deployed, and verified the IBM Unica Marketing Platform and IBM Unica Campaign, install Optimize.

Configure Optimize

1. [Step: Create and populate the Optimize system tables manually, if necessary](#)

If the Optimize installer was unable to connect to the Campaign system tables, use the provided SQL scripts to create and populate the Optimize system tables in the Campaign database or schema.

2. [Step: Register the product manually, if necessary](#)

If the Optimize installer was unable to register, use Marketing Platform utilities to register manually.

3. [Step: Set the Optimize configuration properties manually, if necessary](#)

If the Optimize installer was unable to set the configuration properties, set required properties on the **Settings > Configuration** page.

4. [Step: Start the Optimize server](#)

Start and verify the Optimize server.

5. [Step: Map tables for Optimize](#)

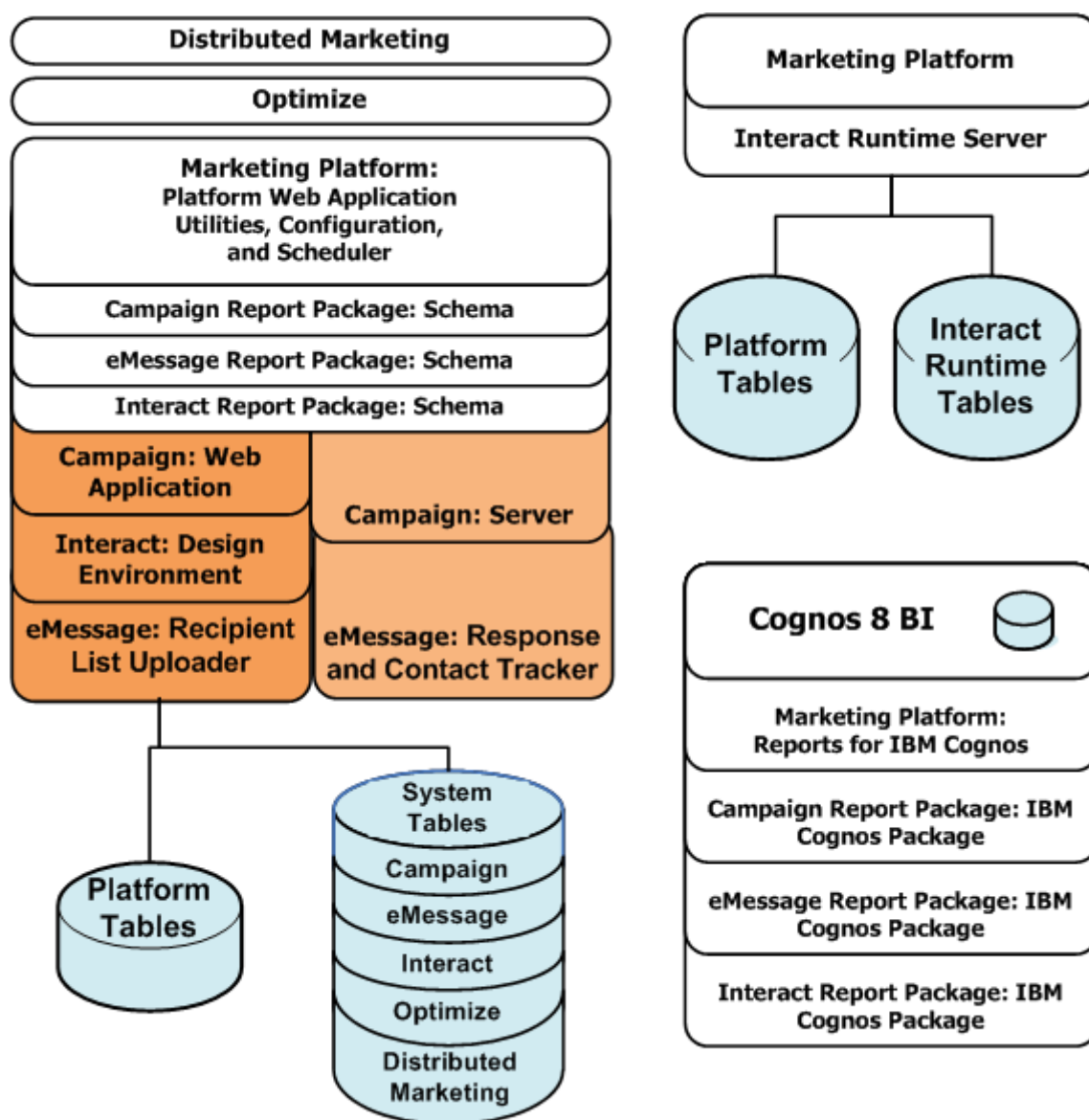
In Campaign, map the Optimize tables.

6. [Step: Verify your Optimize installation](#)

Log in to Marketing Platform and confirm you can access **Campaign > Optimizations**.

IBM Unica components and where to install them

The following diagram provides a brief overview of where to install IBM Unica applications. This is the basic installation that will function. You may require a more complex, distributed installation to meet your security and performance requirements.



Prerequisites

The following are prerequisites for installing IBM Unica Marketing products.

System requirements

For detailed system requirements, see the *Recommended Software Environments and Minimum System Requirements* guide for the IBM Unica Marketing products you plan to install.

JVM requirement

IBM Unica Marketing applications within a suite must be deployed on a dedicated Java™ Virtual Machine (JVM). IBM Unica Marketing products customize the JVM used by the web application server. You may need to create a WebLogic or WebSphere domain dedicated to IBM Unica Marketing products if you encounter JVM-related errors.

Network domain requirement

IBM Unica Marketing products that are installed as a Suite must be installed on the same network domain, to comply with browser restrictions designed to limit cross-site scripting security risks.

Knowledge requirement

To install IBM Unica Marketing products, you must possess or work with people who possess a thorough knowledge of the environment in which the products will be installed, including the operating systems, databases, and web application servers.

Order of installation for Optimize

Optimize operates with the Marketing Platform and Campaign. You must install and configure them before you begin to install Optimize.


IBM Unica Marketing Platform requirement

Before you install any IBM Unica Marketing products, the Marketing Platform must be fully installed and deployed, so that the products you install can register their configuration properties and security roles, and you can set values for configuration properties on the Marketing Platform's Configuration page.

Note that for each group of products that you plan to have work together, you need to install the Marketing Platform only once.

Campaign requirement

Before you install Optimize, you must install and configure Campaign.

 For installations on UNIX, you may need to set the `Djava.awt.headless` property for your web application server to `true` in your application server. This is required only when you are unable to view Optimize reports. See the *IBM Unica Campaign Installation Guide* for details.

You do not need to prepare any additional data sources because Optimize uses the Campaign system tables data source.

Client machines

Client machines should meet the following configuration requirements.

- Campaign uses an ActiveX control for flowcharts and administration functions. This flowchart automatically downloads when needed. The recommended security settings for the Internet Explorer browser is medium-low for local intranet. Specifically, the client browser must have the following options enabled.
 - **Download signed ActiveX controls**
 - **Run ActiveX controls and plugins**
 - **Script ActiveX controls marked safe for scripting**
- The browser should not cache pages. In Internet Explorer, select **Tools > Internet Options > General > Browsing History > Settings** and choose the option that causes the browser to check for a newer version of the page on each visit.
- If pop-up blocker (ad blocker) software is installed on the client machine, Campaign might not function properly. We recommend disabling pop-up blocker software while running Campaign.

Access permissions

Verify that your network permissions allow you to perform the procedures in this guide, and that you have logins with appropriate permissions, including the following.

- The administrative password for your web application server.
- Administration access for all necessary databases.
- Write permission for all files that you must edit.
- Write permission for all directories where you must save a file, such as the installation directory and backup directory if you are upgrading.
- Appropriate read/write/execute permissions to run the installer.
- The operating system account that you use to run the web application server and IBM Unica Marketing components must have read and write access to the relevant directory and subdirectories.
- On UNIX, the user account that installs Campaign and the Marketing Platform must be a member of the same group as Campaign users. This user account must have a valid home directory, and have write permissions for that directory.
- On UNIX, all of the installer files for IBM Unica products must have full execute permissions (for example, `rxwxr-xr-x`).

If you are upgrading or configuring multiple partitions

If you are upgrading, see the sections on preparing to upgrade.

If you plan to create multiple partitions, see the section on configuring multiple partitions.

2 Installing IBM Unica Optimize

- Download the IBM Unica installers
- Copying installation files (DVD only)
- How the IBM Unica Marketing installers work
- Where to install Optimize components
- Step: Obtain required information
- Step: Run the IBM Unica installer

Download the IBM Unica installers

Download the following installation files.

! Place all of the files in the same directory. This is an installation requirement.

- The IBM Unica installer
- The Optimize installer

Setting permissions on UNIX-type systems

On UNIX-type systems, ensure that the installation files have full execute permissions (`rxwxr-xr-x`).

Choosing the right installer file

The IBM Unica Optimize installation files are named according to the version of the product and the operating system with which they are meant to be used, except for UNIX files intended to be run in console mode, which are not operating system-specific. For UNIX, different files are used depending on whether the installation mode is X-windows or console. For example:


Windows - GUI and console mode - `ProductN.N.N.N_win32.exe` is version N.N.N.N and is intended for installation on the Windows 32-bit operating system.

UNIX - X-windows mode - `ProductN.N.N.N_solaris64.bin` is version N.N.N.N and is intended for installation on the Solaris 64-bit operating system.

UNIX - console mode - `ProductN.N.N.N.sh` is version N.N.N.N and is intended for installation on all UNIX operating systems.

Copying installation files (DVD only)

If you received your IBM Unica installation files on a DVD, or if you created a DVD from a downloaded ISO image file, you must copy its contents to a writable directory available to the system on which you will be installing the IBM Unica products before running the installers. You cannot run the installers from a DVD or other read-only volume.

 For additional information on where to place the installation files, see [How the IBM Unica Marketing installers work](#).

How the IBM Unica Marketing installers work

You should read this section if you are not familiar with the basic functions of the IBM Unica installer.

Single directory requirement for installer files

When you install IBM Unica enterprise products, you use a combination of installers.

- A master installer, which has `Unica_Installer` in the file name
- Product-specific installers, which all have the product name as part of their file names

To install IBM Unica Marketing products, you must place the master installer and the product installers in the same directory. When you run the master installer, it detects the product installation files in the directory and lets you select the products you want to install.

When multiple versions of a product installer are present in the directory with the master installer, the master installer always displays the latest version of the product on the IBM Unica Products screen in the installation wizard.

Installing patches

You may be planning to install a patch immediately after you perform a new installation of an IBM Unica product. If so, you should place the patch installer in the directory with the base version and master installer. When you run the installer, you can select both the base version and the patch, and the installer will install both in correct order.

Choosing product installation directories

You can install to any directory on any network-accessible machine. You can specify an installation directory by entering a path or by browsing and selecting it.

You can specify a path relative to the directory from which you are running the installer by typing a period before the path.

If the directory you specify does not exist, the installer creates it, assuming that the user performing the installation has appropriate permissions.

The default top-level directory for IBM Unica installations is named `Unica`. The product installers then install in subdirectories under the `Unica` directory.

Installation types

The IBM Unica installer performs the following types of installation.

- **New installation** – When you run the installer and select a directory where an IBM Unica Marketing product has never been installed, the installer automatically performs a new installation.
- **Upgrade installation** – When you run the installer and select a directory where an earlier version of an IBM Unica Marketing product has previously been installed, the installer automatically performs an upgrade installation. See the Upgrading chapters for details.
- **Re-installation** – When you run the installer and select a directory where the same version of an IBM Unica Marketing product has previously been installed, the installer automatically performs a new installation. This overwrites all of the files in your existing installation directory.

If automatic database table creation is available for the product, and you select it, your data in the system tables is not modified, except for navigation menu items. If you have modified the navigation menu, you should use the Marketing Platform `configTool` utility to export those configuration properties, so you can restore them after you re-install. If you have not modified the navigation menu, you do not need to do anything, as the installer will simply re-create the default menu items.

You may see some errors because the installer will not be able to create tables in the database, as they already exist. You can safely ignore these errors.

Installation modes

The IBM Unica installer can run in the following modes.

- **Console (command line) mode**

In console mode, you enter numbers to select options. If you do not enter a number, but just press **Enter**, the default option is selected.

Default options are indicated by one of the following:

- `[X]`

When this symbol appears, and you want to select an option other than the one it is next to, first enter the number shown next to the symbol to de-select that option, followed by a comma and the number you do want to select.

- `->`

When this symbol appears, and you want to select an option other than the one it is next to, enter the number you want to select. You do not have to de-select the default option explicitly, as you do for the other type.

- Windows GUI or UNIX X-windows mode
- Unattended mode, which allows no user interaction

Unattended, or silent, mode is used when you must install IBM Unica product multiple times, for example when you set up a clustered environment. See [Installing multiple times using unattended mode](#) for more information.

Installing multiple times using unattended mode

If you must install IBM Unica Marketing products multiple times, for example when setting up a clustered environment, you may want to run the IBM Unica installer in unattended mode, which requires no user input.

About the response files

Unattended (also known as silent) mode requires a file or set of files that provides the information that a user would enter in the installer wizard when using GUI or console modes. These are known as response files.

The installer automatically creates these response files when you perform an installation in console mode or Windows GUI or UNIX X-windows modes. Therefore, you would normally run the installer in one of these modes to create the response files before setting up an unattended run.

The response files are named `installer_product.properties`, except for the file for the IBM Unica installer itself, which is named `installer.properties`. The installer creates these files in the directory where the installer is located.

Backup requirement for response files

You must create a backup version of the response files, because each time you run in unattended mode, the installer overwrites the `.properties` files with an empty version of the files. Therefore, you must replace the empty files with your backed-up version each time you run in unattended mode.

Effect of unattended mode when you uninstall

When you uninstall a product that was installed using unattended mode, the uninstall is performed in unattended mode (without presenting any dialogs for user interaction).

Automatic vs. manual system table creation

For some IBM Unica products, the product installer lets you choose whether or not to allow the installer to create the system tables in the database.

If you choose to allow the installer to create the system tables, you must provide information that enables the installer to connect to the product database you created in an earlier step. Typically, this is the database type, the name of the database server, the port on which the server listens, the database name or schema ID, and a login and password for the database.

If you choose to create the system tables manually, you must use your database client to run the SQL scripts provided with your product installation.

Details for manual table creation are provided elsewhere in this guide.

IBM Site ID

The installer may prompt you to enter your IBM Site ID. Your IBM Site ID can be found on the IBM Welcome letter, Tech Support Welcome letter, Proof of Entitlement letter, or other communications sent when you purchased your software.

IBM may use data provided by the software to better understand how customers use our products and to improve customer support. The data gathered does not include any information that identifies individuals.

Where to install Optimize components

For best performance, you should install Optimize on its own machine, where no other IBM Unica Marketing products are installed. Optimize can require significant computation and data processing resources. You will have the greatest control and flexibility for performance-tuning if you operate Optimize in a dedicated environment.

The following table describes the components you can select when you install Optimize.

Component	Description
Optimize Server	The Optimize Server, which runs Optimize sessions. For best performance, you should install this server on a dedicated system.

Step: Obtain required information

Obtain the following information before you start to install Optimize. You use this information as you complete the installation wizard.

JDBC driver on the Optimize machine

Obtain the JDBC driver classpath on the machine where you are installing Optimize. This path should include the name of the jar file.

Marketing Platform information

The installation wizards for each IBM Unica Marketing product must be able to communicate with the Marketing Platform system table database, to register the product.

Each time you run the installer in a new location, you must enter the following database connection information for the Marketing Platform system table database.

- Database type.
- Database host name.
- Database port.
- Database name.
- User name and password for the database account.
- JDBC connection URL to the Marketing Platform database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:

```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_db_name
```

You obtained this information when you created the database or schema.

Campaign information

The installation wizard for Optimize needs to communicate with your Campaign system table database to create the Optimize tables. You must collect the following information about your Campaign installation to enable the installer to set up Optimize database tables and properly configure Optimize.

- Whether or not your Campaign database is configured for Unicode.
- Campaign database type.

If your database type is IBM DB2 and installed on a UNIX system, you also need to supply the DB2 instance path.

If your database type is Oracle, you also need to supply the Oracle home directory.
- Campaign database host name.
- Campaign database port.
- Campaign database name.
- User name and password for the Campaign database account.
- JDBC connection URL to the Campaign database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:

```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_db_name
```

- The name of the machine on which the Campaign web application server is installed.
- The port on which the Campaign application server listens. If you plan to implement SSL, obtain the SSL port.
- The network domain on which your deployment machine resides. For example, mycompany.com.
- The path to CAMPAIGN_HOME.

If you are installing Optimize and Campaign on separate machines, you must mount the Campaign directory for your Campaign installation as a network drive on the machine that hosts Optimize. The `svrstop` utility located in the `bin` directory must have execute permissions on the Optimize host. Define CAMPAIGN_HOME using the fully qualified path to your Campaign installation directory.

Optimize Utilities Settings reference

This section describes the Optimize Utilities Settings window in the Optimize Installation wizard. This information is required only if you want to use the ACOOptAdmin utility on the machine on which you are running the installer.

Field	Description
JDBC Driver Classpath	<p>Enter the fully qualified path for the JDBC driver on your system, including the *.jar file.</p> <p>To specify multiple jar files, separate them with a colon. For example: opt/.../java/db2jcc.jar:/opt/.../java/db2jcc_javax.jar:/opt/.../java/db2jcc_license_cu.jar</p>

Step: Run the IBM Unica installer

Before you run the IBM Unica installer, verify that you have met the following prerequisites.

- You have downloaded the IBM Unica installer and the installers for products you plan to install, and you have put both the IBM Unica and product installers in the same directory.
- You have available the information you gathered as described in [Obtain required information](#).

If you are re-running the installer on a machine where other IBM Unica products are installed, do not reinstall these products.

See the other topics in this section for details about the installer, or if you need help entering information in the wizard.

Run the IBM Unica installer as described here, and follow the instructions in the wizard.

- GUI or X-windows mode

Run the `Unica_Installer` file. On UNIX, use the `.bin` file.

- Console mode

Open a command prompt and from the directory where you downloaded the IBM Unica software, run the `Unica_Installer` executable file as follows.

On Windows, run the `Unica_installer` executable file with `-i console`. For example, `Unica_Installer_N.N.N.N_OS -i console`

On UNIX, run the `Unica_installer.sh` file with no switch.

- Unattended mode

Open a command prompt and from the directory where you downloaded the IBM software, run the `Unica_Installer` executable file with `-i silent`. On UNIX, use the `.bin` file. For example, to specify a response file located in the same directory as the installer:

```
Unica_Installer_N.N.N.N_OS -i silent
```

To specify a response file in a different directory, use `-f filepath/filename`. Use a fully qualified path. For example:

```
Unica_Installer_N.N.N.N_OS -i silent -f filepath/filename
```

For more information about unattended mode, see [Installing multiple times using unattended mode](#).

Optimize and EAR or WAR files

If you are installing Optimize only during this run of the IBM Unica installer, you do not need to create an EAR or WAR file, as there is no Optimize web application.

All of the Optimize GUI elements are contained within the Campaign web application. During the installation, Optimize should register with Marketing Platform, enabling all the Optimize features in Campaign. (If you have errors with installation, see [Step: Register the product manually, if necessary](#).)

If you are installing Optimize with other IBM Unica Marketing applications, follow the instructions for EAR files for the other application.

3 Configuring IBM Unica Optimize

- About Optimize configuration
- Step: Create and populate the Optimize system tables manually, if necessary
- Step: Register the product manually, if necessary
- Step: Set the Optimize configuration properties manually, if necessary
- Configure ACOOptAdmin tool
- Configure Optimize for Chinese, Japanese, or Korean users
- Step: Start the Optimize server
- Step: Map tables for Optimize
- Step: Verify your Optimize installation

About Optimize configuration

Optimize has no stand-alone web application for you to deploy. Complete the Optimize configuration after you install, configure, deploy, and verify your installation of Campaign.

Step: Create and populate the Optimize system tables manually, if necessary

If the Optimize installer could not connect with the Campaign system tables during the installation process, you see an error message that notifies you of this failure. The installation process will proceed, but in this case you must create and populate the Optimize system tables manually.

To create and populate the Optimize system tables, run the SQL scripts listed in this section against the database or schema that holds the Campaign system tables.

The SQL scripts are located in the `ddl` directory under your Optimize installation.

If your Campaign system tables are configured for unicode, use the appropriate script located in the `ddl/unicode` directory under your Optimize installation.

Scripts for creating Unica Optimize tables

Data source type	Script name
IBM DB2	aco_systab_db2.sql
Microsoft SQL Server	aco_systab_sqlsvr.sql
Oracle	aco_systab_ora.sql

There is only one script to populate the Optimize tables, `aco_populate_tables.sql`. There is no unicode equivalent script for the `aco_populate_tables.sql` script used to populate the tables.

Step: Register the product manually, if necessary

If the Optimize installer could not connect with the Marketing Platform system tables during the installation process, you see an error message that notifies you of this failure. The installation process will proceed, but in this case you must import the Optimize information into the Marketing Platform system tables manually. Follow the directions for each product as shown in this section.

The utilities mentioned in these procedures are located in the `tools/bin` directory under your Marketing Platform installation.

To register Optimize manually

If the Optimize installer cannot connect to the Marketing Platform database to register the product, run the `configTool` utility, using the following example commands as guidelines. This imports menu items and sets some configuration properties. Note that you run the utility as many times as there are files. Because there is one file, you must run the utility one time.

```
configTool -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -
f
"full_path_to_Optimize_installation_directory\conf\optimize_navigation.xml"
```

```
configTool -v -i -o -p Affinium|Campaign|about -
f
"full_path_to_Optimize_installation_directory\conf\optimize_subcomponent_ver
sion.xml"
```

All of the Optimize configuration properties are included with Campaign, so there is no need to register any configuration properties.

Step: Set the Optimize configuration properties manually, if necessary

If the Optimize installer could not connect with the Marketing Platform system tables during the installation process, you see an error message that notifies you of this failure. The installation process will proceed, but in this case you must set the following Optimize configuration properties on the **Settings > Configuration** page manually.

- Campaign > unicaACOListener > serverHost
- Campaign > unicaACOListener > serverPort
- Campaign > unicaACOListener > useSSL

Configure ACOOptAdmin tool

You must define `JAVA_HOME` in the ACOOptAdmin tool.

1. Open the `ACOOptAdmin.sh` (UNIX) or `ACOOptAdmin.bat` (Windows) file located in the `bin` directory under your Optimize installation directory for editing.
2. Find `JAVA_HOME` and replace `[Change Me]` with the path to the JAVA directory used by your web application server.
3. Save and close the file.

Configure Optimize for Chinese, Japanese, or Korean users

If you are going to use Optimize with a user who's user name contains Chinese, Japanese, or Korean locales, you need to configure the Optimize server.

1. Open the Optimize server file (`ACOservlet`) located in the `bin` directory under your Optimize installation directory for editing.
2. Remove the comment to set the environment variable `UNICA_ACSYSENCODING` equal to `UTF-8`.

Windows: Remove `@rem` before the following line in `ACOservlet.bat`:

```
@rem set UNICA_ACSYSENCODING=UTF-8
```

UNIX: Remove `#` before the following lines in `ACOservlet.sh`:

```
#UNICA_ACSYSENCODING=UTF-8
#export UNICA_ACSYSENCODING
```


3. Save and close the file.
4. Restart the Optimize server in a new console window if it is running.

If you need to run an Optimize session as a user who does not have a Chinese, Japanese, or Korean character in their user name, you will need to add comments back to the `UNICA_ACSYSENCODING` settings.

Step: Start the Optimize server

You must start the Optimize server before you can use Optimize. To start the Optimize server, run the `ACOServer` script located in the `bin` directory under your Optimize installation.

Run the `ACOServer` script as follows.

On Windows: `ACOServer.bat start`


On UNIX: `./ACOServer.sh start`

To determine whether the `ACOServer` process has started successfully, use the Windows Task Manager or the command `ps -ef | grep unica_aolsnr` on UNIX systems.

Step: Map tables for Optimize

To configure Optimize to work with Campaign, you must map all of the Optimize system tables in Campaign, as well as your contact history and segment membership tables.

For more information about mapping system tables in Campaign, see the *IBM Unica Campaign Administrator's Guide*.

 Mapping the segment membership system tables in Campaign for use with strategic segments is optional. You should map an audience's segment membership system table only if you use the audience with flowcharts or Optimize sessions that use strategic segments.

1. Map all system tables.
2. Map all contact history tables.

There should be a contact history table for each audience level in your Campaign configuration. You must map each contact history table. See the *IBM Unica Campaign Administrator's Guide* for more information about additional contact history tables.

3. (Optional) For each audience that will be used in Optimize sessions that use strategic segments, map the audience's segment membership system table to the database table that defines segment members.

Requirements when using strategic segments.

If you plan to use strategic segments, there should be a segment membership table for each audience level in your Campaign configuration. You must map each segment membership table.

You should create two indexes on the audience segment membership tables. Create the first index on `SegmentID` and create the second on the audience level columns. For example, the `UA_SegMembership` table ships with an index on `CustomerID` and on `SegmentID`.

For more information about system tables and strategic segments, see the *IBM Unica Campaign Administrator's Guide*.

Optimize system table mapping reference

Optimize System Table	Maps to Database Table
Optimize Session Table	UACO_OptSession
Optimize Process Table	UACO_OptimizeProcess
Optimize Run History Table	UACO_SesnRunHist
Optimize Session Segment Table	UACO_SesnSegment
Optimize Offer Segment Table	UACO_OfferSeg
Optimize Session Offer Table	UACO_SesnOffer
Optimize Rule Table	UACO_Rule
Optimize Exception Rule Table	UACO_RException
Optimize Exception Rules Constraint Table	UACO_RExConstraint
Optimize Rules Constraint Table	UACO_RConstraint
Optimize Rule OfferList Table	UACO_ROfferList
Optimize Rule Offer Table	UACO_ROffer
Optimize Rule Segment Table	UACO_RSegment
Optimize Proposed Contact Base Table	UACO_PCTBase
Optimize Proposed Attribute Base Table	UACO_POABase
Optimize Optimized Contact Base Table	UACO_OCTBase

Optimize contact history table mapping reference

System Table	Maps to Database Table
Customer Contact History Table	UA_ContactHistory
Customer Detailed Contact History Table	UA_DtlContactHist

Step: Verify your Optimize installation

To verify you have installed Optimize correctly, log into the IBM Unica Marketing and confirm that you can access **Campaign > Optimizations**. Selecting Optimizations from the menu opens the All Optimize Sessions page where you can manage your Optimize sessions.

After you install Optimize, the Optimize process is available in Campaign for you to use when building Campaign batch flowcharts.

You may need to log out and log into the IBM Unica Marketing after mapping the Optimize tables to display **Campaign > Optimizations**.

4 Configuring IBM Unica Optimize in Multiple Partitions

- [About partitions](#)
- [Setting up multiple partitions for Optimize](#)

About partitions

In the Campaign family of products, partitions provide a way to secure the data associated with different groups of users. When you configure Campaign or a related IBM Unica Marketing application to operate with multiple partitions, each partition appears to application users as a separate instance of the application, with no indication that other partitions exist on the same system.

For IBM Unica Marketing applications that operate with Campaign, you can configure the application only within partitions where you have already configured an instance of Campaign. Application users within each partition can access only the Campaign functions, data, and customer tables configured for Campaign in the same partition.

Setting up multiple partitions for Optimize

You can create multiple partitions to use with Campaign and Optimize. You can use partitions to configure Optimize and Campaign so that different groups of users have access to different sets of Optimize and Campaign data. For more information about configuring and using multiple partitions, see the *IBM Unica Campaign Installation Guide*.

Installing Optimize creates a default partition, `partition1`, under the `Optimize/partitions` directory of the product installation. You can create additional partitions in the same directory.

If you configure Optimize to use multiple partitions, you must also configure Campaign to use multiple partitions. The names of the partitions that you create for Optimize must exactly match the names of the corresponding partitions created for Campaign.

- ✧ You should save a clean copy of the original `partition1` directory to serve as a backup.
-

To set up multiple partitions for Optimize

1. Create your Campaign partitions.
2. Create a directory for each partition you created in Campaign in the `partitions` directory of your Optimize installation.

For example, if you created `partition2` in Campaign, you must create an `Optimize/partitions/partition2` directory.
3. Copy the contents of the `Optimize/partitions/partition1` directory, along with all of its (empty) subdirectories, into the directory you created for the new partition.

For example, copy the contents of the `partition1` directory into the `Optimize/partitions/partition2` directory.
4. If any subdirectories of the newly created directory are not empty, delete all files in the subdirectories.
5. Run the SQL scripts to create and populate the Optimize system tables in the database configured for the new partition.

See [Step: Create and populate the system tables manually, if necessary](#) for more information about running the SQL scripts.
6. Repeat Steps 2 through 5 for each partition you must create. Use the most recently created directory as your starting point.

- ✧ By default, partitions are installed under the `Optimize/partitions` directory. If you modify the default directory for Optimize, or if you modify the directory that specifies partitions, then adjust these instructions accordingly.
-

To configure ACOServer for multiple partitions

When you install Optimize, a default partitions directory is created under the directory specified by `OPTIMIZE_HOME`. This default directory for partitions contains one partition, `partition1`. Whether or not you create other partitions for your Optimize configuration, you have the option to modify the default location for all partitions.

To modify the home directory for partitions, you can optionally set the `OPTIMIZE_PARTITION_HOME` environment variable in Optimize server file. This variable defines the root location for the partitions. If you set this variable, it overrides the default value.

Windows:

You can set it by adding lines such as the following two commands to `ACOServer.bat`:

```
set OPTIMIZE_PARTITION_HOME=C:\partitions
echo Using OPTIMIZE_PARTITION_HOME: %OPTIMIZE_PARTITION_HOME%
```

UNIX:

You can set it by adding the following lines to `ACOServer.sh`:

```
OPTIMIZE_PARTITION_HOME = /root_dir/work/partitions
export OPTIMIZE_PARTITION_HOME
echo "Using OPTIMIZE_PARTITION_HOME:"
$OPTIMIZE_PARTITION_HOME
```

5 Preparing to Upgrade IBM Unica Optimize

- Upgrade prerequisites for all IBM Unica Marketing products
- Order of upgrading Optimize
- Download the IBM Unica installers
- Optimize upgrade scenarios

Upgrade prerequisites for all IBM Unica Marketing products

To upgrade any IBM Unica Marketing product, you must meet all of the prerequisites listed under [Prerequisites](#) in the "Preparing to Install" chapter.

In addition, you must meet the prerequisites listed in this section.

User account requirement (UNIX only)

On UNIX, the same user account that installed the product must perform the upgrade.

32-bit to 64-bit version upgrades

If you are moving from a 32-bit to a 64-bit version of an IBM Unica Marketing product, ensure that the following conditions are met.

- The database drivers for your product data sources are also 64-bit
- All relevant library paths (for example, startup or environment scripts) correctly reference the 64-bit versions of your database drivers

Knowledge requirements

These instructions assume that the person performing the upgrade has an understanding of the following.

- The basic function of the IBM Unica installer, as described in [How the IBM Unica installers work](#)
- General IBM Unica Marketing product functionality and components, including the structure of the file system

- The installation and configuration process for the source product version and for the new version
- Maintaining configuration properties in your source and target systems
- The installation and configuration process for reports, if you are using these reports

Order of upgrading Optimize

The same considerations described in [Order of installation for Optimize](#) apply when you upgrade your current Optimize installation.

Download the IBM Unica installers

Download the following installation files.

 Place all of the files in the same directory. This is an installation requirement.

- The IBM Unica installer
- The Optimize installer

Setting permissions on UNIX-type systems

On UNIX-type systems, ensure that the installation files have full execute permissions (`rxr-xr-x`).

Choosing the right installer file

The IBM Unica Optimize installation files are named according to the version of the product and the operating system with which they are meant to be used, except for UNIX files intended to be run in console mode, which are not operating system-specific. For UNIX, different files are used depending on whether the installation mode is X-windows or console. For example:


Windows - GUI and console mode - *ProductN.N.N.N_win32.exe* is version N.N.N.N and is intended for installation on the Windows 32-bit operating system.

UNIX - X-windows mode - *ProductN.N.N.N_solaris64.bin* is version N.N.N.N and is intended for installation on the Solaris 64-bit operating system.

UNIX - console mode - *ProductN.N.N.N.sh* is version N.N.N.N and is intended for installation on all UNIX operating systems.

Optimize upgrade scenarios

Follow these guidelines for upgrading to the latest version of Optimize.

Source version	Upgrade path
Versions 7.0.x through 7.2.x	Upgrade to version 7.2.1, then follow the instructions in Upgrading from Optimize version 7.2.1 .
Version 7.2.1	Follow the instructions listed in Upgrading from Optimize version 7.2.1 .
Version 7.3.0 and later	<p>Perform an in-place upgrade installation over your current version of Optimize.</p> <p>Follow the instructions in Upgrading from Optimize versions 7.3.x and later</p> <hr/> <p> Optimize and Campaign must be at the same version level. For example, you must upgrade Campaign to version 8.5.0 before you upgrade Optimize to version 8.5.0.</p> <hr/>


6 Upgrading IBM Unica Optimize

- About upgrading Optimize
- Upgrading from Optimize version 7.2.1
- Upgrading from Optimize versions 7.3.x and later
- Configure Optimize for Chinese, Japanese, or Korean users
- Migrating rules from Optimize versions previous to version 7.3.0

About upgrading Optimize

Before you upgrade from any version of Optimize, be sure you have read and understood following information.

- Review the introductory chapter [Preparing to Upgrade Unica Marketing Products](#), which contains important information about upgrading all IBM Unica Marketing products.
- Read all the topics in this section, to understand what you must do to upgrade from your current software to the new version of Optimize.

 As part of the upgrade process, you will need to stop and restart the Optimize listener.

Upgrading from Optimize version 7.2.1

Before upgrading Optimize you should collect the following information:

Marketing Platform information

The installation wizards for each IBM Unica Marketing product must be able to communicate with the Marketing Platform system table database, to register the product.

Each time you run the installer in a new location, you must enter the following database connection information for the Marketing Platform system table database.

- Database type.
- Database host name.

- Database port.
- Database name.
- User name and password for the database account.
- JDBC connection URL to the Marketing Platform database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:

```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_d  
b_name
```

You obtained this information when you created the database or schema.

Campaign information

The installation wizard for Optimize needs to communicate with your Campaign system table database to create the Optimize tables. You must collect the following information about your installation to enable the installer to set up database tables and properly configure Optimize.

- Whether or not your Campaign database is configured for Unicode.
- Campaign database type.

If your database type is IBM DB2 and installed on a UNIX system, you also need to supply the DB2 instance path.

If your database type is Oracle, you also need to supply the Oracle home directory.

- Campaign database host name.
- Campaign database port.
- Campaign database name.
- User name and password for the Campaign database account.
- JDBC connection URL to the Campaign database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:


```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_d  
b_name
```

- The name of the machine on which the Campaign web application server is installed.
- The port on which the Campaign application server listens. If you plan to implement SSL, obtain the SSL port.
- The network domain on which your deployment machine resides. For example, `example.com`.
- The path to `CAMPAIGN_HOME`.

If you are installing Optimize and Campaign on separate machines, you must mount the `Campaign` directory for your Campaign installation as a network drive on the machine that hosts Optimize. The `svrstop` utility located in the `bin` directory must have execute permissions on the Optimize host. Define `CAMPAIGN_HOME` using the fully qualified path to your Campaign installation directory.

The new version of Optimize has new configuration properties for tuning the optimization algorithm in the `AlgorithmTuning` category. The configuration properties are added during your Campaign upgrade. You do not need to modify these properties unless you want to tune your Optimize installation for best performance. For details about tuning your installation, see the *IBM Unica Optimize User's Guide* and the *IBM Unica Optimize Troubleshooting Guide*.

1. Collect data about deprecated rules as described in [To collect deprecated rules](#).

 If you do not collect your data before migrating to the new version of Optimize, the information will be lost.

2. Stop the Optimize listener.

You should make a backup copy of your `/Optimize` directory, including `\Optimize\tools\bin\ACOOptAdmin.bat` (Windows) or `/Optimize/tools/bin/ACOOptAdmin.sh` (UNIX) in case you need to restore to your previous version.

3. Run the IBM Unica installer, selecting Optimize.

When the installer prompts you, select the **Upgrade** option.

4. Copy the appropriate settings from the `ACOOptAdmin.bat` (Windows) or `ACOOptAdmin.sh` (UNIX) file you saved in step 2 to the new version of the file in the `Optimize/tools/bin` directory.
5. Migrate the Optimize database tables as described in [To migrate optimization rules to the new version of Optimize](#).
6. Start the Optimize listener.

In the latest version of Optimize, the `ACOServer` script provides options to start and stop the Optimize listener. This script is located in the `bin` directory of your Optimize installation.

On Windows: `ACOServer.bat start`

On UNIX: `ACOServer.sh start`

7. If you had any deprecated Min/Max Total Cost rules, create new rules to replace them as described in [To migrate Min/Max Total Cost rules](#).

Upgrading from Optimize versions 7.3.x and later

You can perform an in-place upgrade from Optimize 7.3.x and later. You do not need to migrate Optimize sessions from Optimize 7.3.x and later to the new version of Optimize.

Before you upgrade Optimize, you should collect the following information:

Marketing Platform information

The installation wizards for each IBM Unica Marketing product must be able to communicate with the Marketing Platform system table database, to register the product.

Each time you run the installer in a new location, you must enter the following database connection information for the Marketing Platform system table database.

- Database type.
- Database host name.
- Database port.
- Database name.
- User name and password for the database account.
- JDBC connection URL to the Marketing Platform database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:

```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_db_name
```

You obtained this information when you created the database or schema.

Campaign information

The installation wizard for Optimize needs to communicate with your Campaign system table database to create the Optimize tables. You must collect the following information about your installation to enable the installer to set up database tables and properly configure Optimize.

- Whether or not your Campaign database is configured for Unicode.
- Campaign database type.

If your database type is IBM DB2 and installed on a UNIX system, you also need to supply the DB2 instance path.

If your database type is Oracle, you also need to supply the Oracle home directory.

- Campaign database host name.
- Campaign database port.

- Campaign database name.
- User name and password for the Campaign database account.
- JDBC connection URL to the Campaign database. The installer provides the connection URL based on the values you provide, however, you should confirm the URL is correct.

For example, for SQL Server, the JDBC connection URL takes the following format:

```
jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_db_name
```

- The name of the machine on which the Campaign web application server is installed.
- The port on which the Campaign application server listens. If you plan to implement SSL, obtain the SSL port.
- The network domain on which your deployment machine resides. For example, example.com.
- The path to `CAMPAIGN_HOME`.

If you are installing Optimize and Campaign on separate machines, you must mount the `Campaign` directory for your Campaign installation as a network drive on the machine that hosts Optimize. The `svrstop` utility located in the `bin` directory must have execute permissions on the Optimize host. Define `CAMPAIGN_HOME` using the fully qualified path to your Campaign installation directory.

The new version of Optimize has new configuration properties for tuning the optimization algorithm in the `AlgorithmTuning` category. The configuration properties are added when you upgrade Campaign. You do not need to modify these properties unless you want to tune your Optimize installation for best performance. For details about tuning your installation, see the *IBM Unica Optimize User's Guide* and the *IBM Unica Optimize Troubleshooting Guide*.

1. Stop the Optimize listener.
2. You should make a backup copy of your `/Optimize` directory in case you need to restore to a previous version.
3. Run the new IBM Unica installer, selecting Optimize and the **Upgrade** option.

When prompted, select the **Automatic database setup**.

4. If you are upgrading an installation with multiple partitions, you must upgrade the database for each partition other than `partition1` manually. The installer automatically upgrades `partition1`. According to the database you are using with Campaign, run the following script to upgrade the Optimize database tables to the new version:

```
aco_migrate7.3-8.5_dbtype.sql
```

This script adds the tables required for new features. Use the unicode version of the scripts if your database is configured for unicode.

Repeat this step for each additional partition other than `partition1`.

5. Start the Optimize listener.

In the latest version of Optimize, the `ACOServer` script provides options to start and stop the Optimize listener. This script is located in the `bin` directory of your Optimize installation.

On Windows: `ACOServer.bat start`

On UNIX: `ACOServer.sh start`

Configure Optimize for Chinese, Japanese, or Korean users

If you are going to use Optimize with a user who's user name contains Chinese, Japanese, or Korean locales, you need to configure the Optimize server.

1. Open the Optimize server file (`ACOServer`) located in the `bin` directory under your Optimize installation directory for editing.
2. Remove the comment to set the environment variable `UNICA_ACSYSENCODING` equal to `UTF-8`.

Windows: Remove `@rem` before the following line in `ACOServer.bat`:

```
@rem set UNICA_ACSYSENCODING=UTF-8
```

UNIX: Remove `#` before the following lines in `ACOServer.sh`:

```
#UNICA_ACSYSENCODING=UTF-8
#export UNICA_ACSYSENCODING
```

3. Save and close the file.
4. Restart the Optimize server in a new console window if it is running.

If you need to run an Optimize session as a user who does not have a Chinese, Japanese, or Korean character in their user name, you will need to add comments back to the `UNICA_ACSYSENCODING` settings.

Migrating rules from Optimize versions previous to version 7.3.0

Optimize 7.3.0 introduced a new algorithm for optimization. With this new algorithm, two rules are deprecated, the Min # Unique rule and the Min/Max Total Cost rule. You must run scripts on the database containing the system tables to remove any deprecated rules. These scripts work only with Optimize 7.2.1, so you must upgrade to version 7.2.1 before upgrading to Optimize 8.x.

You can recreate any Min/Max Total Cost rules with Custom Capacity rules. There is no functional equivalent of the Min # Unique rule in new versions of Optimize.

The new version of Optimize provides two scripts to assist in migrating rules:

- `aco_show_invalid_rules.sql`

This script prints a row for each deprecated rule displaying the optimization session name, the rule type, and the rule name.

- `aco_migrate7.2.1-7.3.0.sql`

This script deletes all Min # Unique and Min/Max Total Cost rules.

These scripts are available in the `/tools/migration/ddl` directory of your Optimize installation.

To collect deprecated rules

Before you begin, confirm that the required migration scripts have been installed in the `/tools/migration/ddl` directory in your Optimize installation.

1. Locate the migration script files in the `/tools/migration/ddl` directory in your Optimize installation.
2. Run the following script on your database to create a list of deprecated rules.

```
aco_show_invalid_rules.sql
```

This script creates a row for every deprecated rule. After you have completed the list, for each rule in the obsolete version of Optimize, record all pertinent information that you will need to create a new rule in the new version of Optimize.

To migrate optimization rules to the new version of Optimize

- ! The migration script works only on 7.2.1 versions of the Optimize system tables. You must upgrade to Affinium Campaign Optimize 7.2.1 before running the migration script.

Before you begin, confirm that the required migration scripts have been installed in the `/tools/migration/ddl` directory in your Optimize installation.

1. Locate the migration script files in the `/tools/migration/ddl` directory of your Optimize installation.
2. According to the database you are using with Campaign, run the following script to delete all deprecated rules:

```
aco_migrate7.2.1-7.3.0.sql
```


This script deletes all deprecated rules.

If you are upgrading an installation with multiple partitions, repeat this step for each partition.

3. According to the database you are using with Campaign, run the following script to upgrade the rules to the new version:

```
aco_migrate7.3-8.5_dbtype.sql
```

This script adds the tables required for new features. Use the unicode version of the scripts if your database is configured for unicode.

If you are upgrading an installation with multiple partitions, repeat this step for each partition.

To migrate Min/Max Total Cost rules

1. To migrate a maximum total cost rule, create a Custom Capacity rule similar to the following:

The *Sum* of the *CostPerOffer* should be \leq the value *MaximumValue* for the transaction from the offer/offer list *Offer* from channel *Channel*.

- *CostPerOffer* is the numeric column in the PCT which contains the unit cost for each offer.
- *MaximumValue* is the Maximum value from the Min/Max Total Cost rule.
- *Offer* and *Channel* are the values from the Min/Max Total Cost rule.

2. To migrate a minimum total cost rule, create a second Custom Capacity rule similar to the following:

The *Sum* of the *CostPerOffer* should be \geq the value *MinimumValue* for the transaction from the offer/offer list *Offer* from channel *Channel*.

- *CostPerOffer* is the numeric column in the PCT which contains the unit cost for each offer.
- *MaximumValue* is the Minimum value from the Min/Max Total Cost rule.
- *Offer* and *Channel* are the values from the Min/Max Total Cost rule.

A Uninstalling IBM Unica Products

- Uninstalling IBM Unica products
- Remove Optimize tables
- To uninstall IBM Unica products

Uninstalling IBM Unica products

When you install IBM Unica Marketing products, an uninstaller is included in the `Uninstall_Product` directory, where *Product* is the name of your IBM Unica product. On Windows, an entry is also added to the **Add or Remove Programs** list in the Control Panel.

You may need to uninstall an IBM Unica product if you are doing the following.

- Retiring a machine.
- Removing an IBM Unica product from your machine.
- Freeing up space on a machine.

Running the IBM Unica uninstaller ensures that all configuration files, installer registry information, and user data are removed from the system. If you manually remove the files in your installation directory instead of running the uninstaller, the result may be an incomplete installation if you later reinstall an IBM Unica product in the same location.

Remove Optimize tables

Before you uninstall Optimize, you may want to remove the Optimize tables from your Campaign database.

To remove the Optimize tables, run the `aco_systab_drop.sql` script in the `ddl` directory under your Optimize installation.

To uninstall IBM Unica products

💡 On UNIX, the same user account that installed IBM Unica Marketing must run the uninstaller.

1. Undeploy the IBM Unica Marketing product web application from WebSphere or WebLogic.
2. Shut down WebSphere or WebLogic.
3. Run the IBM Unica Marketing uninstaller and follow the directions in the wizard.

The uninstaller is located in the `Uninstall_Product` directory, where *Product* is the name of your IBM Unica Marketing product.

When you uninstall a product that was installed using unattended mode, the uninstall is performed in unattended mode (without presenting any dialogs for user interaction).