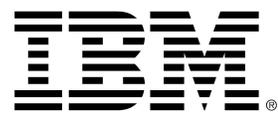


IBM Unica PredictiveInsight  
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## *Installation Guide*



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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. If the `version.txt` file is not available, use the command `NetTracker admin - buildinfo` to obtain the version information.

## 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 PredictiveInsight

- [About the PredictiveInsight installation process](#)
- [Upgrading to the latest version of PredictiveInsight](#)
- [Prerequisites for installing PredictiveInsight](#)
- [Download the IBM Unica Marketing software and installer](#)
- [Obtain required information](#)

## About the PredictiveInsight installation process

Installing IBM Unica Marketing products is a multi-step process that involves working with software and hardware elements that are not IBM Unica Marketing applications. Product documentation from IBM provides specific guidance for installing and configuring IBM products with various external products. However, for additional details about how to work with products outside of IBM Unica Marketing, consult the documentation these products provide.

IBM Unica PredictiveInsight provides user authentication and authorization through IBM Unica Marketing Platform. You must install Marketing Platform files and deploy Marketing Platform and PredictiveInsight on a web application server (WebLogic or WebSphere). You can install PredictiveInsight on Windows or UNIX operating systems.

### **Before you begin**

Before starting to install or upgrade PredictiveInsight, you must

- Install and configure IBM Unica Marketing Platform
- Satisfy all prerequisites

For information about how to install Marketing Platform, see the *IBM Unica Marketing Platform Installation Guide*.

For details about PredictiveInsight installation prerequisites, see [Prerequisites for installing PredictiveInsight](#).

## Installing and Configuring PredictiveInsight

This section provides a general overview of the PredictiveInsight installation, deployment, and configuration process. See individual sections of this guide for additional detail.

1. Download and install the PredictiveInsight software.  
See [Download the IBM Unica Marketing software and installer](#).
2. Run the IBM Unica installer.  
See [Run the IBM Unica Marketing installer](#).
3. Configure PredictiveInsight before you deploy on the web application server.  
See [Configuring PredictiveInsight Before Deployment](#).
4. Deploy PredictiveInsight on a web application server.  
See [Deploying PredictiveInsight](#).
5. Configure PredictiveInsight after you deploy on the web application server.  
See [Configuring PredictiveInsight After Deployment](#).

## Upgrading to the latest version of PredictiveInsight

For information on how to upgrade to the latest version of PredictiveInsight, see [Upgrading PredictiveInsight](#).

## Prerequisites for installing PredictiveInsight

Before you start the installation process, review and satisfy the following prerequisites for installing PredictiveInsight.

- [System requirements](#)
- [Knowledge requirement](#)
- [Client machines](#)
- [Access permissions](#)

### 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.

## Client machines

Client machines should meet the following configuration recommendations:

- The browser should not cache pages. In your browser settings, 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, PredictiveInsight might not function properly. We recommend disabling pop-up blocker software while running PredictiveInsight.

## 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 PredictiveInsight and the Marketing Platform must be a member of the same group as PredictiveInsight users. This user account must have a valid home directory, and have write permissions for that directory.

## Download the IBM Unica Marketing software and installer

Obtain the DVD, or download the software from IBM.

---

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

---

You should have the following installation files.

- The IBM Unica installer.
- The PredictiveInsight 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 Marketing product 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.

### Before you run the installer

Before you run the installer, do the following.

- [Obtain information about your installation that the installer will require.](#)
- [Determine where you will install PredictiveInsight components.](#)

## Obtain required information

The installer prompts you to enter some information about your Marketing Platform system table database and web application server. Gather this information before you start the installation.

### Obtain connection information for the Marketing Platform database

The PredictiveInsight installation wizard must be able to communicate with the Marketing Platform system table database, to register their menu items, security information, and configuration properties. 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 or schema ID.
- User name and password for the database account.

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

The master installer tests and validates this connection information when you perform the installation.

### Obtain information about the PredictiveInsight deployment on the web application server

Obtain the following information about your planned PredictiveInsight deployment.

- Protocol: HTTP or HTTPS if SSL is implemented in the web application server.
- Host: The name of the machine on which the Marketing Platform will be deployed.
- Port: The port on which the web application server listens.
- Domain name: The company domain of each machine where IBM Unica Marketing products are installed. For example, `mycompany.com`. All IBM Unica Marketing products must be installed in the same company domain, and you must enter the domain name in all lower-case letters.

If there is a mis-match in domain name entries, you may encounter problems when you attempt to use IBM Unica Marketing Operations features or navigate among products. You can change the domain name after the products are deployed by logging in and changing values of the relevant configuration properties in the product navigation categories on the **Settings > Configuration** page.

# 2 Installing PredictiveInsight

- [About installing PredictiveInsight](#)
- [Where to install PredictiveInsight components](#)
- [Run the IBM Unica installer](#)
- [How the IBM Unica Marketing installers work](#)

## About installing PredictiveInsight

This section contains information required for installing IBM Unica PredictiveInsight. Installing PredictiveInsight requires running the IBM Unica Marketing installer. For more information about the installer, see [How the IBM Unica Marketing Installer Works](#).

To complete the required installation tasks, you must be familiar with deploying applications on a web application server and with IBM Unica Marketing Platform.

Before you begin the installation, ensure that IBM Unica Marketing Platform is installed. For more information about working with Marketing Platform and deploying IBM Unica Marketing applications, including PredictiveInsight, on web application servers, see the *IBM Unica Marketing Platform Installation Guide* and the *IBM Unica Marketing Platform Administration Guide*.

## Where to install PredictiveInsight components

The following table describes the components you can select when you install PredictiveInsight. You can install these components on the same machine or on different machines.

Component	Description
PredictiveInsight server	Includes files for generating modeling solutions and scoring. It also includes the PredictiveInsight startup scripts that allow you to run multiple PredictiveInsight servers, if necessary.
J2EE Application	The web application that provides the PredictiveInsight user interface.

Component	Description
Demo Data	Provides sample data sets used in examples in PredictiveInsight.

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

 If you plan to deploy Marketing Platform and PredictiveInsight on WebLogic 9.2, do not include them in an EAR file. For more information about deploying with EAR files, see the *IBM Unica Marketing Platform Installation Guide*.

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 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](#).

- Pay close attention to the installation summary windows. If errors are reported, check the installer log files, and contact IBM Unica technical support if necessary.

## 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.

## Marketing Platform Database Connection information for PredictiveInsight

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 database connection information for the Marketing Platform database. In subsequent runs in the same location, the installer uses the values you entered during the first run as the defaults.

Field	Description
Database Host Name	The name of the machine that hosts the Marketing Platform system table database or schema.
Database Port	The port number of the Marketing Platform system table database or schema.
Database Name/System ID (SID)	The name of the Marketing Platform system table database or schema.
Database User Name	User login name for an account in the Marketing Platform system table database or schema. This account must have SELECT, INSERT, UPDATE, and DELETE rights.
Database Password	Password for the same account in the Marketing Platform system table database or schema used in the <b>Database User Name</b> field.

## Summary and results pages

During the installation process, the wizards display several summary and results pages, as follows.

- Pre-installation summary - Displays the product being installed, installation folder, product components, disk space required, and the folder in which the temporary Java runtime environment required by the installer is installed. You can review this information and go back to make changes, or proceed with the install.
- Registration results - Reports success or failure for registering the product with the Marketing Platform. If registration fails, you must register the product manually as described in [Register the product manually, if necessary](#).
- Install complete summary - Lists the products that were installed and the installation directory.

### Step: Register the product manually, if necessary

If the product's 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 product 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.

## PredictiveInsight server settings reference

The installer prompts you to specify the following settings for the PredictiveInsight server:

Field	Description
Server Hostname	Name of the server where PredictiveInsight server will be installed.
Server Listener Port	Port used by the PredictiveInsight server to communicate with the listener. The default port number is 1996.
Secure connection	Specifies whether the PredictiveInsight listener will communicate using SSL. For details on configuring PredictiveInsight to use SSL, see the <i>Marketing Platform Administrator's Guide</i> .
Database Client Availability	The client database (if any) that will communicate with the PredictiveInsight server.

## Connection Settings reference

This section describes the Connection Settings window in the installation wizard. This window appears when you install any IBM Unica Marketing web component. It prompts you to enter information about your planned deployment.

Field	Valid values
HTTP or HTTPS radio buttons or Secure connection checkbox	Protocol used by the server in which the EAR file is deployed. Select HTTPS or the Secure connection checkbox if SSL is implemented in the web application server.
Host	The name of the machine on which the product is deployed.
Port	The port on which the web application server is listening.
Domain name	The company domain of each machine where IBM Unica Marketing products are installed. All products should be installed in the same company domain.

## 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.

### Navigating in the installation wizards

When the installer runs in GUI mode, you navigate using the **Next**, **Previous**, **Cancel**, and **Done** buttons.

When the installer runs in console mode, you navigate by entering numbers that correspond to the buttons in GUI mode, as described in the help text on each screen of the wizard. In console mode, an additional redisplay command is available.

In console mode, a number or letter is displayed in square brackets at the end of the prompt line; this is the default command issued if you press **Enter** without typing anything. You can type **back** to go to a previous screen, or `quit` to cancel the installation.

### 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).

## 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.

# 3 Configuring PredictiveInsight Before Deployment

- About pre-deployment configuration for PredictiveInsight
- Register IBM Unica PredictiveInsight manually, if necessary
- Set database and library environment variables in the startup script (UNIX only)

## About pre-deployment configuration for PredictiveInsight

You must perform the tasks described in this section before you deploy the PredictiveInsight web application.

- [Register PredictiveInsight manually, if necessary](#)
- [Set database and library environment variables \(UNIX only\)](#)

---

✦ The IBM Unica Marketing installer can create one or more EAR files containing the installed products that you specify. You then deploy the EAR file or files that include the products. For more information about creating and deploying applications in an EAR file, see the *IBM Unica Marketing Platform Installation Guide*.

---

## Register IBM Unica PredictiveInsight manually, if necessary

If the PredictiveInsight 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 product information into the Marketing Platform system tables manually, as described in this procedure.

The `configTool` utility mentioned in this procedure is located in the `tools/bin` directory under your Marketing Platform installation.

For detailed instructions on using the `configTool` utility, see [The configTool utility](#).

1. Run the `configTool` utility, using the following example commands as guidelines.

This imports configuration properties and menu items. Note that you run the utility as many times as there are files.

```
configTool.bat -r Model -f
"full_path_to_PredictiveInsight_installation_directory\conf\model_configuration.xml"
```

```
configTool.bat -i -p
"Affinium|suite|uiNavigation|mainMenu|Analytics" -f
"full_path_to_PredictiveInsight_installation_directory\conf\model_navigation.xml"
```

## Set database and library environment variables in the startup script (UNIX only)

If you plan to use data from a database with your PredictiveInsight installation, you must set the database and library environment variables in the `setenv.sh` file.

### Database and library environment variables

The following database and library environment variables are required in the `setenv.sh` file for UNIX installations of PredictiveInsight that use databases for data.

#### Database environment variables

Database	Syntax and Description
DB2	<pre>DB2DIR=&lt;full_dir_path&gt; export DB2DIR</pre> <p>Directory location where DB2 is installed (for example, <code>/usr/lpp/db2_06_01</code>).</p> <pre>. &lt;full path to db2profile&gt;</pre> <p>This command sources the database configuration for DB2 users (for example, <code>/home/db2inst1/sqllib/db2profile</code>).</p> <p>To source the database configuration, the full path to <code>db2profile</code> must be preceded by a “ . ” (period and then a space).</p>

Database	Syntax and Description
Oracle	<pre>ORACLE_BASE=&lt;full_dir_path&gt; export ORACLE_BASE</pre> <p>Directory location where Oracle is installed (for example, /home/oracle ).</p> <pre>ORACLE_HOME=&lt;full_dir_path&gt; export ORACLE_HOME</pre> <p>Directory location of Oracle's home directory (for example, /home/oracle/OraHome1 ).</p>
ODBC	<pre>&lt;database_name&gt;=&lt;full_dir_path&gt; export &lt;database_name&gt;</pre> <p>Directory location where database is installed (for example, /home/&lt;database_name&gt; ).</p> <pre>ODBC=&lt;full_dir_path&gt; export ODBC</pre> <p>Directory location where the ODBC driver is installed (for example, /home/&lt;database_name&gt;/drivers ).</p> <pre>ODBCINI=&lt;full path to ini file&gt; export ODBCINI</pre> <p>File location where the odbc.ini file exists (for example, /home/&lt;database_name&gt;/etc/odbc.ini ).</p>

## Library environment variable

Operating System	Value
SunOS	<pre>LD_LIBRARY_PATH</pre> <p>If <code>LD_LIBRARY_PATH_64</code> (for 64-bit linking) is set, remove it. The <code>LD_LIBRARY_PATH</code> variable will be ignored if <code>LD_LIBRARY_PATH_64</code> is set.</p>
AIX	<pre>LIBPATH</pre>

For example: `SHLIB_PATH = "/usr/lib: $ORACLE_HOME/lib"`

Based on your operating system and Oracle database version, you may have `lib32` , `lib` , and/or `lib64` in your Oracle directory. Be sure to place your `lib32` directory first in your `LIBPATH` . For example:

```
LIBPATH=/usr/lib:$ORACLE_HOME/lib32:$ORACLE_HOME/lib
```

# 4 Deploying PredictiveInsight

- Deploying PredictiveInsight
- WebSphere guidelines
- WebLogic guidelines
- Start the PredictiveInsight server

## Deploying PredictiveInsight

To deploy PredictiveInsight, follow the guidelines in this section and then start the PredictiveInsight server.

When you ran the IBM Unica installer, you may have included PredictiveInsight in an EAR file, or you may choose to deploy the PredictiveInsight WAR file. If you included Marketing Platform or other products in an EAR file, you must follow all the deployment guidelines detailed in the individual install guides for the products included in the EAR file.

We assume that you know how to work with your web application server. Consult your web application server documentation for details such as navigation in the Administration console.

For additional information about deploying IBM Unica Marketing products on web application servers, see the *IBM Unica Marketing Platform Installation Guide*.

## WebSphere guidelines

Follow the guidelines in this section when deploying PredictiveInsight on WebSphere.

- 
- ! If you plan to use the IBM WebSphere Application Server V7.0 to deploy any products, [you must apply Fix Pack 15](#) (also referred to as Version 7.0.0.15) or higher to address a security issue.
- 

### All versions of WebSphere

Follow the guidelines in this section for all supported versions of WebSphere.

- Deploy PredictiveInsight as an enterprise application.

- In the server's **Web Container Settings > Session Management** section, enable cookies.
- In the server's **Applications > Enterprise Applications** section, select the PredictiveInsight file that you deployed, then select **Class loading and update detection** and set the following General Properties.
  - **Class loader order** - Classes loaded with application class loader first
  - **WAR class loader policy** - Single class loader for application
- If you are deploying multiple Unica applications in the same WebSphere profile, specify a different session cookie name for each deployed application, as follows:
  - In the server's **Applications > Enterprise Applications > [deployed\_application] > Session Management > Enable Cookies > Cookie Name section**, specify the session cookie name.
  - Select the **Override session management** checkbox.
- To configure non-ASCII data settings, set Generic JVM settings as follows.
 

```
-Dclient.encoding.override=UTF-8
```
- To allow PredictiveInsight to operate with SSL, you must configure the keystore using `unicaClientIdentity.jks` in the NodeDefaultSettings for SSL configuration in the security section for WebSphere. The `unicaClientIdentity.jks` file is available in the `PredictiveInsight/security` directory.

## WebSphere version 6.1 and 7.0

If you are deploying PredictiveInsight on WebSphere 6.1 or 7.0, follow all of the guidelines in the previous section in addition to the guidelines in this section.

- Ensure that your version is WebSphere 6.1.0.21 or higher.
- Ensure that the JDK source level of the JSP compiler is set to Java 15, as follows.
  - In the form where you browse to and select the WAR file, select **Show me all installation options and parameters** so the **Select Installation Options** wizard runs.
  - In step 1 of the **Select Installation Options** wizard, select **Precompile JavaServer Pages files**.
  - In step 3 of the **Select Installation Options** wizard, ensure that the **JDK Source Level** is set to 15.
  - Set the context root to `/Model`.
- Set a custom property as follows.
  - Name: `com.ibm.ws.webcontainer.invokefilterscompatibility`
  - Value: `true`

Go to <http://www-01.ibm.com/support/docview.wss?rss180&uid=swg21284395> for instructions on setting a custom property in WebSphere.

- On UNIX only, on the server's **Java and Process Management > Process Definition > Java Virtual Machine > Generic JVM arguments** section, set the following.

```
-Djava.awt.headless=true
```

Restart WebSphere after changing this setting.

## IBM WebSphere Application Server V7.0 requires fixpack 7.0.0.17 or higher

If you plan to use the IBM WebSphere Application Server V7.0 to deploy any IBM Unica Marketing products, you must apply Fix Pack 17 (also referred to as Version 7.0.0.17) or higher to address a security issue. This applies to all WebSphere Application Server 7.0 packages, including the version that is bundled with some IBM Unica Marketing products.

You can obtain Fix Pack 17 or higher here:

<http://www-01.ibm.com/support/docview.wss?rs=180&uid=swg27013594>.

Note that on that page, you must select the correct Fix Pack before you download.

For additional information about supported WebSphere versions for deploying IBM Unica Marketing products, see the *Recommended Software Environments and Minimum System Requirements* document for each product.

## WebLogic guidelines

Follow the guidelines in this section when deploying PredictiveInsight on WebLogic.

### All versions of WebLogic

- IBM Unica Marketing products customize the JVM used by WebLogic. You may need to create a WebLogic instance dedicated to IBM Unica Marketing products if you encounter JVM-related errors.
- Verify that the SDK selected for the WebLogic domain you are using is the Sun SDK by looking in the startup script (`startWebLogic.cmd`) for the `JAVA_VENDOR` variable. It should be set to: `JAVA_VENDOR=Sun`. If it is set to `JAVA_VENDOR=BEA`, JRockit has been selected. JRockit is not supported. To change the selected SDK, refer to the WebLogic documentation.
- Deploy the IBM Unica Marketing products file as web application modules.

- On UNIX systems, you must start WebLogic from the console to allow correct rendering of graphical charts. The console is usually the machine on which the server is running. In some cases, however, the web application server is set up differently.

If a console is not accessible or does not exist, you can emulate a console using Exceed. You must configure Exceed so that your local Xserver process connects to the UNIX machine in root window or single window mode. If you start the web application server using Exceed, you must keep Exceed running in the background to allow the web application server to continue running. Please contact IBM Technical Support for detailed instructions if you encounter problems with chart rendering.

Connecting to the UNIX machine via telnet or SSH always causes problems rendering charts.

- If you are configuring WebLogic to use the IIS plug-in, review the WebLogic documentation.
- On UNIX only, add the following jvm option in the `startWebLogic` script:

```
-Djava.awt.headless=true
```

Restart WebLogic after making this change.

- To allow PredictiveInsight to operate with SSL, you must configure the keystore using `unicaClientIdentity.jks` in `JAVA_OPTIONS` for `setDomainEnv.sh/setDomainEnv.cmd`. The `unicaClientIdentity.jks` file is available in the `PredictiveInsight/security` directory.

## Additional steps for WebLogic 11g

! Complete the following steps ONLY if you also use AIX 6.1 with WebLogic11g.

Make the following changes to the `model.war` file as follows:

1. Unwar the `model.war` file, and locate the `weblogic.xml` file in the `WEB_INF` directory.
2. Remove the `xercesImpl.jar` file from the unpackaged `WEB_INF/lib` directory.
3. Build `model.war` to include the changes before you deploy on WebLogic.

## Start the PredictiveInsight server

You can start the PredictiveInsight server directly, or install it as a service.

- ⚡ The Marketing Platform and PredictiveInsight web applications must be deployed and running when you start the PredictiveInsight server.

## To start the Unica PredictiveInsight server directly

Follow the instructions appropriate for your operating system.

### Windows

Run the `Modelsvr.bat` file located in the PredictiveInsight `bin` directory. When the `unica_amlshr.exe` process appears on the Windows Task Manager Processes tab, the server has started successfully.

### UNIX

Run the `Modelsvr.sh` file located in the PredictiveInsight `bin` directory. To determine whether the `unica_amlshr` process has started successfully, enter this command:

```
ps -ef | grep unica_amlshr
```

## To install the PredictiveInsight server as a Windows service

1. Add the `bin` directory under your PredictiveInsight installation to the User Path environment variable. If the Windows User Path environment variable does not exist, create it.

Make sure you add this to the User Path variable, not the System Path variable.

If the PredictiveInsight `bin` directory exists in the System Path environment variable, remove it. You do not need this in the System Path environment variable to install the PredictiveInsight server as a service.

2. Set Windows environment variables as shown in the following table.

Environment variable name	Value
<code>MODEL_HOME</code>	The full path of the directory in which PredictiveInsight is installed. For example: <code>C:\Unica\PredictiveInsight</code>
<code>UNICA_MODELLOGDIR</code>	<code>%MODEL_HOME%\logs</code>
<code>UNICA_AMTMPDIR</code>	<code>%MODEL_HOME%\temp</code>
<code>UNICA_AMSESDIR</code>	<code>%MODEL_HOME%\home\sessions</code>
<code>UNICA_AMCFGDIR</code>	<code>%MODEL_HOME%\conf</code>
<code>UNICA_AMDATDIR</code>	<code>%MODEL_HOME%\home\data</code>

---

Environment variable name	Value
UNICA_AMHOMEDIR	%MODEL_HOME%\home

---

3. If you are upgrading from a version of Affinium Model that had the server installed as a service, stop the service.
4. Open a command window and change directories to the `bin` directory under your PredictiveInsight installation.
5. Run the following command to create the PredictiveInsight server service:

```
unica_amlshr -i
```

The `unica_amlshr` service is listed as a running service.

# 5 Configuring PredictiveInsight After Deployment

- About post-deployment configuration
- Set up a PredictiveInsight user account
- Verify your PredictiveInsight installation

## About post-deployment configuration

You must perform the tasks described in this section after you deploy Marketing Platform and PredictiveInsight.

- [Set up a PredictiveInsight user account](#)
- [Verify that the installation is running and accessible](#)

## Set up a PredictiveInsight user account

In IBM Unica Marketing Platform, create a user account to access PredictiveInsight.

You must assign the user to the **ModelUserRole**. You can assign this role directly to the user or assign the user to a group that has this role.

For general instructions on setting up a new user, see [Setting up Unica Marketing system users](#).

## Verify your PredictiveInsight installation

1. Verify that the PredictiveInsight server is running.

In Windows, look for `unica_amlshr.exe` on the Processes tab of the Task Manager.

In UNIX, use this command:

```
ps -ef | grep unica_amlshr
```

2. Log in to the PredictiveInsight web application.

Log in with a user account that has been assigned the **ModelUserRole**.

The URL for accessing the PredictiveInsight web application depends on the context root defined when you deployed the application to the web application server. It is generally:

`http://hostname:port/unica`

3. Import data and generate models.

# 6 Upgrading PredictiveInsight

- [About upgrading your current installation](#)
- [PredictiveInsight upgrade paths available](#)
- [Order of upgrading](#)
- [Moving from PredictiveInsight Standard Edition to IBM Unica PredictiveInsight Enterprise Edition](#)
- [Upgrading PredictiveInsight](#)

## About upgrading your current installation

Before you upgrade, be sure that you have satisfied all upgrade [prerequisites](#) and that you understand what is required to upgrade your current Affinium Model or PredictiveInsight installation to the latest version of PredictiveInsight.

If you have installed the **Enterprise edition** of Affinium Model or PredictiveInsight you can [upgrade to the latest version of IBM Unica PredictiveInsight](#) . Review the list of supported [upgrade paths](#) to confirm that you can upgrade your current installation.

### **PredictiveInsight Standard Edition is not available for version 8.5.0**

With the release of IBM Unica PredictiveInsight version 8.5.0, the Standard Edition of PredictiveInsight is no longer available.

To upgrade from the Standard Edition to the latest version of PredictiveInsight, you must perform a fresh installation of IBM Unica PredictiveInsight Enterprise Edition. Installing the latest version of PredictiveInsight requires deployment on a web application server (IBM WebSphere or Oracle Weblogic) and installing IBM Unica Marketing Platform.

More more information about how to upgrade from the Standard Edition to the Enterprise Edition, see [Moving from PredictiveInsight Standard Edition to IBM Unica PredictiveInsight Enterprise Edition](#).

## About environment and server configuration files during upgrade

When you upgrade to the latest version of PredictiveInsight, the IBM installer upgrades the existing `setenv.bat` or `setenv.sh` and the `model_server.conf` files. For some upgrade paths, you might need to manually edit some of the upgraded files.

### When upgrading from PredictiveInsight 7.x to the latest version of PredictiveInsight

The Unica installer performs an in-place upgrade of the existing `model_server.conf` file in the `conf` directory of your PredictiveInsight installation. If your installation does not contain a `setenv` file, the installer creates a new `setenv` file in the `bin` directory.

If you have made custom configurations or non-default settings, you must make a backup copy of the current files to preserve your settings before starting the upgrade. After running the installer, edit the new files using settings preserved in the backup copy. Do not simply replace the new files with the backup copies. You must recreate your original settings by manually configuring the new files.

### When upgrading from PredictiveInsight 8.x to the latest version of PredictiveInsight

The Unica installer performs an in-place upgrade of the `setenv` file in the `bin` directory and the `model_server.conf` file in the `conf` directory.

You do not need to modify the upgraded files when the installer finishes. The installer preserves your custom configurations and non-default settings.

## PredictiveInsight upgrade paths available

You can upgrade your current Affinium Model or PredictiveInsight installation to the latest PredictiveInsight version as follows.

- Affinium Model **7.0.x** to the latest version of PredictiveInsight
- Affinium Model **7.3.x** to the latest version of PredictiveInsight
- PredictiveInsight **8.x** to the latest version of PredictiveInsight

If you are upgrading from Affinium Model 5.5 or 6.x, or if you are moving from PredictiveInsight Standard Edition, you must perform a fresh installation of PredictiveInsight and copy your existing session files to the top level `Home\sessions` directory.

You can migrate your content and modeling sessions from Affinium Model 5.5 and 6.4 to PredictiveInsight 8.1.0 or later. You cannot migrate content or sessions from Affinium Model installations prior to version 5.5.

## Order of upgrading

Upgrade IBM Unica Marketing Platform before you upgrade PredictiveInsight. For more information about upgrading Marketing Platform, see the *IBM Unica Marketing Platform Installation Guide*.

## Moving from PredictiveInsight Standard Edition to IBM Unica PredictiveInsight Enterprise Edition

Before you begin, consider the changes that you will need to make in your computer network. For a description of the requirements, see [Preparing to install PredictiveInsight](#).

Moving your current standalone installation of PredictiveInsight Standard Edition to an instance of IBM Unica PredictiveInsight on your network requires installing and deploying IBM Unica Marketing, including at least IBM Unica Marketing Platform and PredictiveInsight on a web server. If you have already installed IBM Unica Marketing separately, you must upgrade IBM Unica Marketing Platform before you install IBM Unica PredictiveInsight. You can use the IBM Unica installer to perform the Marketing Platform upgrade as part of the IBM Unica PredictiveInsight installation.

Complete the following steps to move from PredictiveInsight Standard Edition to an instance of IBM Unica PredictiveInsight that is deployed on your network.

1. Back up the PredictiveInsight Standard Edition installation.

Back up the following files.

- `/$MODEL_HOME/home/sessions`
- `/$MODEL_HOME/home/data`
- `/$MODEL_HOME/conf/model_server.conf`
- `/$MODEL_HOME/bin/setenv.bat`

For additional information about backing up the installation, see [Back up the current installation](#).

2. Install the latest version of IBM Unica PredictiveInsight.

For a list of required preparations and procedures, see [Installing PredictiveInsight](#).

3. In the directory where you installed IBM Unica PredictiveInsight, restore the session and data files, as follows.
  - Session files, including underscore files, to `/$MODEL_HOME/home/sessions`
  - Data files to `/$MODEL_HOME/home/data`
4. Update configuration changes in `/$MODEL_HOME/conf/model_server.conf`
5. Update environment changes in `/$MODEL_HOME/bin/setenv.bat`

After you have installed the PredictiveInsight files and restored session and data files, you must deploy and run IBM Unica PredictiveInsight on a web application server in your environment.

Prepare, deploy, and configure IBM Unica PredictiveInsight using the procedures described in other sections of this guide.

## Upgrading PredictiveInsight

Upgrading to the latest version of IBM Unica PredictiveInsight installation requires that you understand the upgrade order and upgrade prerequisites. You must also have the appropriate permissions to perform the backup and deployment tasks required.

Upgrading to the current version of PredictiveInsight proceeds as follows.

1. [Back up the current Affinium Model or PredictiveInsight installation.](#)
2. [Undeploy the current version of Affinium Model or PredictiveInsight.](#)
3. [Install the new version of PredictiveInsight as an upgrade.](#)
4. [Deploy the new version of the IBM Unica PredictiveInsight software.](#)

These steps are described in the following sections. Before you begin, review the [Upgrade prerequisites for IBM Unica PredictiveInsight](#) .

## Upgrade prerequisites for IBM Unica PredictiveInsight

Your existing version of Affinium Model or PredictiveInsight and the new version of PredictiveInsight installation must be:

- Installed on the same type of operating system
- Deployed on the same type of web application server

## Back up the current installation

Back up all files used by your installation of Affinium Model or PredictiveInsight, including data, sessions, queries, and models. This is highly recommended because it allows you to restore to a known working state in case of issues during the upgrade process.

The default location for data files is `/Affinium/Model/home/data`. Sessions are stored in `/Affinium/Model/home/sessions`. When backing up sessions, be sure to include the temporary files (named `*_001`, `*_002`, and so on). Queries files have the `.qry` extension, and model files have the `.rtm` extension.

### IBM Unica PredictiveInsight Standard Edition

If your current installation is PredictiveInsight Standard Edition, see [Moving from PredictiveInsight Standard Edition to IBM Unica PredictiveInsight](#).

## Undeploy the current version

You must undeploy the current version of Affinium Model or PredictiveInsight so that the web application server releases the lock on the war file from your current installation. This allows the PredictiveInsight upgrade to register the new version in Marketing Platform.

1. Undeploy the current version of Affinium Model or PredictiveInsight on the web application server.
2. Ensure that the `unica_amlshr` and `unica_modelsvr` processes are not running.
3. Ensure that none of the files from the current installation (for example, `model_server.conf`, `setenv.bat/.sh`) are open.
4. Shut down and restart the web application server after undeploying to ensure that the lock on the war file is released.

## Unload unused files from memory (AIX only)

For installations on AIX, run the `slibclean` command included with your AIX installation to unload unused libraries from memory before you run the installer in upgrade mode. Note that you must be root to run the `slibclean` command for this purpose.

## Install IBM Unica PredictiveInsight in upgrade mode

Follow the detailed installation steps in the section, [Installing PredictiveInsight](#), to install PredictiveInsight in upgrade mode.

When prompted for an installation location, select the same location as your current installation. The installer detects that you have an earlier version of Affinium Model or PredictiveInsight installed and it runs in upgrade mode to upgrade the current installation to the new version of IBM Unica PredictiveInsight.

## Define the PredictiveInsight listener port

After you have run the installer, you must update `setenv` to specify the port used by the PredictiveInsight listener.

For Windows, add the following parameter to `setenv.bat`.

```
set UNICA_AMPOR= <listener_port>
```

For UNIX, add the following parameter to `setenv.sh`.

```
UNICA_AMPOR= <listener_port>
```

```
export UNICA_AMPORT
```

## Deploy IBM Unica PredictiveInsight

Deploy the newly installed version of IBM Unica PredictiveInsight in your web application server. For more information, see [Deploying PredictiveInsight](#) .

Be certain to start the PredictiveInsight listener.

# A Uninstalling IBM Unica products

- Uninstalling IBM Unica products
- To uninstall IBM Unica products
- Uninstalling Unica PredictiveInsight Standard Edition

## 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.

## 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. Stop any running processes that are related to the product you are uninstalling, such as stopping the Campaign or Optimize Listener services prior to uninstalling those products.
4. 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).

## Uninstalling Unica PredictiveInsight Standard Edition

To uninstall PredictiveInsight Standard Edition, click on the `Uninstall_PredictiveInsight_Standard.exe` file in the `Uninstall_PredictiveInsight_Standard` directory.

# B IBM Unica PredictiveInsight configuration properties

- IBM Unica PredictiveInsightconfiguration properties
- navigation category

## IBM Unica PredictiveInsightconfiguration properties

This section describes the PredictiveInsight configuration properties on the Configuration page.

### PredictiveInsight > navigation

#### welcomePageURI

Not currently used.

#### Default Value

Undefined

#### seedName

The `seedName` property is used internally by IBM applications. You should not change this value.

#### Default Value

Undefined

#### type

Not currently used.

**Default Value**

Undefined

**httpPort**

Not currently used.

**Default Value**

7001

**httpsPort**

Not currently used.

**Default Value**

7001

**serverURL**

Specifies the URL used by PredictiveInsight. This is set at installation time and normally should not be changed. If you deploy PredictiveInsight in a web application domain other than the one specified during installation, you will need to change this value. Note that the URL contains the domain name, as shown in the following example:

```
protocol://machine_name_or_IP_address.domain_name:port_number/Model
```

**Default Value**

Undefined

**displayName**

Not currently used.

**Default Value**

PredictiveInsight

# C Managing Configurations in the IBM Unica Marketing Platform

- About configuration management
- About property categories
- About property descriptions
- About refreshing the display
- About the default user locale preference
- Editing property values
- Duplicating and deleting categories

## About configuration management

When IBM Unica Marketing is first installed, the Configuration page displays only the properties used to configure the IBM Unica Marketing Platform and some global configuration properties. When you install additional IBM Unica Marketing applications, the properties used to configure these applications are registered with the Marketing Platform. These properties are then displayed on the Configuration page, where you can set or modify their values.

Note that some applications may have additional configuration properties that are not stored in the central repository. See application documentation for complete information on all configuration options for the application.

## About property categories

The **Reports**, **General** and **Platform** categories are present when the Marketing Platform is first installed. These categories contain the following properties that apply across all IBM Unica Marketing applications installed in a suite.

- The default locale setting

- The **Security** category and sub-categories with properties that specify login modes and mode-specific settings.
- Password settings
- Properties that are used to configure data filters
- Properties used to configure schedules
- Properties used to configure the reporting feature

Depending on the IBM Unica Marketing applications that are installed, additional categories contain application-specific categories and sub-categories. For example, after Campaign is installed, the **Campaign** category contains Campaign-related properties and sub-categories.

## Identifying category types

A category can be one of three types, which are identified by different icons as follows.

Category type	Icon
Categories that contain no configurable properties	
Categories that contain configurable properties	
Template categories that you can use to create a new category	

## Duplicating categories using templates

A IBM Unica Marketing application's properties are registered with the Marketing Platform when the application is installed. When an application's configuration requires that a category can be duplicated, a category template is provided. To create a new category, you duplicate the template. For example, you can create a new Campaign partition or data source by duplicating the appropriate template. You can also delete any category that was created from a template.

## Identifying category templates

The Configuration page displays category templates in the navigation tree. You can identify a category template in the tree because its label is in italics and enclosed in parentheses.

## Naming a new category

The following restrictions apply when you name a new category.

- The name must be unique among categories that are siblings in the tree (that is, among categories that share the same parent category).

- The following characters are not allowed in category names.

!	^
"	<
~	>
#	=
\$	?
&	@
&	[
(	]
)	{
*	}
+	\
:	/
;	
,	`
	~

Also, the name may not start with a period.

## Deleting categories created from templates

By default, any category created from a template can be deleted.

## Deleting categories

On the Configuration page, some categories can be deleted and others cannot. Any category you create from a template can be deleted. In addition, when an IBM Unica Marketing product is registered, its set of categories may include categories that can be deleted.

Categories that can be deleted in the Configuration page display a **Delete Category** link on the Settings page that appears when you select the category in the navigation tree.

## About property descriptions

You can access property descriptions in either of the following ways.

- Click **Help > Help for this page** to launch online help. Click a product and then a configuration category in the pages that follow to navigate to the topic that describes all of the properties in a category.
- Click **Help > Product Documentation** to launch a page that gives you access to all of the product documentation in PDF format. All property descriptions are included as an appendix in the *Marketing Platform Administrator's Guide*.

## About refreshing the display

A refresh button  located at the top of the Configuration navigation tree provides the following functions.

- Refreshes the contents of the tree, which is useful you want to obtain the latest information on configuration settings, which may have been updated while you are viewing the tree (for example, when an application has been registered or unregistered or when someone else has updated settings using the Configuration pages).
- Returns the navigation tree to the state it was in the last time you selected a node, collapsing or expanding the tree as necessary.

---

! If you are in edit mode when you click **Refresh**, the page is returned to the read mode. Any unsaved changes are lost.

---

## About the default user locale preference

The Marketing Platform contains a default locale attribute that applies to all IBM Unica Marketing applications that implement it. You can set this default by setting the value of the **Region setting** property in the **Suite** category.

For details on this property, see its online help in the Configuration area or the *Marketing Platform Administrator's Guide*. To learn whether an IBM Unica Marketing application implements this attribute, see that application's documentation.

In addition, you can override these default values on a per-user basis by changing the value of this property in the user's account. See [Setting the per-user locale preference](#) for details.

## Editing property values

This section describes how to edit property values on the Configuration page.

### To navigate to a category

1. Log in to IBM Unica Marketing.
2. Click **Settings > Configuration** in the toolbar.

The Configuration page displays the Configuration Categories tree.

3. Click the plus sign beside a category.

The category opens, displaying sub-categories. If the category contains properties, they are listed along with their current values.

4. Continue to expand the categories and sub-categories until the property you want to edit displays.

## To edit property values

1. Navigate to the category that contains the property you want to set, as described in [To navigate to a category](#).

The category's Settings page displays with a list of all the properties in the category and their current values.

2. Click **Edit Settings**.

The category's Edit Settings page displays with the property values in editable fields.

3. Enter or edit values as desired.

In UNIX, all file and directory names are case-sensitive. The case of any file and folder name you enter must match the case of the file or folder name on the UNIX machine.

4. Click **Save and Finish** to save your changes or **Cancel** to exit the page without saving.

## Duplicating and deleting categories

This section describes how duplicate and delete categories on the Configuration page.

### To create a new category from a template

1. On the Configuration page, navigate to the template category you want to duplicate.

Unlike other categories, template category labels are in italics and enclosed in parentheses.

2. Click the template category.

The Create category from Template page displays.

3. Enter a name in the **New category name** field (required).
4. If desired, edit properties within the new category. You can also do this later.
5. Click **Save and Finish** to save the new configuration.

The new category appears in the navigation tree.

### To delete a category

1. On the Configuration page, navigate to the category you want to delete and click to select it.

The category's Settings page displays.

2. Click the **Delete Category** link.

A window displays the message, Are you sure you want to delete "*category name*"?

3. Click **OK**.

The category no longer appears in the navigation tree.

# D Setting up IBM Unica Marketing System Users

- About setting up Unica Marketing system users
- To add a new user account
- To add an internal user data source
- To change an internal user data source password or login name
- To delete an internal user data source

## About setting up Unica Marketing system users

This section contains general procedures for setting up a new IBM Unica Marketing user and adding a IBM Unica Marketing data source to that user, both of which are necessary when you create a system user for many IBM Unica Marketing products.

For complete information on working with IBM Unica Marketing users, see the *Unica Marketing Platform Administrator's Guide*.

## To add a new user account

1. Click **Settings > Users**.  
The **Username** list is displayed in the left pane.
2. Click the **New User** button above the **Username** list in the left pane.  
The **New User** page appears in the right pane.
3. Complete the form and click **Save Changes**.  
A window displays the message, Save Successful.
4. Click **OK**.  
The new user name appears in the list in the left pane.

## To add an internal user data source

1. Click **Settings > Users**.  
The **Username** list is displayed in the left pane.
2. Click the name of the account you want to change.  
The user account details appear in the right pane.
3. Click the **Edit Data Sources** link at the bottom of the page.  
The user's Data Sources List page appears in the right pane.
4. Click **Add New** .  
The New Data Sources page appears in the right pane.
5. Complete the form and click **Save Changes** to save your changes.  
A window displays the message, Save Successful.
6. Click **OK**.  
The user's Data Sources List page appears in the right pane, with the new Data Source Name and Data Source Login listed.

## To change an internal user data source password or login name

1. Click **Settings > Users**.  
The **Username** list is displayed in the left pane.
2. Click the name of the account you want to change.  
The user account details appear in the right pane.
3. Click the **Edit Data Sources** link at the bottom of the page.  
The user's Data Sources List page appears in the right pane.
4. Click the **Data Source Name** you want to change.  
The Edit Data Source Properties page appears in the right pane, with data in all editable fields.
5. Edit the fields as desired. See [To change internal user account properties](#) for details.  
If you do not set a new password, the old one is retained.
6. Complete the form and click **Save Changes** to save your changes.  
A window displays the message, **Save Successful**.
7. Click **OK**.

The user's Data Source List page appears in the right pane, with the new login name listed, if you changed it.

## To delete an internal user data source

1. Click **Settings > Users**.  
The **Users** list is displayed in the left pane.
2. Click the name of the account you want to change.  
The user account details appear in the right pane.
3. Click the **Edit Data Sources** link at the bottom of the page.  
The user's data sources are listed.
4. Click the name of the data source you want to delete.  
The data source details are listed.
5. Click **Delete**.  
A window displays the message, Are you sure you want to delete this data source?
6. Click **OK**.  
The user's data sources are listed, and the data source you deleted is removed.

# E IBM Unica Utilities

- IBM Unica utilities
- The configTool utility
- The populateDb utility

## IBM Unica utilities

This section describes the utilities you may need to use when you install Campaign.

Campaign also includes several administrative utilities. For information about these utilities, see the *Campaign Administrator's Guide*.

## The configTool utility

The properties and values on the Configuration page are stored in the Marketing Platform system tables. The `configTool` utility imports and exports configuration settings to and from the IBM Unica Marketing Platform system tables.

### When to use configTool

You might want to use `configTool` for the following reasons.

- To import partition and data source templates supplied with Campaign, which you can then modify and/or duplicate using the Configuration page.
- To register (import configuration properties for) IBM Unica Marketing products, if the product installer is unable to add the properties to the database automatically.
- To export an XML version of configuration settings for backup or to import into a different installation of IBM Unica Marketing.
- To delete categories that do not have the **Delete Category** link. You do this by using `configTool` to export your configuration, then manually deleting the XML that creates the category, and using `configTool` to import the edited XML.

---

! This utility modifies the `usm_configuration` and `usm_configuration_values` tables in the Marketing Platform system table database, which contain the configuration properties and their values. For best results, either create backup copies of these tables, or export your existing configurations using `configTool` and back up the resulting file so you have a way to restore your configuration if you make an error when using `configTool` to import.

---

## Valid product names

The `configTool` utility uses product names as parameters with the commands that register and unregister products, as described later in this section. With the 8.0.0 release of IBM Unica Marketing, many product names have changed. However, the names recognized by `configTool` have not changed. The valid product names for use with `configTool` are listed below, along with the current names of the products.

Product name	Name used in config-Tool
Marketing Platform	Manager
Campaign	Campaign
Distributed Marketing	Collaborate
eMessage	emessage
Interact	interact
Optimize	Optimize
Marketing Operations	Plan
CustomerInsight	Insight
NetInsight	NetInsight
PredictiveInsight	Model
Leads	Leads

## Syntax

```
configTool -d -p "elementPath" [-o]
```

```
configTool -i -p "parent ElementPath" -f importFile [-o]
```

```
configTool -x -p "elementPath" -f exportFile
```

```
configTool -r productName -f registrationFile [-o]
```

```
configTool -u productName
```

## Commands

**-d -p "elementPath"**

Delete configuration properties and their settings, specifying a path in the configuration property hierarchy.

The element path must use the internal names of categories and properties, which you can obtain by going to the Configuration page, selecting the desired category or property, and looking at the path displayed in parentheses in the right pane. Delimit a path in the configuration property hierarchy using the | character, and surround the path with double quotes.

Note the following.

- Only categories and properties within an application may be deleted using this command, not whole applications. Use the `-u` command to unregister a whole application.
- To delete categories that do not have the **Delete Category** link on the Configuration page, use the `-o` option.

**`-i -p "parentElementPath" -f importFile`**

Import configuration properties and their settings from a specified XML file.

To import, you specify a path to the parent element under which you want to import your categories. The `configTool` utility imports properties *under* the category you specify in the path.

You can add categories at any level below the top level, but you cannot add a category at same level as the top category.

The parent element path must use the internal names of categories and properties, which you can obtain by going to the Configuration page, selecting the desired category or property, and looking at the path displayed in parenthesis in the right pane. Delimit a path in the configuration property hierarchy using the | character, and surround the path with double quotes.

You can specify an import file location relative to the `tools/bin` directory or you can specify a full directory path. If you specify a relative path or no path, `configTool` first looks for the file relative to the `tools/bin` directory.

By default, this command does not overwrite an existing category, but you can use the `-o` option to force an overwrite.

**`-x -p "elementPath" -f exportFile`**

Export configuration properties and their settings to an XML file with a specified name.

You can export all configuration properties or limit the export to a specific category by specifying a path in the configuration property hierarchy.

The element path must use the internal names of categories and properties, which you can obtain by going to the Configuration page, selecting the desired category or property, and looking at the path displayed in parenthesis in the right pane. Delimit a path in the configuration property hierarchy using the | character, and surround the path with double quotes.

You can specify an export file location relative to the current directory or you can specify a full directory path. If the file specification does not contain a separator (`/` on Unix, `/` or `\` on Windows), `configTool` writes the file to the `tools/bin` directory under your Marketing Platform installation. If you do not provide the `xml` extension, `configTool` adds it.

**-r *productName* -f *registrationFile***

Register the application. The registration file location may be relative to the `tools/bin` directory or may be a full path. By default, this command does not overwrite an existing configuration, but you can use the `-o` option to force an overwrite. The `productName` parameter must be one of those listed above.

**-u *productName***

Unregister an application specified by `productName`. You do not have to include a path to the product category; the product name is sufficient. The `productName` parameter must be one of those listed above. This removes all properties and configuration settings for the product.

## Options

**-o**

When used with `-i` or `-r`, overwrites an existing category or product registration (node).

When used with `-d` allows you to delete a category (node) that does not have the **Delete Category** link on the Configuration page.

## Examples

- Import configuration settings from a file named `Product_config.xml` located in the `conf` directory under the Marketing Platform installation.

```
configTool -i -p "Affinium" -f Product_config.xml
```

- Import one of the supplied Campaign data source templates into the default Campaign partition, `partition1`. The example assumes that you have placed the Oracle data source template, `OracleTemplate.xml`, in the `tools/bin` directory under the Marketing Platform installation.

```
configTool -i -p  
"Affinium|Campaign|partitions|partition1|dataSources" -f  
OracleTemplate.xml
```

- Export all configuration settings to a file named `myConfig.xml` located in the `D:\backups` directory.

```
configTool -x -f D:\backups\myConfig.xml
```

- Export an existing Campaign partition (complete with data source entries), save it to a file named `partitionTemplate.xml`, and store it in the default `tools/bin` directory under the Marketing Platform installation.

```
configTool -x -p "Affinium|Campaign|partitions|partition1" -f  
partitionTemplate.xml
```

- Manually register an application named `productName`, using a file named `app_config.xml` located in the default `tools/bin` directory under the Marketing Platform installation, and force it to overwrite an existing registration of this application.

```
configTool -r product Name -f app_config.xml -o
```

- Unregister an application named `productName`.

```
configTool -u productName
```

## The populateDb utility

The `populateDb` utility inserts default (seed) data in the Marketing Platform system tables. Currently it performs this task for the Marketing Platform and Campaign.

The IBM installer can populate the Marketing Platform system tables with default data for the Marketing Platform and for Campaign. However, if your company policy does not permit this, or if the installer is unable to connect with the Marketing Platform system tables, you must insert default data in the Marketing Platform system tables using this utility.

For Campaign, this data includes security roles and permissions for the default partition. For the Marketing Platform, this data includes configuration properties, default users and groups, and security roles and permissions for the default partition.

### Syntax

```
populateDb -n productName
```

### Commands

**-n *productName***

Insert default data into the Marketing Platform system tables. Valid product names are `Manager` (for the Marketing Platform) and `Campaign` (for Campaign).

### Examples

- Insert Marketing Platform default data manually.

```
populateDb -n Manager
```

- Insert Campaign default data manually.

```
populateDb -n Campaign
```