

IBM Unica Campaign
Version 8 Release 6
February, 2013

Installation Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 101.

This edition applies to version 8, release 6, modification 0 of IBM Unica Campaign and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Preparing to Install

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 , consult those products' documentation.

Before you begin to install the IBM Unica Marketing software, plan your installation, including both your business objectives and the hardware and software environment required to support them.

Campaign basic installation checklist

The following list is an overview of the steps required to perform a basic installation of Campaign. Additional details about these steps are provided in the rest of this guide.

Prepare data sources

1. "Step: Create the database or schema for the Campaign system tables" on page 7
Work with a database administrator to create a database or schema for the Campaign system tables.
2. "Step: Create the ODBC or native connections on the Campaign machine" on page 7
Create ODBC or native connections to the Campaign system tables and customer (user) tables.
3. "Step: Configure the web application server for your JDBC driver" on page 8
Add the database drivers to the web application server classpath.
4. "Step: Create the JDBC connections in the web application server" on page 9
Create JDBC connections to the Campaign and Marketing Platform system tables, using the required and recommended JNDI names.

Install IBM Unica Campaign

1. "Step: Obtain the IBM Unica installers" on page 13
Obtain the Campaign and report package installers.
2. Gather the required database and web application server information.
See "Information required to install all IBM Unica Marketing products" on page 19.
3. "Step: Run the IBM Unica installer" on page 19
With the Marketing Platform installed, deployed, and running, install Campaign.

Configure IBM Unica Campaign before deployment

1. "Step: Create and populate the Campaign system tables manually, if necessary" on page 23

If you did not choose to allow the Campaign installer to create the system tables automatically, use the provided SQL scripts to create and populate the system tables.

2. “Step: Register Campaign manually, if necessary” on page 25
If the installer was unable to register Campaign, use Marketing Platform utilities to register manually.
3. “Step: Set data source variables in the Campaign startup script (UNIX only)” on page 26
If you install on UNIX and need to enable access to database types other than the one in which the system tables reside, add database environment variables and library paths to the startup script.

Deploy IBM Unica Campaign

1. Follow the deployment guidelines in Chapter 5, “Deploying the Campaign web application,” on page 29.
2. “Start the Campaign server” on page 33
You can start the server directly or (on a Windows installation) install it as a service on your operating system.

Configure IBM Unica Campaign after deployment

1. “Step: Verify the Campaign listener is running” on page 35
Confirm that the Campaign listener is running. The listener must be running before you can work with any Campaign features.
2. “Step: Set up the Campaign system user” on page 35
Set up a IBM Unica system user in the **Settings > Users** area to hold data source credentials.
3. “Step: Add data source properties on the Configuration page” on page 36
For each database or schema that your installation of Campaign will use, import the templates appropriate for the vendor or vendors. Then use the templates to create a set of database configuration properties for each database or schema.
4. “Steps: Set required Campaign properties on the Configuration page” on page 37
Set the database properties and other required properties on the **Settings > Configuration** page.
5. “Step: Map user tables in Campaign” on page 38
Map your customer (user) tables.
6. “Step: Verify the Campaign installation” on page 38
Confirm that you can create a campaign and a flowchart.

If you are upgrading or configuring multiple partitions

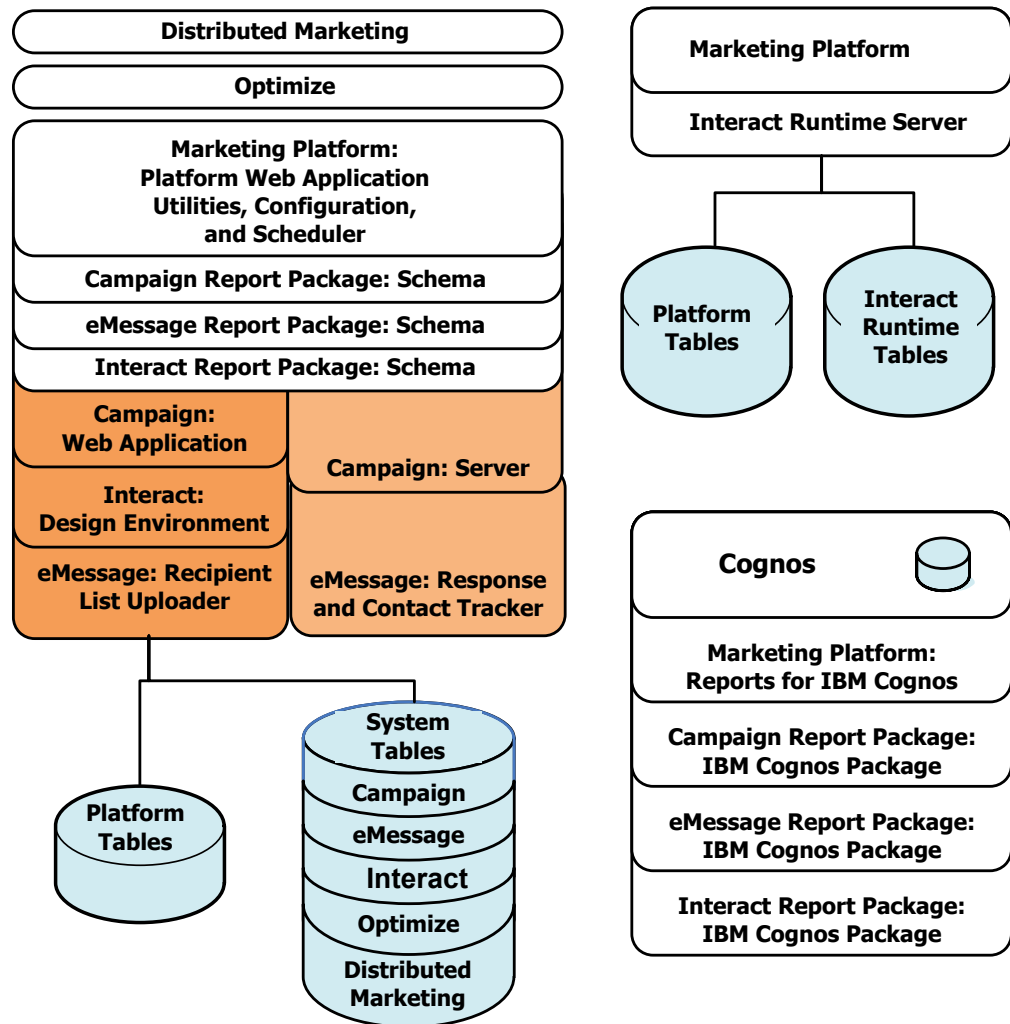
If you are upgrading, see the sections on preparing to upgrade.

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

IBM Unica components and where to install them

The following diagram provides a brief overview of where to install IBM Unica applications.

This setup is the basic installation that functions. You might 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 *IBM Unica Marketing Enterprise Products Recommended Software Environments and Minimum System Requirements* guide.

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 might need to create an Oracle 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 are installed. This knowledge includes the operating systems, databases, and web application servers.

Client machines

Client machines must meet the following configuration requirements.

- Campaign uses an ActiveX control for flowcharts and administration functions. This flowchart automatically downloads when needed. The recommended security setting 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 plug-ins
 - 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 software to block pop-up ad windows is installed on the client machine, Campaign might not function properly. For best results, disable the software to block pop-up ad windows 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.

Appropriate permissions include:

- 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, `rwxr-xr-x`).

Marketing Platform requirement

Before you install any IBM Unica Marketing products, the Marketing Platform must be installed.

For each group of products that will work together, you need to install the Marketing Platform only once.

After installation, when you are ready to use the Marketing Platform to set configuration properties on the **Settings > Configuration** page, the Marketing Platform must be deployed and running on the Web application server.

Check for a JAVA_HOME environment variable

If you have a JAVA_HOME environment variable defined on the machine where you are installing an IBM Unica Marketing product, verify that it is pointing to version 1.6 of the Sun JRE.

This environment variable is not required for installing IBM Unica Marketing products, but if it is present, it must point to the 1.6 version of the Sun JRE.

If you have a JAVA_HOME environment variable, and it points to an incorrect JRE, you must unset the JAVA_HOME variable before you run the IBM Unica Marketing installers. You can do this as follows.

- Windows: In a command window, enter
`set JAVA_HOME=leave empty and press return key`
- UNIX-type systems: In the terminal, enter
`export JAVA_HOME=leave empty and press return key`

After the environment variable is unset, the IBM Unica Marketing installers use the JRE bundled with the installers.

You can reset the environment variable when installation is complete.

Integration of eMessage with Campaign

When IBM Unica Campaign is integrated with IBM Unica eMessage, you can use eMessage to conduct highly personalized email marketing campaigns.

eMessage provides access to resources hosted by IBM so you can design, send, and monitor individually customized messages based on information stored in your customer datamart.

- In Campaign, use flowcharts to create lists of email recipients and select personalization data for each recipient.
- In eMessage, use email design, transmission, and deliverability resources hosted by IBM to conduct email marketing campaigns.

About eMessage configuration

IBM Unica eMessage is installed automatically when you install Campaign. However, eMessage is not configured or enabled during the Campaign installation process.

To use eMessage after you install Campaign, you must purchase a hosted email subscription. You then configure eMessage to establish a secure connection to

hosted email resources that IBM maintains as part of IBM Unica Hosted Services. You access these email resources through a hosted email account that IBM creates as part of your subscription.

To learn how to install and configure eMessage, see the following documents:

- The *IBM Unica Campaign Installation Guide* explains how to install or upgrade eMessage. It also explains how to prepare the "On Premises" eMessage components that are installed in the local environment.
- The *IBM Unica eMessage Startup and Administrator's Guide* explains how to connect to the "On Demand" hosted email resources. It also explains how to maintain and monitor your eMessage implementation.

Upgrading existing eMessage installations

If you already use eMessage 8.x in conjunction with Campaign, upgrading to the most recent 8.x version of Campaign automatically upgrades your current eMessage installation.

For more information about upgrading eMessage 8.x, see "About eMessage and upgrading Campaign" on page 73.

If you are currently using Affinium Campaign eMessage 7.x, see "Upgrading Campaign if Affinium Campaign eMessage 7.x is installed" on page 67.

Requirements for eMessage reports

IBM Unica Marketing integrates with IBM Cognos® to provide reporting features. To view standard eMessage performance reports, you must install the supported version of IBM Cognos and the associated report pack for IBM Unica Campaign. Standard eMessage reports are installed as part of the Campaign reports pack.

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

Chapter 2. Preparing data sources for Campaign

To prepare data sources for Campaign, you perform the procedures described in the following steps.

1. “Step: Create the database or schema for the Campaign system tables”
2. “Step: Create the ODBC or native connections on the Campaign machine”
3. “Step: Configure the web application server for your JDBC driver” on page 8
4. “Step: Create the JDBC connections in the web application server” on page 9

If you are configuring multiple partitions, you should read Chapter 7, “Configuring multiple partitions in Campaign,” on page 41.

Step: Create the database or schema for the Campaign system tables

1. Work with a database administrator to create a database or schema to hold the Campaign system tables.
Note that Campaign also requires customer (user) tables, which should already exist.
2. Have the database administrator create an account that you will specify for a system user later in the installation process.
This account must have at least CREATE, DELETE, DROP, INSERT, SELECT, and UPDATE rights.
3. Print the “IBM Unica Campaign database information checklist” on page 11. Obtain the information about your database or schema and database account and note this information in the checklist. Continue to fill in the checklist as you perform the rest of the steps in this section, because you will use this information later in the installation process.

Step: Create the ODBC or native connections on the Campaign machine

The machine on which the Campaign server is installed must have an ODBC or native connection to the following databases.

- The database or schema that contains the Campaign system tables
- The database or schema that contains the customer (user) tables.

Use the following guidelines to create these ODBC or native connections.

- For databases on UNIX: You create native connections (for DB2[®] and Oracle databases) or ODBC connections (for other databases such as SQL Server, Teradata, Netezza[®], and so on). The procedure for creating a native data source differs depending on the data source type and the version of UNIX. See the data source and operating system documentation for specific ODBC driver installation and configuration instructions.
- For databases on Windows: You create a new ODBC connection in the Control Panel's **Administrative Tools > Data Sources (ODBC)** section.

Note the ODBC name in the “IBM Unica Campaign database information checklist” on page 11.

Step: Configure the web application server for your JDBC driver

You must obtain the correct JAR file for the JDBC connections Campaign requires. You must also add the location of the file to the classpath of the web application server where you plan to deploy Campaign.

If Campaign must connect to databases from different vendors, perform this procedure for each database type. See “Step: Create the JDBC connections in the web application server” on page 9 to determine the JDBC connections that Campaign requires.

1. Obtain the latest vendor-provided Type 4 JDBC driver supported for use with IBM Unica products.
 - If the driver does not exist on the machine where the Campaign web application will be deployed, obtain it and copy it to the machine. You may copy it to any location on the machine. To avoid potential path issues, unpack the driver in a path that does not include spaces.
 - If you obtain the driver from a machine where the data source client is installed, verify that the version is the latest supported for use with IBM Unica products.

The following table lists the driver files for database types supported for IBM Unica Marketing system tables.

Note: For a list of third-party requirements, see the *IBM Unica Campaign Recommended Software Environments and Minimum System Requirements*. This file is posted under Documentation on the IBM Unica Product Technical Support website: http://www-947.ibm.com/support/entry/portal/open_service_request. It is also available by selecting **Help > Product documentation** from IBM Unica Marketing.

Database type	JDBC driver files
Oracle 11gR1, Oracle 11gR2	ojdbc14.jar (for JVM 1.4) ojdbc5.jar (for JVM 1.5) ojdbc6.jar (for JVM 1.6)
DB2	db2jcc.jar db2jcc_license_cu.jar (not present in v9.5 and later)
SQL Server 2008 R2	sqljdbc.jar (for JVM 1.4 or 1.5) sqljdbc4.jar version 2 or 3 (for JVM 1.6)

2. Include the full path to the driver, including the file name, in the classpath of the web application servers where you plan to deploy the Campaign web application.
 - For all supported versions of WebLogic, set the classpath in the `setDomainEnv` script in the `WebLogic_domain_directory/bin` directory where environment variables are configured.

Your driver entry must be the first entry in the CLASSPATH list of values, before any existing values, to ensure that the web application server uses the correct driver. For example:

UNIX

```

CLASSPATH="/home/oracle/product/<version>/jdbc/lib/ojdbc14.jar:
${PRE_CLASSPATH}${CLASSPATHSEP}${WEBLOGIC_CLASSPATH}
${CLASSPATHSEP}${POST_CLASSPATH}${CLASSPATHSEP}${WLP_POST_CLASSPATH}"
export CLASSPATH

```

Windows

```

set CLASSPATH=c:\oracle\jdbc\lib\ojdbc14.jar;%PRE_CLASSPATH%;
%WEBLOGIC_CLASSPATH%;%POST_CLASSPATH%;%WLP_POST_CLASSPATH%

```

- For all supported versions of WebSphere, set the classpath in the Administration console while you are setting up the JDBC providers for the IBM Unica Marketing products.
 - For DB2 9.5, specify full location of db2jcc.jar only.
 - For DB2 9.7, specify full location of db2jcc.jar only.
 - For Oracle 11gR1 and 11gR2, specify full location of the ojdbc65.jar of jre 1.6 version.
3. Restart the web application server so your changes take effect. During startup, monitor the console log to confirm that the classpath contains the path to the database driver.

Step: Create the JDBC connections in the web application server

The Campaign web application must be able to communicate with the required databases using JDBC connections. You create these JDBC connections in the web application server where you plan to deploy Campaign.

Use the following list to determine which JDBC connections you must create for the Campaign web application. The list includes the suggested and required JNDI names.

1. A connection to the database holding the Campaign system tables:
 - If there is one partition, the suggested JNDI name is campaignPartition1DS.
 - If there is more than one partition, a best practice is to use campaignPartition1DS for the first connection, campaignPartition2DS for the second, and so on.

Note: This practice is provided as an example only. You can specify any JNDI names for Campaign system table connections.

2. A connection to the database holding the Marketing Platform system tables. Use UnicaPlatformDS as the JNDI name.

Important: UnicaPlatformDS is the required JNDI name.

If you are deploying Campaign in the same JVM as your Marketing Platform deployment, you have probably already set up this connection.

For more information about creating JDBC connections in your web application server, see the WebLogic or WebSphere documentation.

Note: If you are using WebLogic to configure a data source to an Oracle or DB2 database, you must also specify the database user name in the form user=<DBUser> in the Properties section on the Connection Pool tab. For more information, see your WebLogic documentation.

Make a note of all JNDI names in the “IBM Unica Campaign database information checklist” on page 11.

Information for JDBC connections

When you create a JDBC connection, you can use this section to help you determine some of the values you must enter. If you are not using the default port setting for your database, change it to the correct value.

This information does not exactly reflect all of the information required by the web application servers. Where this section does not provide explicit instructions, you can accept the default values. Consult the application server documentation if you need more comprehensive help.

WebLogic

Use these values if your application server is WebLogic.

SQLServer

- Driver: Microsoft MS SQL Server Driver (Type 4) Versions: 2008, 2008R2
- Default port: 1433
- Driver class: com.microsoft.sqlserver.jdbc.SQLServerDriver
- Driver URL: jdbc:sqlserver://
<your_db_host>:<your_db_port>;databaseName=<your_db_name>
- Properties: Add user=<your_db_user_name>

Oracle 11 and 11g

- Driver: Other
- Default port: 1521
- Driver class: oracle.jdbc.OracleDriver
- Driver URL:
jdbc:oracle:thin:@<your_db_host>:<your_db_port>:<your_db_service_name>
- Properties: Add user=<your_db_user_name>

DB2

- Driver: Other
- Default port: 50000
- Driver class: com.ibm.db2.jcc.DB2Driver
- Driver URL: jdbc:db2://<your_db_host>:<your_db_port>/<your_db_name>
- Properties: Add user=<your_db_user_name>

WebSphere

Use these values if your application server is WebSphere.

SQLServer

- Driver: N/A
- Default port: 1433
- Driver class: com.microsoft.sqlserver.jdbc.SQLServerConnectionPoolDataSource
- Driver URL: N/A

In the **Database Type** field, select **User-defined**.

After you create the JDBC Provider and Data Source, go to the Custom Properties for the Data Source, and add and modify properties as follows.

- `serverName=<your_SQL_server_name>`
- `portNumber =<SQL_Server_Port_Number>`
- `databaseName=<your_database_name>`
- `enable2Phase = false`

Oracle 11 and 11g

- Driver: Oracle JDBC Driver
- Default port: 1521
- Driver class: `oracle.jdbc.OracleDriver`
- Driver URL:
`jdbc:oracle:thin:@<your_db_host>:<your_db_port>:<your_db_service_name>`

DB2

- Driver: DB2 Universal JDBC Driver Provider
- Default port: 50000
- Driver class: `com.ibm.db2.jcc.DB2Driver`
- Driver URL: `jdbc:db2://<your_db_host>:<your_db_port>/<your_db_name>`

IBM Unica Campaign database information checklist

Record the information about the database holding your Campaign system tables.

Field	Notes
Database type	
Database name	
Database account user name	
Database account password	
JNDI name	
ODBC name	

Only if you are installing on UNIX, obtain the following additional information. You will use it when you edit the `setenv.sh` file during the installation and configuration process.

Database information	Notes
If your database type is one of the following, note the database installation directory. <ul style="list-style-type: none"> • DB2 • Oracle 	
If your database type is one of the following, note the location of the <code>ODBC.ini</code> file. <ul style="list-style-type: none"> • Netezza • Teradata 	
For all database types when Campaign is installed on the Solaris, Linux, or AIX® operating systems, note the location of the <code>lib</code> directory in the database installation.	

Chapter 3. Installing Campaign

Installing IBM Unica Campaign involves obtaining the correct set of installer files for your operating system, placing them into the correct locations with access to the system where you want to install the product, and ensuring that all prerequisites are met before continuing.

Be aware that you must have the installation files or an installed instance of IBM Unica Marketing Platform prior to continuing the Campaign installation. If you have not already done so, see the *IBM Unica Marketing Platform Installation Guide* for details.

Step: Obtain the IBM Unica installers

Obtain the DVD, or download the software from IBM.

If necessary, refer to the materials provided to you at the time of purchase, or contact your IBM Unica representative, for the download location for the installation files.

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

- The IBM Unica installer.
- The Campaign installer.

If you plan to use the IBM Unica reporting feature, see the *Marketing Platform Installation Guide* for instructions on how to install it.

Note: If you plan to use IBM Unica eMessage with Campaign for email marketing, you must install the IBM Unica reporting feature so that you can view standard eMessage performance reports. The eMessage reports are contained in the Campaign reports pack.

Setting permissions on UNIX-type systems

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

Choosing the right installer file

The installation files are named according to the version of the product and 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.

Here are some examples of the installers you would choose based on your installation environment.

Windows - GUI and console mode - *Product_N.N.N._win64.exe* is version N.N.N.N and is intended for installation on the Windows 64-bit operating system.

UNIX - X-windows mode - *Product_N.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 - *Product_N.N.N.N.sh* is version N.N.N.N and is intended for installation on all UNIX operating systems.

About installing eMessage with Campaign

When you install IBM Unica Campaign, the installer automatically includes files required to support IBM Unica eMessage:

- eMessage is created as a sub-directory in the Campaign directory structure.
- eMessage configuration properties are listed in the IBM Unica Marketing Platform, but they are not active.
- eMessage-specific database tables are created in the Campaign schema but they contain only initial data.
- Menus and other features specific to eMessage do not appear until you enable and configure eMessage.

For information about installed eMessage components, see “Where eMessage components are installed.”

Before you can send personalized marketing email, you must request a hosted email account from IBM.

When you request an email account, IBM begins a consultation process to familiarize you with eMessage, connect you to hosted email resources, and establish your reputation as a legitimate email marketer among leading Internet Service Providers (ISPs). Establishing a favorable reputation is critical to successfully delivering your marketing message to your customers and prospects.

For more information about how to enable and configure eMessage and prepare your hosted email account, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Where eMessage components are installed

eMessage requires specialized components called the Recipient List Uploader (RLU) and the Response and Contact Tracker (RCT).

The Recipient List Uploader (RLU) is a eMessage plugin component that operates with Campaign to upload addresses, personalization data, and metadata associated with a list of email recipients to IBM Unica Hosted Services.

The eMessage Response and Contact Tracker (RCT) retrieves link tracking and email delivery notification data from IBM Unica Hosted Services, and stores the data in the eMessage system tables that reside in the Campaign schema.

These components operate only when you enable and configure IBM Unica eMessage. For more information about enabling eMessage and working with the RLU and RCT, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Default component installation locations

The IBM Unica installer places the RLU on the machine where you installed the Campaign J2EE application. The RLU location is recorded in the configuration property Campaign > partitions > partition1 > eMessage > eMessagePluginJarFile.

The installer places the RCT on the machine where you installed the Campaign server.

If the J2EE and server components are on separate machines, run the installer on each machine to install the RLU with the J2EE application and the RCT with the Campaign server.

eMessage components in multiple partitions

There is only one RLU for the entire eMessage installation. The installer populates the eMessagePluginJarFile configuration property only for partition1 (the default partition). If you are using multiple partitions in your eMessage installation, you must manually configure the location of the RLU for all other partitions. The location specified in the eMessagePluginJarFile property is the same for all partitions. For more information, see “Step: Specify the location of the RLU for the partition” on page 56.

There is only one RCT for the entire eMessage installation but eMessage does not need to specify its location in a configuration property. Responses received by the RCT automatically specify the appropriate local partition for correct response attribution.

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 Marketing installers.

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. You can then 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 shows the latest version of the product on the IBM Unica Products screen in the installation wizard.

Installing patches

You might be planning to install a patch immediately after you perform a new installation of an IBM Unica product. If so, 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. The installer then installs both in correct order.

Choosing product installation directories

You can install to any directory on any network-accessible system. 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 IBM/Unica. The product installers then install in subdirectories under the Unica directory.

Installation types

The IBM Unica Marketing 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 is installed, the installer automatically performs an upgrade installation. For products where installers automatically update the database, upgrade installation adds new tables but does not overwrite data in existing tables.

For products where installers automatically update the database, errors can occur during an upgrade because the installer does not create tables in the database if they exist. You can safely ignore these errors. See the chapter on Upgrading for details.

- **Reinstallation:** When you run the installer and select a directory where *the same* version of an IBM Unica Marketing product is installed, the installer overwrites your existing installation. To preserve any existing data, back up your installation directories and your system table databases before reinstalling. Typically, reinstallation is not recommended.

Installation modes

The IBM Unica Marketing installer can run in the following modes.

- Console (command line) mode

In console mode, options are presented in numbered lists. You supply a number to select the option you want. If you press Enter without entering a number, the installer uses the default option. The default option is indicated by one of the following symbols.

--> To select an option when this symbol appears, type the number of the option you want then press Enter.

[X] This symbol indicates that you can choose one, several, or all of the options in the list. If you type the number of an option that has the [X] symbol next to it then press Enter, you clear or deselect that option. If you type the number of an option that is not currently selected (it has [] next to it), that option is selected when you press Enter.

To deselect or select more than one option, enter a comma-separated list of numbers.

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

Unattended mode can be used to install an IBM Unica Marketing product multiple times. For more information, see “Installing multiple times using unattended mode.”

Installing multiple times using unattended mode

If you must install IBM Unica Marketing products multiple times, you can run the IBM Unica installer in unattended mode, which requires no user input.

About the response files

Unattended mode (also known as silent mode) requires a file or set of files to provide the information that a user would enter at the installation prompts when using the console or GUI modes. These files are known as response files.

You can use either of these options to create response files.

- You can use the sample response file as a template for directly creating your response files. The sample files are included with your product installers in a compressed archive named `ResponseFiles`. The response files are named as follows.
 - IBM Unica installer - `installer.properties`
 - Product installer - `installer_` followed by initials for the product name. For example, the Campaign installer has a response file named `installer_uc.properties`.
 - Product reports packs installer - `installer_` followed by initials for the product name plus `rp`. For example, the Campaign reports pack installer has a response file named `installer_urpc.properties`.

Edit the sample files as needed and place them in the same directory with your installers.

- Before you set up an unattended run, you can run the installer in Windows GUI or UNIX X-windows mode or in Console mode and choose to create the response files.

The IBM Unica master installer creates one file, and each IBM Unica product you install also creates one or more files.

The response files have `.properties` extensions, such as `installer_product.properties` and the file for the IBM Unica installer itself, which is named `installer.properties`. The installer creates these files in the directory you indicate.

Important: For security reasons, the installer does not record database passwords in the response files. When you create response files for unattended mode, you must edit each response file to enter database passwords. Open each response file and search for `PASSWORD` to find where you must perform these edits.

Where the installer looks for response files

When the installer runs in unattended mode, it looks for the response file as follows.

- First, the installer looks in the installation directory.
- Next, the installer looks in the home directory of the user performing the installation.

All response files must be in the same directory. You can change the path where response files are read by adding arguments to the command line. For example:

```
-DUNICA_REPLAY_READ_DIR="myDirPath" -f myDirPath/installer.properties
```

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).

Unattended mode and upgrades

When you are upgrading, if a response file was previously created and you run in unattended mode, the installer uses the installation directory that was previously set. If you want to upgrade using unattended mode when no response file exists, create a response file by running the installer manually for your first installation, and be sure to select your current installation directory in the installation wizard.

Selecting IBM Unica Campaign components

You can install the Campaign server and the web application on the same machine, or on different machines.

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

Component	Description
Campaign Server	The Campaign startup scripts and components that support the design and execution of Campaign flowcharts. The primary components are the listener (<code>unica_aclsnr.exe</code>), which must always be running, and the server (<code>unica_acsvr.exe</code>). The listener spawns a separate <code>unica_acsvr.exe</code> process for each login and each active flowchart. For example, if one user logs in and then opens a flowchart, the listener spawns two instances of <code>unica_acsvr.exe</code> .
J2EE Application	The web application that provides the Campaign user interface.
Developer Toolkits	The validation classes that are used to implement custom validation.
Campaign System Table DDL Files	SQL scripts used to create and populate the Campaign system tables.
Upgrade Tools	Tools for completing upgrades.

Selecting IBM Unica Campaign Report Package components

The reports package for Campaign contains two installation components:

- Install the reporting schemas on the Marketing Platform system.
- Install the IBM Cognos package on the IBM Cognos system.

The following table describes the components you can select when you install the reports package for Campaign.

Component	Description
Reporting schemas (to be installed on the IBM Unica system)	The Campaign reporting schema templates enable you to make performance, campaign, offer, and cell information available for reporting.
IBM Cognos package for IBM Unica Campaign (to be installed on the IBM Cognos system)	The IBM Cognos package includes a reporting metadata model for the Campaign system tables and a set of example reports that you can use to track campaigns, offers, and cells.

Information required to install all IBM Unica Marketing products

Gather the required information as described in this section.

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, 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 database or schema.

Web component information

For all IBM Unica Marketing products that have a web component that you deploy on a web application server, you must obtain the following.

- The name of the systems on which the web application servers are installed. You might have one or several, depending on the IBM Unica Marketing environment you are setting up.
- The port on which the application server listens. If you plan to implement SSL, obtain the SSL port.
- The network domain for your deployment system. For example, `mycompany.com`.

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. Both the IBM Unica and product installers must be in the same directory.

- You have available the information you gathered as described in “Information required to install all IBM Unica Marketing products” on page 19.

If you are rerunning the installer on a system where other IBM Unica products are installed, do not reinstall these other 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 Window System 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.

Note: On Solaris, you must run the installer from a Bash shell.

- 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” on page 17.

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.

IBM Site ID

The installer might 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 might 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.

If you do not want to have such information collected, after the Marketing Platform is installed, log on to the Marketing Platform as a user with administration privileges. Navigate to the **Settings > Configuration** page, and set the **Disable Page Tagging** property under the **Platform** category to **True**.

Database environment variables

During installation, the installer may prompt you for the type of database you are using. This allows the installer to automatically set some of the environment variables specific to your database installation in the web application's setenv file. For supported databases, this allows the installer to configure values automatically so that you do not need to set them manually after the installation is complete.

When the Database Type screen appears, select the type of database you are using.

For UNIX installations only, enter the following information as indicated. For database types not listed on the installer screen, you can manually configure the setenv file as described in "Step: Set data source variables in the Campaign startup script (UNIX only)" on page 26 after the installation is complete.

Database environment variables

Database	Values to Enter
IBM DB2	<ul style="list-style-type: none"> DB2 installation directory For example, /usr/lpp/db2_06_01 or C:\Program Files\IBM\SQLLIB. This is the value you might set elsewhere as the DB2DIR environment variable. DB2 instance path For example, /home/db2inst1 or C:\db2inst1.
Microsoft SQL Server	No additional settings necessary.
Oracle	<ul style="list-style-type: none"> Oracle installation directory For example, /opt/oracle or C:\oracle. This is the value you might set elsewhere as the ORACLE_BASE environment variable. Oracle's home directory For example, /home/oracle/product/11.1.0/db_1 or C:\oracle\ora11.1. This is the value you might set elsewhere as the ORACLE_HOME environment variable.

Schema Type Selection window for the Campaign report package

This window appears when you install the schema templates for Campaign because Campaign has pre-packaged custom attributes.

Option	Description
Custom	To install reporting schemas that include the custom attributes, select Custom . The sample reports for Campaign are configured to use custom attributes. Therefore, if you want the sample reports to function correctly, you must select this option.

Option	Description
Base	To install reporting schemas that do not include the custom attributes, select Base . Select this option only if you know that you plan to never use any of the pre-packaged custom attributes or any of the sample reports.

To create an EAR file after running the installer

Use this procedure if you want to create an EAR file after you have installed IBM Unica Marketing products. You might want to do this if you decide you want a different combination of products in the EAR file.

The WAR files must be in a single directory. You will run the installer in console mode, from the command line.

1. If this is the first time you are running the installer in console mode, make a backup copy of the installer's `.properties` file for each of your installed products.

Each IBM Unica product installer creates one or more response files with a `.properties` extension. These files are located in the same directory where you have placed the installers. Be sure to back up all files with the `.properties` extension, including the `installer_product.properties` files and the file for the IBM Unica installer itself, which is named `installer.properties`.

If you plan to run the installer in unattended mode, you should back up the original `.properties` files, because when the installer runs in unattended mode, it clears these files. To create an EAR file, you need the information that the installer writes in the `.properties` files during the initial install.

2. Open a command window and change directories to the directory that contains the installer.
3. Run the installer executable with this option:
`-DUNICA_GOTO_CREATEEARFILE=TRUE`
 On UNIX-type systems, run the `.bin` file rather than the `.sh` file.
 The installer wizard runs.
4. Follow the instructions in the wizard.
5. Before you create additional EAR files, overwrite the `.properties` file or files with the backup(s) you created before you ran in console mode for the first time.

Chapter 4. Configuring Campaign before deployment

This section describes configuration tasks you perform before you deploy the web application.

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

By default, the Campaign installer automatically creates and populates the necessary system tables for operation. However, if your database policies do not allow the installer to automatically perform this step, or if for some other reason you chose during installation to perform this step manually, you must complete the instructions here before you can use Campaign.

Note: If you plan to enable eMessage, you must also manually create and populate the eMessage system tables if the installer did not do so automatically. For details, see “Create and populate the eMessage system tables manually, if necessary” on page 24.

If you selected the **Campaign System Table DDL Files** option on the Campaign Components page during installation, the IBM installer installs a collection of SQL scripts that you can use to create and populate the Campaign system tables. The SQL scripts are installed in the `ddl` directory under your installation of the Campaign server. If your system tables are configured for Unicode, the appropriate scripts are in the `ddl/uni code` directory under your Campaign installation.

To use the SQL scripts, run your database client to apply the scripts to the database or schema that holds the Campaign system tables. See the documentation for your database software for instructions on running SQL scripts.

The following tables list the SQL scripts that are provided for you to use to create and populate the Campaign system tables manually.

Table 1. Scripts for creating Campaign system tables

Data source type	Script name
IBM DB2	<code>ac_systab_db2.sql</code>
Microsoft SQL Server	<code>ac_systab_sqlsvr.sql</code>
Oracle	<code>ac_systab_ora.sql</code>

Table 2. Scripts for populating Campaign system tables

Data source type	Script name
IBM DB2	<code>ac_populate_tables_db2.sql</code>
Microsoft SQL Server	<code>ac_populate_tables_sqlsvr.sql</code>
Oracle	<code>ac_populate_tables_ora.sql</code>

Create and populate the eMessage system tables manually, if necessary

eMessage requires that you create additional system tables in the Campaign schema and then populate them with initial data. These tables are used only by eMessage.

The Campaign installer automatically creates and populates the eMessage system tables in the Campaign schema if you select the option to create system tables automatically. However, if you do not select this option, you must create and populate the eMessage system tables manually.

Use your database client to run the appropriate script against the Campaign database. See the following tables to determine the scripts appropriate for your installation. The scripts that you must run depend on the type of database that hosts the Campaign schema and on whether the Campaign tables are configured for Unicode.

Note: The eMessage installation directory is a subfolder within the Campaign directory.

Scripts for creating eMessage tables

IBM provides the ace_op_systab scripts for creating the eMessage tables in your local environment.

If your Campaign system tables are configured for Unicode, find the appropriate script in the ddl/unicode directory under your eMessage installation.

If your Campaign system tables are not configured for Unicode, use the non-Unicode scripts in the ddl directory under your eMessage installation.

Data source type	Script name
IBM DB2	ace_op_systab_db2.sql The user tablespace and system temporary tablespace where the system tables reside must each have a page size of 16K or greater.
Microsoft SQL Server	ace_op_systab_sqlsvr.sql
Oracle	ace_op_systab_ora.sql

Scripts for populating eMessage tables

IBM provides the ace_op_populate_systab scripts for populating the eMessage tables in your local environment.

Script locations

Locate the populate scripts in the ddl directory of your eMessage installation. IBM provides only one version of the populate scripts because you can use them for either Unicode or non-Unicode tables.

Note: The eMessage installation directory is a subfolder within the Campaign directory.

Data source type	Script name
IBM DB2	ace_op_populate_systab_db2.sql
Microsoft SQL Server	ace_op_populate_systab_sqlsvr.sql
Oracle	ace_op_populate_systab_ora.sql

Step: Register Campaign manually, if necessary

If the Campaign 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 Campaign information into the Marketing Platform system tables manually.

The utilities mentioned in this procedure are located in the `tools/bin` directory under your Marketing Platform installation. For detailed instructions on using the utilities, see the following.

- “The `configTool` utility” on page 83
 - “The `populateDb` utility” on page 91
1. Run the `populateDb` utility, using the following example command as a guideline. This imports security roles and permissions into the default partition.


```
populateDb.bat -n Campaign
```

2. 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 -r Campaign -f "full_path_to_Campaign_installation_directory\conf\campaign_configuration.xml"
```

```
configTool -v -i -p "Affinium|suite|uiNavigation|mainMenu" -f "full_path_to_Campaign_installation_directory\conf\campaign_navigation.xml"
```

```
configTool -v -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "full_path_to_Campaign_installation_directory\conf\campaign_setup_navigation.xml"
```

```
configTool -v -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "full_path_to_Campaign_installation_directory\conf\campaign_analysis_navigation.xml"
```

```
configTool -v -i -p "Affinium|suite|uiNavigation|alerts" -f "full_path_to_Campaign_installation_directory\conf\campaign_alerts.xml"
```

Register eMessage manually, if necessary

By default, the Campaign installer automatically registers eMessage with the IBM Unica Marketing Platform, but does not enable it. In some situations, the Campaign installer does not connect with the Marketing Platform system tables to automatically register eMessage.

If the installer does not register eMessage automatically, you must register eMessage manually with the `configTool` utility provided with the IBM Unica Marketing installation. The `configTool` is in the `tools\bin` directory under your Marketing Platform installation.

To register eMessage manually, run the `configTool` utility as follows.

```
configTool -r eMessage -f "full_path_to_eMessage_installation_directory\
conf\emessage_configuration.xml"
```

Note: The eMessage installation directory is a subdirectory of the Campaign installation directory.

For more information about registering and configuring eMessage, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Step: Set data source variables in the Campaign startup script (UNIX only)

During Campaign installation, the IBM Unica Installer collects database information from you and uses that information to automatically configure the database and environment variables required to create and use the Campaign system tables. Those settings are stored in the `setenv.sh` file in the `bin` directory under your Campaign server installation.

For access to data sources (such as Campaign customer tables) that do not use the same type of database as the system tables, you must manually configure the `setenv.sh` file to add the database and library environment variables described in "Database and library environment variables (UNIX)."

Note that if you modify this file when the Campaign server is already running, you must restart the server before changes to the `setenv` file are recognized. See "Start the Campaign server" on page 33 for more details.

Refer to the "IBM Unica Campaign database information checklist" on page 11 for the required information to add to the `setenv` file.

Database and library environment variables (UNIX)

Set database and library environment variables required for your databases (customer tables and, if you chose Manual Database Setup during installation, the system tables) and operating system in the `setenv.sh` file as described in the following tables.

Database environment variables

Database	Syntax and Description
DB2	<pre>DB2DIR=full_dir_path export DB2DIR DB2 installation directory (for example, /usr/lpp/db2_06_01). . full_path_to_db2profile</pre> <p>Sources the database configuration for DB2 users (e.g./home/db2inst1/sqllib/db2profile).</p> <p>Note the ". " (period and then a space).</p>

Database	Syntax and Description
Netezza	<p>NZ_ODBC_INI_PATH=<i>full_dir_path</i></p> <p>export NZ_ODBC_INI_PATH</p> <p>Directory location of the odbci.ini file (e.g. /opt/odbc64v51)</p> <p>ODBCINI=<i>full_path_and_file_name</i></p> <p>export ODBCINI</p> <p>Full path to the odbc.ini file</p>
Oracle	<p>ORACLE_BASE=<i>full_dir_path</i></p> <p>export ORACLE_BASE</p> <p>Oracle installation directory</p> <p>ORACLE_HOME=<i>full_dir_path</i></p> <p>export ORACLE_HOME</p> <p>Oracle's home directory (e.g. /home/oracle/OraHome1).</p>
Teradata	<p>ODBCINI=<i>full_path_and_file_name</i></p> <p>export ODBCINI</p> <p>Full path to the obdc.ini file</p>

Library environment variable

Define the library environment variable as follows, depending on your UNIX operating system.

Operating System	Value
SunOS and Linux	<p>LD_LIBRARY_PATH</p> <p>For example:</p> <p>LD_LIBRARY_PATH=<Campaign_Home>/bin:<path to DB lib directory>:\$LD_LIBRARY_PATH</p> <p>export LD_LIBRARY_PATH</p> <p>Note: If LD_LIBRARY_PATH_64 (for 64-bit linking) is set, remove it. The LD_LIBRARY_PATH variable will be ignored if LD_LIBRARY_PATH_64 is set.</p>
AIX	<p>LIBPATH</p> <p>For example: LIBPATH=<Campaign_Home>/bin:<path to DB lib directory>:/usr/lib:\$ORACLE_HOME/lib32:\$ORACLE_HOME/lib</p>
HP-UX	<p>SHLIB_PATH</p> <p>For example: SHLIB_PATH=<Campaign_Home>/bin:<path to DB lib directory>:/usr/lib:\$ORACLE_HOME/lib32:\$ORACLE_HOME/lib</p>

Library directories for Oracle databases

Different versions of Oracle have different naming conventions for their `lib` directories. Older versions used `lib` for 32-bit and `lib64` for 64-bit. Newer versions use `lib32` for 32-bit and `lib` for 64-bit.

If you install 32-bit Campaign, you must include either `$ORACLE_HOME/lib32` or `$ORACLE_HOME/lib` — whichever one contains the 32-bit Oracle libraries.

If you install 64-bit Campaign, you must include either `$ORACLE_HOME/lib` or `$ORACLE_HOME/lib64` — whichever one contains the 64-bit Oracle libraries.

Note: Do not include paths to both the 32- and 64-bit libraries; include only the path to the library you are using for your version of Campaign.

Chapter 5. Deploying the Campaign web application

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

When you ran the IBM installer, you may have included Campaign in an EAR file, or you may choose to deploy the Campaign WAR file. If you included the 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.

Change the web application session timeout (optional)

The session timeout determines how long an inactive HTTP session can remain open before it expires.

Set the session timeout on your web application server:

- WebSphere: Use the IBM WebSphere Application Server Administrative Console to set the Session timeout in minutes. You can adjust this setting at the server and Enterprise Application levels. See your WebSphere documentation for details.
- WebLogic: Use the WebLogic console to set the Session Timeout in seconds, or adjust the **TimeoutSecs** parameter value for the **session-descriptor** element in the weblogic.xml file.

Deploying IBM Unica Campaign on WebSphere Application Server

You can deploy IBM Unica Campaign on supported versions of WebSphere Application Server from a WAR file or EAR file.

Before you begin

Follow the appropriate instructions depending on whether you are deploying IBM Unica Campaign from a single WAR file or as a module within an EAR file. If you need additional information about WebSphere Application Server, see the following links:

- For WebSphere Application Server version 8, see Welcome to the WebSphere Application Server information center.
- For WebSphere Application Server version 7, see the WebSphere Application Server Version 7.0 Information Center.

To deploy IBM Unica Campaign on WebSphere Application Server from a WAR file

Follow this procedure to deploy the IBM Unica Campaign application from a WAR file (not an EAR file) onto WebSphere Application Server.

Before you deploy IBM Unica Campaign:

- Confirm that your version of WebSphere meets the requirements in the *Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- Confirm that you created the data sources and database provider in WebSphere. See Chapter 2, “Preparing data sources for Campaign,” on page 7.

To deploy the IBM Unica Campaign application WAR file on WebSphere Application Server, complete the following steps.

1. If your system tables are in DB2, go to the Custom Properties for the data source. Set the value for **resultSetHoldability** to **1**.
If you do not see a field named **resultSetHoldability**, add a custom property with that name and set its value to **1**.
2. Follow the guidelines below to deploy the IBM Unica WAR file as an enterprise application.
Unless otherwise noted, you can accept the default settings.
 - 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** or **Install New Application** wizard runs.
 - In step 1 of the installation wizard, select **Precompile JavaServer Pages files**.
 - In step 3 of the installation wizard, set the **JDK Source Level** to 16. If 16 is not available, select 15.
 - In step 8 of the installation wizard, set the **Context Root** to **/Campaign**.
3. In the server's **Web Container Settings > Session Management** section, enable cookies.
4. If you are using version 8 of WebSphere Application Server, choose **Servers > WebSphere application server > server 1 > Session management > Cookies** and clear the check box for **Set session cookies to HTTPOnly to help prevent cross-site scripting attacks**.
5. In the WebSphere console, open the server's **Applications > Enterprise Applications > Unica.war > Session Management > Enable Cookies > Cookie Name** section, and specify a unique session cookie name.
6. Select the **Override session management** check box in Session Management.
7. In the server's **Applications > Enterprise Applications** section, select the WAR file that you deployed, then select **Class loading and update detection** and set the following **General Properties** on the **Configuration** tab:
 - For **Class loader order**, select **Classes loaded with local class loader first (parent last)**.
 - For **WAR class loader policy**, select **Single class loader for application**.
8. Start your deployment.

To deploy IBM Unica Campaign on WebSphere Application Server from an EAR file

Follow this procedure to deploy the IBM Unica Campaign application on WebSphere Application Server when Campaign is a module (.war file) within an EAR file.

These instructions pertain if you included IBM Unica Campaign in an EAR file when you ran the IBM Unica Marketing installer. If you are deploying an EAR file, you must follow all of the deployment guidelines detailed in the individual installation guides for the products included in the EAR file.

Before you deploy IBM Unica Campaign:

- Confirm that your version of WebSphere meets the requirements in the *Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- Confirm that you created the data sources and database provider in WebSphere. See Chapter 2, “Preparing data sources for Campaign,” on page 7.

To deploy IBM Unica Campaign from an EAR file onto WebSphere Application Server, complete the following steps.

1. If your system tables are in DB2, go to the Custom Properties for the data source. Set the value for **resultSetHoldability** to 1.
If you do not see a field named **resultSetHoldability**, add a custom property with that name and set its value to 1.
2. Follow the guidelines below to deploy the IBM Unica EAR file as an enterprise application.
Unless otherwise noted, you can accept the default settings.
 - In the form where you browse to and select the EAR file, select **Show me all installation options and parameters** to start the **Select Installation Options** or **Install New Application** wizard.
 - In step 1 of the installation wizard, select **Precompile JavaServer Pages files**.
 - In step 3 of the installation wizard, set the **JDK Source Level** to 16. If 16 is not available, select 15. Be sure to set the **JDK Source Level** for each web module (.war file).
 - In step 10 of the installation wizard, confirm that the **Context Root** value is set to /Campaign. The correct Context Root values are supplied for you in the wizard. For example, unica.war is set to /unica and Campaign.war is set to /Campaign.
3. In the server's **Web Container Settings > Session Management** section, enable cookies.
4. If you are using version 8 of WebSphere Application Server, choose **Servers > WebSphere application server > server 1 > Session management > Cookies** and clear the check box for **Set session cookies to HTTPOnly to help prevent cross-site scripting attacks**.
5. In the WebSphere console, open the server's **Applications > Enterprise Applications > UnicaApp > Module Management > [deployed_module] > Session Management > Enable Cookies > Cookie Name** section, and specify a unique session cookie name.
6. Select the **Override session management** check box in Session Management.
7. In the server's **Applications > Enterprise Applications** section, select the EAR file that you deployed, select **Class loading and update detection** and set the following General Properties on the **Configuration** tab:
 - **Class loader order**: Select **Classes loaded with local class loader first (parent last)**.
 - **WAR class loader policy**: Select **Single class loader for application**.
8. Specify the following settings for the Campaign.war module that is in the EAR file that you deployed:
 - a. Go to **Enterprise Applications** and select the EAR file (**UnicaApp**).
 - b. On the **Manage Modules** page, select the **Campaign.war** file.
 - c. On the **Enterprise Applications > EAR > Manage Modules > WAR** page:
 - Set **Starting weight** to 10000.

- Set **Class loader order** to **Classes loaded with local class loader first (parent last)**.
 - d. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session management** page, select **Enable cookies**.
 - e. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session management > Cookies** page:
 - Set the **Cookie name** to **CMPJSESSIONID**.
 - For the **Cookie maximum age**, select **Current browser session**.
 - f. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session management** page
 - Select **Allow overflow**.
 - For **Maximum in-memory sessions**, enter **1000**.
 - For **Session timeout**, select **Set timeout** and enter **30**.
 - g. Define the same settings for each of the other .war files that you want to deploy from the EAR file.
9. Start your deployment.

Deploying IBM Unica Campaign on WebLogic

Follow the guidelines in this section when deploying IBM Unica Marketing products on WebLogic.

All versions of WebLogic, all IBM Unica Marketing products

- 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 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 Unica 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.
- If deploying in a production environment, set the JVM memory heap size parameters to 1024 by adding the following line to the `setDomainEnv` script: `Set MEM_ARGS=-Xms1024m -Xmx1024m -XX:MaxPermSize=256m`

Additional guidelines for WebLogic 10gR3 only

Note: If you use WebLogic 10gR3, you must apply Oracle patches for CR303287 and CR310307. The patch for WebLogic 10.3 is equivalent to CR303287 and CR310307.

If you are deploying Campaign in a different JVM from the Marketing Platform, perform this procedure in the WebLogic 10 domain where you plan to deploy Campaign.

1. Start WebLogic and the WebLogic console.
2. Edit your domain so that the **Archived Real Path Enabled** box on the Web Applications tab is checked.

Additional steps for WebLogic 11g

For WebLogic 11g, make the following changes to the campaign.war file:

1. Unwar the campaign.war file, and locate the weblogic.xml file in the WEB_INF directory.
2. Open weblogic.xml in a text editor and add the following line:
<cookie-http-only>>false</cookie-http-only> in the session-descriptor section of the file.

For example, your finished session-descriptor section should look similar to this:

```
<session-descriptor>
  <session-param>
    <param-name>CookieName</param-name>
    <param-value>CAMPAIGNSESSIONID</param-value>
  </session-param>
  <cookie-http-only>>false</cookie-http-only>
</session-descriptor>
```

3. Save the weblogic.xml file.
4. ONLY if you also use AIX 6.1 with WL11g, remove the xercesImpl.jar file from the unpackaged WEB_INF/lib directory.
5. Build war campaign.war to include the changes you made before deploying it.

Reports on UNIX systems for all versions of WebLogic

If you have installed Campaign with IBM Unica Optimize on a UNIX system, you must enable the java.awt.headless JVM property for your WebLogic web application server to be able to display the graphs in Optimize reports.

To enable graph display in Optimize reports in the WebLogic JVM:

1. Shut down the WebLogic server if it is already running.
2. Locate and open the startup script for your WebLogic server (startWebLogic.sh) in any text editor.
3. Modify the JAVA_OPTIONS parameter to add the following value:
-Djava.awt.headless=true
4. Save the startup script, then restart the WebLogic server.

Start the Campaign server

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

Note: The Marketing Platform and Campaign web application must be deployed and running when you start the Campaign server.

To start the Campaign server directly

Follow the instructions appropriate for your operating system.

Windows

Start the Campaign server by running the `cmpServer.bat` file located in the `bin` directory under your Campaign installation. When the `unica_aclsnr.exe` process appears on the Windows Task Manager Processes tab, the server has started successfully.

UNIX

Start the Campaign server by executing the `rc.unica_ac` program with a `start` argument. You must run this command as root. For example:

```
./rc.unica_ac start
```

To determine whether the `unica_aclsnr` process has started successfully, enter this command:

```
ps -ef | grep unica_aclsnr
```

To determine the process ID for the server you started, view the `unica_aclsnr.pid` file located in the `conf` directory under your Campaign installation.

To install the Campaign server as a Windows service

To install the Campaign server as a Windows service that starts automatically whenever the Windows system starts:

1. Add the `bin` directory under the Campaign installation directory to the user `PATH` environment variable. If the `PATH` environment variable does not exist for the user, create it.

Make sure that you add this path to the user `PATH` variable, not the system `PATH` variable.

If the Campaign `bin` directory exists in the system `PATH` environment variable, remove it. You do not need it in the system `PATH` environment variable to install the Campaign server as a service.

2. If you are upgrading from a previous version of Campaign that had the server installed as a service, stop the service.
3. Open a command window and change directories to the `bin` directory under your Campaign installation.
4. Run the following command to create the Campaign server service:
`unica_aclsnr -i`

The service is created.

Note: Make sure `CAMPAIGN_HOME` has been created as a system environment variable before starting the Campaign server service.

Chapter 6. Configuring Campaign after deployment

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

In addition, if you are using the IBM Unica Marketing reporting feature, you must perform the tasks described in the *IBM Unica Marketing Platform Installation Guide*.

Note: If you plan to enable IBM Unica eMessage for hosted email, you must use the IBM Unica Marketing reporting feature to view standard eMessage performance reports.

Step: Verify the Campaign listener is running

The Campaign listener must be running before users can work with any Campaign features. The listener automatically creates a separate `unica_acsvr` process for each login and each active flowchart. For example, if one user logs in and then opens a flowchart, the listener creates two instances of `unica_acsvr.exe`.

Use the following procedure to verify that the Campaign listener is running.

1. Use the appropriate procedure for your operating system:

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

In UNIX, use the `ps` command to look for the Campaign server, as in the following example: `ps -ef | grep unica_aclsnr`.

2. If the listener is not running, restart it:

In Windows, run the `cmpServer.bat` script that is in the `bin` directory under your Campaign installation.

In UNIX, enter the following command at the system prompt: **`rc.unica_ac start`**

For important details about running the listener, including how to start it automatically, see the *IBM Campaign Administrator's Guide*.

Step: Set up the Campaign system user

A system user is a IBM Unica Marketing user account that is configured for use by IBM Unica applications.

To avoid presenting users with repeated prompts for login credentials you can associate a system user with one or more data sources. Each data source specifies a user name and password. This allows you to provide a user name and password to access a database or other protected resource by referencing the data source. By adding multiple data sources to the configuration of the system user account, you can allow the system user to access multiple databases.

In Campaign, the system user holds login credentials for accessing system tables and other data sources.

Use an existing or new IBM Unica Marketing user account to save credentials for the data sources described here.

You set up IBM Unica Marketing users and assign user data sources in the **Settings > Users** area of IBM Unica Marketing. See the online help in that section for instructions on how to do this.

Set up a user account to hold credentials for the following data sources.

- Campaign system tables (UA_SYSTEM_TABLES)
- All customer (user) tables

On UNIX, for the **Alternate Login** attribute of the system user, enter the UNIX account of a user in a group that shares privileges with the UNIX users of Campaign.

Note: If you have multiple partitions, each partition must have its own system user. The system user cannot be the same across partitions.

Step: Add data source properties on the Configuration page

You must add data source configuration properties to the Configuration page for each Campaign data source, using the appropriate data source template. The Campaign installer imports the template for the database type that you specified for the Marketing Platform database when you ran the IBM Unica installer.

If you need other data source templates for additional database types, you must import them manually using the Marketing Platform configTool utility. You can import as many templates as you need, to correspond to each different type of database you have.

For example, suppose your installation of Marketing Platform and Campaign used the following databases:

- Oracle - system tables
- DB2 - customer (user) tables
- DB2 - additional customer (user) tables

In this case, you would import the DB2Template.xml template for the two sets of customer (user) tables.

If your Marketing Platform and Campaign system tables databases are of the same database type, the installer automatically imports the template used for the system tables; in this example, it imports the Oracle template.

For instructions, see “To import data source templates” on page 37.

You create a new category from the template, which creates a new set of data source configuration properties. Create as many new categories as needed, one for each data source of that type. In the example above, you would use the Oracle template to create one new category and the DB2 template to create two new categories. See “To duplicate a data source template” on page 37.

After you add the data source properties, set the data source configuration properties in the categories you created from the templates.

For instructions, see “Step: Set data source properties” on page 37.

To import data source templates

The Campaign data source templates are located in the conf directory under your Campaign installation.

Note: Database types supported for user tables include several types not supported for Campaign system tables. The Campaign system tables data source (UA_SYSTEM_TABLES) is supported only on Oracle, DB2 and SQLServer.

To import and export templates, you use the Marketing Platform configTool utility, located in the tools/bin directory under your Marketing Platform installation. If you are not familiar with configTool, see “The configTool utility” on page 83 for details on performing this task.

Here is an example of the command you would use to import the Oracle template into the default partition (Windows environment).

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

To duplicate a data source template

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

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

2. Click the data source template.

The Create category from Template page displays.

3. Enter a name in the **New category name** field (required).

Note: The data source category name for Campaign’s system tables **MUST** be UA_SYSTEM_TABLES.

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.

In the next step, you will set the properties as described in “Step: Set data source properties”

Steps: Set required Campaign properties on the Configuration page

This section describes the minimum configuration properties you must set on the Configuration page for a basic installation of Campaign. Set these required properties as described in this section.

Campaign also has properties on the Configuration page that perform important functions that you can optionally adjust.

Step: Set data source properties

You must set the properties listed in this section for each Campaign data source. These data sources are the Campaign system table database and any customer (user) databases you plan to use with Campaign.

Note: The data source category name for Campaign's system tables **must** be `UA_SYSTEM_TABLES`.

For details on setting the values, see the context help for these properties or the *IBM Unica Marketing Platform Administrator's Guide*.

- `ASMUserForDBCredentials`. This property must be the same user you already created as the Campaign system user in "Step: Set up the Campaign system user" on page 35.
- `DSN`. For SQL server, set this property to the DSN (data source name) you created. For Oracle and DB2, set this property to the database name or the SID (service) name.
- `JndiName`. Set this property to the JNDI you created in your application server to connect to this specific data source.
- `SystemTableSchema`. Not required for SQL server. For other data sources, set this property to the user of the database to which you are trying to connect.
- `OwnerForTableDisplay`. Not required for SQL server. For other data sources, set this property to the user of the database to which you are trying to connect.

Step: Set additional properties

In addition to creating and setting data source properties, you must set the following properties on the Configuration page for a basic installation of Campaign.

- Campaign > unicaACLlistener > serverHost
- Campaign > unicaACLlistener > serverPort
- For the default partition, set values as desired in the categories under Campaign > partitions > partition1.

Note that any time you change either of these two properties, you must restart the Campaign listener before the changes will take effect.

Step: Map user tables in Campaign

Mapping user tables is the process of making external data sources accessible in Campaign. A typical user table contains information about your company's customers, prospects, or products. The data source can be a database table or ASCII flat file. You must map any data sources that you configured to make that data accessible to processes in flowcharts.

For instructions on how to map user tables, see the *Campaign Administrator's Guide*.

Note: User tables are different from system tables. Most Campaign system tables are mapped automatically during initial installation and configuration if you use the system table data source name `UA_SYSTEM_TABLES`. If a connection issue forces you to map system tables manually, you must log out of Campaign and log in again after you map the tables.

Step: Verify the Campaign installation

If you prepared your data sources, installed and configured Campaign, deployed the web application, and configured Campaign after deployment, you are ready to verify your installation.

If you have not already done so, log in to IBM Unica Marketing as a user that exists in the Campaign Administrators role (such as asm_admin). In **Settings > Users**, assign at least one security role (for example, Global Policy/Admin) to the new user. After the new user is assigned the role, you can log in to Campaign as that new user.

Use the following procedure to verify the installation.

1. Log in to IBM Unica Marketing.
2. Verify that all system tables exist in the **Settings > Campaign Settings > Manage Table Mappings** window.
3. Create a campaign and create a flowchart in that campaign.

Step: Perform optional configurations for integration with IBM applications

IBM Unica Campaign integrates with various IBM applications. This section describes the configurations and processes required to establish the integration.

Step: Set properties for integration with IBM Unica Marketing Operations

If you are integrating Campaign with Marketing Operations, set the Campaign > partitions > partition[n] > server > internal > MO_UC_integration property to **Yes**.

Also adjust the following properties: MO_UC_BottomUpTargetCells, IBM Marketing Operations - Offer integration, and UC_CM_integration. For more information, see the *IBM Unica Marketing Operations and Campaign Integration Guide*.

To enable access to campaigns created in Affinium Campaign 7.x and linked to Affinium Plan 7.x projects (i.e., legacy campaigns), set the Campaign > partitions > partition1 > server > internal > Legacy_campaigns property to **Yes**.

If your Campaign installation has multiple partitions, set these properties in each partition where you want to enable integration.

Step: Begin the startup process to integrate with eMessage

IBM Unica eMessage integrates with Campaign so that you can use the information in your marketing database to create, transmit, and track individually personalized marketing email messages to your customers and prospects. IBM hosts the required email transmission and tracking resources. You manage your customer records locally with Campaign.

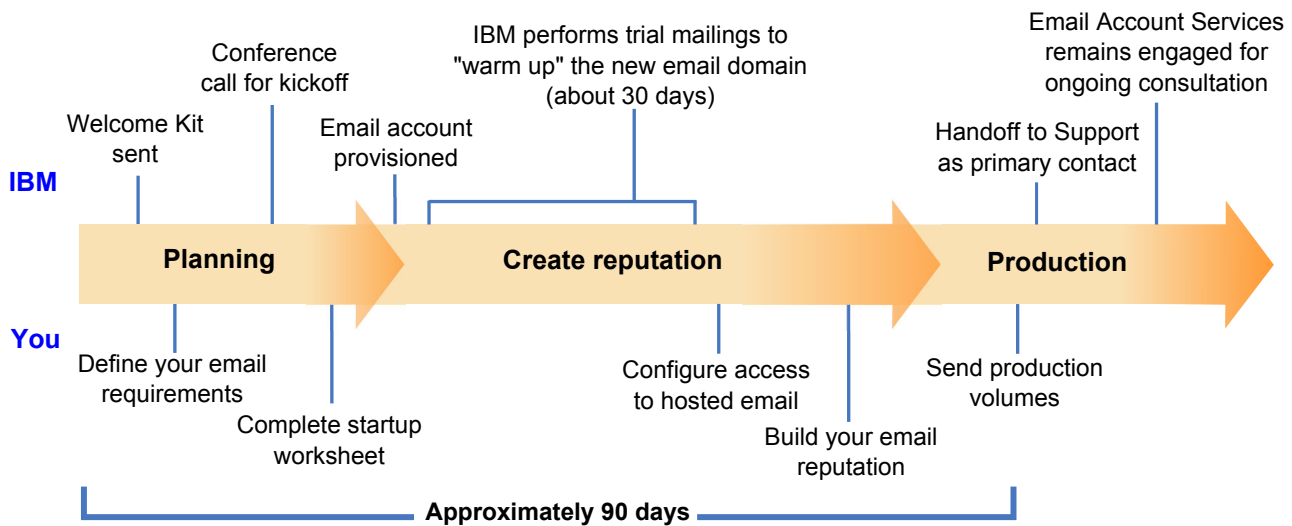
If you are integrating your Campaign installation with eMessage, you must contact IBM to establish a hosted email account and configure a connection to IBM Unica Hosted Services. IBM works with you during the startup process that provisions the hosted email account and establishes your email marketing reputation among leading Internet Service Providers. During the startup process, you must make configuration changes in IBM Unica Marketing Platform and Campaign. For more information about the hosted email startup process and the configurations that you must perform, see “Integration of eMessage with Campaign” on page 5 and the *IBM Unica eMessage Startup and Administrator’s Guide*.

Overall view of the eMessage startup process

You can activate email features in IBM Unica Campaign to conduct highly targeted and trackable email marketing campaigns. Campaign uses email functions provided by IBM Unica eMessage through resources hosted in data centers in the US and United Kingdom. An account to access these resources is included with your eMessage subscription.

IBM begins the startup process after it creates your hosted email account. IBM helps you to become familiar with eMessage, to connect to hosted email resources, and to establish your reputation as a legitimate email marketer among leading Internet Service Providers (ISPs).

The process proceeds in three phases. The IBM Unica Professional Services and Email Account Services teams guide you along the way.



The Professional Services consultant is your primary point of contact with IBM during the startup process. When the account startup process completes, the Professional Services consultant transfers primary support responsibility to the IBM Unica Product Support team.

A dedicated Email Account Services (EAS) consultant provides special assistance for email-related issues. Creating a favorable email reputation among major Internet Service Providers (ISPs) is critical to ensuring that your email marketing campaigns consistently reach their target recipients. When you start to run mailings, the EAS consultant reviews the mailing deliverability performance and suggests the best ways to gradually build your email reputation.

Chapter 7. Configuring multiple partitions in Campaign

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. There is 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.

Partition benefits

Multiple partitions are useful for setting up strong security between groups of users, as each partition has its own set of Campaign system tables. Multiple partitions are not recommended when groups of users must share data.

Each partition has its own set of configuration settings, so Campaign can be customized for each group of users. However, all partitions share the same installation binaries. This minimizes installation and upgrading efforts, compared with performing multiple separate installations.

Partition user assignment

Access to partitions is managed through membership in Marketing Platform groups. To make a user a member of a partition, you make that user a member of a group that is assigned to that partition.

With the exception of the partition superuser, each IBM user can belong to only one partition. A user who requires access to multiple partitions must have a separate IBM user account for each partition.

If there is only one Campaign partition, users do not have to be explicitly assigned to that partition to have access to Campaign.

Partition superuser

To administer security across all users of Marketing Platform, a user account must exist that has access to all security settings and user accounts in the system.

By default, this user account is `platform_admin`. This user account does not belong to any one partition; instead, it has access to all user accounts in all partitions.

The IBM Unica administrator can create additional users with the same level of access. To be a partition superuser, an account must have Admin access to the Marketing Platform and have full access to the Users, User Groups, and User Permissions pages. The partition superuser does not require access to product-specific security pages, such as Campaign security pages.

Partition data access

In a multi-partition configuration, partitions have the following security characteristics.

- A user cannot access any partition without being a member of a group that is assigned to a partition.
- A user of one partition cannot view or change data in any other partition.
- From browse dialog boxes in Campaign, users cannot navigate the file system above the root directory of their partition. For example, if two partitions, named `partition1` and `partition2`, exist, and you belong to the group associated with `partition1`, you cannot navigate the directory structure for `partition2` from a dialog box.

Setting up multiple partitions

This section describes the tasks you must perform to configure additional partitions in Campaign.

Prerequisites for configuring multiple partitions

Before you configure additional partitions in Campaign, complete the following tasks for each partition that you are configuring:

- “Step: Create the database or schema for the Campaign system tables” on page 7
- “Step: Create the ODBC or native connections on the Campaign machine” on page 7
- “Step: Create the JDBC connections in the web application server” on page 9

Prepare data sources for partitions

Create the system tables database and any other data sources required for your partitions. Then configure the JDBC and ODBC or native connections required to access your data sources. For information on preparing the data sources, see Chapter 2, “Preparing data sources for Campaign,” on page 7.

Create and populate the system tables for partitions

For each partition, create a different schema in your database to hold the system tables.

Use the database-specific scripts packaged with Campaign to create and populate the system tables.

Create a directory structure for each additional partition

This procedure provides instructions for creating partition directories in your file system.

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

1. In the `partitions` directory under your Campaign installation, create a duplicate of the default `partition1` directory for each partition that you are adding, ensuring that you include all subdirectories.
2. Name each partition directory with a unique name. Use these exact same names for the partitions when you later create their configuration trees on the Configurations page.

For example, if you want to create a second partition and created the directory named Campaign/partitions/partition2, when you create the configuration tree on the Configurations page, you must use the name “partition2” to identify this partition.

3. Delete any files that exist in the duplicate partition subdirectories.

To clone the default partition

The following procedure describes how to use the partitionTool utility with the -s option. If you decide not to use this option, you must stop the web application server where Marketing Platform is deployed before performing this procedure.

1. Set the JAVA_HOME environment variable, either in the setenv script located in the tools/bin directory of your Marketing Platform installation, or in the command line window in which you run the partitionTool utility.
2. Open a command line window and run the utility from the tools/bin directory under your Marketing Platform installation. Use the appropriate command and options (as described in the *Marketing Platform Administrator's Guide*) to achieve your desired results.

For example:

```
partitionTool -c -s partition1 -n partition2
```

3. Repeat this procedure for each new partition you need to create.
4. When you are finished, stop and restart the application server where Marketing Platform is deployed to see the groups that were created.

For complete information on using this utility, see “The partitionTool utility” on page 89.

Create new partition structures

For each new partition, create the partition structure on the Configuration page using the New partitionTemplate.

1. On the Configuration page, navigate to Campaign > partitions and click (*partitionTemplate*).

Note that if you do not see the (*partitionTemplate*) property in the list, use the configTool utility to import the partition template, using a command similar to the following:

```
configTool -i -p "Affinium|Campaign|partitions"  
-f <CAMPAIGN_HOME>/conf/partitionTemplate.xml
```

Replace <CAMPAIGN_HOME> with the actual path to your Campaign installation.

The configTool utility is found in the tools directory under your IBM Unica Marketing Platform installation. See the *IBM Unica Marketing Platform Administrator's Guide* for information on using this utility.

In the right pane, you see the partitionTemplate pane with an empty **New category name** field.

2. Enter the name for the new partition, using the same name that you used when creating the partition's directory structure in the file system in “Create a directory structure for each additional partition” on page 42.
3. Click **Save Changes**.

You see the new partition structure, with the same categories and properties as in the partition template.

Configure data source properties for partitions

For each partition you create, you must configure its data source properties on the Configuration page.

Step: Add data source properties on the Configuration page

You must add data source configuration properties to the Configuration page for each Campaign data source, using the appropriate data source template. The Campaign installer imports the template for the database type that you specified for the Marketing Platform database when you ran the IBM Unica installer.

If you need other data source templates for additional database types, you must import them manually using the Marketing Platform `configTool` utility. You can import as many templates as you need, to correspond to each different type of database you have.

For example, suppose your installation of Marketing Platform and Campaign used the following databases:

- Oracle - system tables
- DB2 - customer (user) tables
- DB2 - additional customer (user) tables

In this case, you would import the `DB2Template.xml` template for the two sets of customer (user) tables.

If your Marketing Platform and Campaign system tables databases are of the same database type, the installer automatically imports the template used for the system tables; in this example, it imports the Oracle template.

For instructions, see “To import data source templates” on page 37.

You create a new category from the template, which creates a new set of data source configuration properties. Create as many new categories as needed, one for each data source of that type. In the example above, you would use the Oracle template to create one new category and the DB2 template to create two new categories. See “To duplicate a data source template” on page 37.

After you add the data source properties, set the data source configuration properties in the categories you created from the templates.

For instructions, see “Step: Set data source properties” on page 37.

Step: Set data source properties

You must set the properties listed in this section for each Campaign data source. These data sources are the Campaign system table database and any customer (user) databases you plan to use with Campaign.

Note: The data source category name for Campaign’s system tables **must** be `UA_SYSTEM_TABLES`.

For details on setting the values, see the context help for these properties or the *IBM Unica Marketing Platform Administrator’s Guide*.

- `ASMUserForDBCredentials`. This property must be the same user you already created as the Campaign system user in “Step: Set up the Campaign system user” on page 35.

- **DSN.** For SQL server, set this property to the DSN (data source name) you created. For Oracle and DB2, set this property to the database name or the SID (service) name.
- **JndiName.** Set this property to the JNDI you created in your application server to connect to this specific data source.
- **SystemTableSchema.** Not required for SQL server. For other data sources, set this property to the user of the database to which you are trying to connect.
- **OwnerForTableDisplay.** Not required for SQL server. For other data sources, set this property to the user of the database to which you are trying to connect.

Set up system users

A system user is a IBM Unica Marketing user account that is configured for use by IBM Unica Marketing applications. IBM Unica Marketing applications may require a system user account configured with the following attributes.

- Login credentials for accessing system tables or other data sources.
- Specific permissions to create, modify, and delete objects within the system.

To avoid presenting users with repeated prompts for login credentials you can associate a system user with one or more Marketing Platform data sources. Each data source specifies a user name and password. This allows you to provide a user name and password to access a database or other protected resource by referencing the data source. By adding multiple data sources to the configuration of the system user account, you can allow the system user to access multiple databases.

Use the information in this section to set up system users for your IBM Unica Marketing application.

For general instructions on setting up a new user and assigning a data source to a user, see the *IBM Unica Marketing Platform Administrator's Guide*.

Campaign system user

Use an existing or new user account to save credentials for the following data sources.

- Campaign system tables
- All customer (user) tables

On UNIX, for the **Alternate Login** attribute of the system user, enter the UNIX name for a user in a group that shares privileges with the UNIX users of Campaign.

Note: If you have multiple partitions, each partition must have its own system user. The system user cannot be the same across partitions.

Configuring the IBM Cognos Reports for multiple partitions

If you are using Campaign, eMessage, and/or Interact with more than one partition, you must configure IBM Cognos reports packages for each partition. A utility, `partition_tool.sh`, is provided to help with this process.

When you run the `partition_tool.sh` utility, it does the following:

- Copies the xml files from the original reports zip archive.
- Replaces the package references in the xml files to reference a new package under a new folder that you specify.

- Zips up the new files into a new archive, adding the new partition name to the end of the file name.

After running the `partition_tool.sh` utility, you create a folder in Cognos Connection using the name you specified, and import the new archive into that folder. Finally, you copy the original project file (which contains the model) so you can change the datasource to point to the new partition, and then publish the model to the new folder.

This section describes how to configure the IBM Cognos reports for multiple partitions.

Before you begin

The reporting partition utility is a UNIX shell script named `partition_tool.sh`. Before you begin, do the following.

Determine values for input parameters

The reporting partition tool has two input parameters: the name of the partition folder and the location of the reports archive to copy.

- Decide the name you want to use for each partition's top-level report folder in Cognos. For example, "Partition2."
- Note the path to the original reports archive. For example: `IBM\Unica\ReportsPacksCampaign\cognos<version>\Unica Reports for Campaign.zip`

Windows only: obtain a shell script simulator

If IBM Cognos is running on Windows, you must download and install a shell script simulator like Cygwin and then run the script from the simulator interface.

If you do not yet have a shell script simulator installed on the machine that is running the Cognos Content Manager, download and install one now.

Ensure that a zip utility is installed

The reporting partition tool creates a zip archive for the new partition. To enable this function, a zip utility must be installed on the Cognos system.

If you do not yet have a zip utility installed on the machine that is running the Cognos Content Manager, download and install one now.

Run the reporting partition utility to create a copy of the reports archive .zip file

1. From the shell or the shell simulator, navigate to the `IBM\Unica\Platform\tools\cognos<version>\bin` directory.
2. Run the utility, providing values for the partition name and archive path. You must use quote characters around the parameter values if they contain spaces, as shown in the example below.

```
partition_tool.sh Partition2 "IBM\Unica\ReportsPacksCampaign\
cognos<version>\IBM EMM Reports for Campaign.zip"
```

3. Copy the new zip file to the Cognos deployment directory.

If you used the partition name provided in the example above, the new zip file would be named `IBM EMM Reports for Campaign_Partition2.zip`

4. Open Cognos Connection.
5. Under Public Folders, create a folder for the new reports archive.
For example, Campaign Partition2 .
6. Import the new zip archive and select the folder you created in step 5 as the target location in the import wizard.
If you followed the example, you would target the Campaign Partition2 folder.

Create a copy of the Cognos model

In this task, you create a copy of the IBM Unica Cognos data model for the new Campaign reports and ensure that the model references the correct data source name.

1. Verify that you created a IBM Cognos data source for this partition. If you have not yet created the data source for this partition, see the procedure "Create the Cognos datasource for the IBM Unica application" in the *Marketing Platform Installation Guide*.
2. Use Framework Manager to open the Campaign project (cpf file), the CampaignModel.cpf file.
3. Use **Save As** to copy the CampaignModel project and give it a new name that indicates which partition it is used for. For example, CampaignModelPartition2.
4. In the **Project Viewer**, expand the **Data Sources** node and select **CampaignDS**. (If the **Properties** pane does not appear by default, select **View > Properties**).
5. Click in the **Name** field and change the value from the default data source (CampaignDS) to the correct data source name for this Campaign partition.
6. Click in the **Content Manager Datasource** field and change the value of the default data source (CampaignDS) to the same value that you specified in the previous step.
7. Save your changes.
8. Publish the package to the content store and when the publish wizard displays the **Select Location Type** window, navigate to and specify the folder where you imported the reports archive in Cognos Connection in the previous task. That is, the "Campaign Partition 2" folder.

Update the partition's report properties on the IBM Unica Configuration page

Each partition has a set of reports properties that specifies the location of the report folders. You must edit the values of each of the reports properties to reflect the actual path of the folders by inserting the string that identifies the new top-level partition folder. If the new partition folder was named "Campaign Partition 2" in Cognos Connection, you would insert the following string to correct the path:

```
folder[@name='Campaign Partition 2']/
```

For example, to update the offerAnalysisTabCachedFolder property, you would change the value from:

```
/content/folder[@name='Affinium Campaign - Object Specific Reports']/folder[@name='offer']/folder[@name='cached']
```

to

```
/content/folder[@name='Campaign Partition 2']/folder[@name='Affinium  
Campaign - Object Specific Reports']/folder[@name='offer']/  
folder[@name='cached']
```

1. Log in to IBM Unica Marketing as the platform_admin user.
2. Select **Settings > Configuration** .
3. Expand **Campaign > partitions > *partitionName* > reports**
4. Edit the value of each of the properties in this section so they reflect the actual path to the reporting folders as described above.
5. Save your changes.
6. Repeat steps 3 through 5 for each partition.

Next steps for multiple partitions

Before you can use the partitions that you have configured for Campaign, you must complete the following administrative tasks:

- **Assign roles to each partition Admin user** — The partitionTool utility creates a default Admin user for each partition you create. On the **User Roles & Permissions** page, assign at least one security role (for example, Global Policy/Admin) to your new user. Once the new user has been assigned the role, you can log into the Campaign partition as that new user.
- **Assign a group to each partition** — Determine which groups you want to assign to each partition. For details, see the *Marketing Platform Administrator's Guide*.

If you plan to enable IBM Unica eMessage in multiple Campaign partitions, you must configure a corresponding eMessage partition for each Campaign partition. For more information about creating additional partitions for eMessage, see Chapter 8, “Configuring multiple partitions in eMessage,” on page 49.

Chapter 8. Configuring multiple partitions in eMessage

Installing eMessage creates a default partition for eMessage in the Marketing Platform. You can configure more partitions for eMessage. Each partition that you create for eMessage operates in conjunction with a partition created for Campaign.

Note: To configure multiple partitions in eMessage you must configure corresponding partitions in Campaign. Adding new partitions for eMessage requires making changes in the Marketing Platform configurations for eMessage and Campaign.

Important: After you change the eMessage and Campaign configurations, you must restart the web application server that hosts Campaign and restart the Response and Contact Tracker (RCT). You might also need to restart the Campaign listener.

Be sure to back up your existing configurations before you make changes.

Steps to create partitions for eMessage

Before you create a new partition for eMessage, confirm that you have satisfied all “Requirements for multiple partitions in eMessage” on page 50 for the partition in Campaign and eMessage. In the Marketing Platform configurations, a partition must exist for Campaign that uses the exact same name as the partition that you are adding for eMessage.

Complete the following steps to create a new partition for eMessage.

1. “Step: Create a new partition for eMessage” on page 51
2. “Step: Prepare eMessage system tables for the partition” on page 52
3. “Step: Configure partition access to IBM Unica Hosted Services” on page 54
4. “Step: Enable eMessage in Campaign for the new partition” on page 55
5. “Step: Specify the location of the RLU for the partition” on page 56
6. “Step: Restart system components” on page 56
7. “Step: Test partition configuration and connections” on page 57

About partitions for IBM Unica eMessage

Creating partitions for eMessage allows you to isolate and secure data for different groups of users. Each partition appears to users as a separate instance of eMessage, with no indication that other partitions exist on the same system. Because each partition has its own set of configuration properties, you can customize eMessage for each group of users.

Users within each partition can access only those functions, data, and customer tables configured for the partition. For example, if you create partitions named partition1 and partition2, eMessage users working in partition1 can select email recipients from customer tables configured in partition1, but not in partition2. IBM does not recommend creating multiple partitions if users need to share data.

When you work with multiple partitions, you should understand characteristics that are unique to partitions for eMessage and how partitions for eMessage relate to partitions for Campaign. You should also be familiar with the workflow for creating and configuring multiple partitions for eMessage.

Important characteristics of partitions for eMessage

Note the following when you create and configure new partitions for eMessage.

- You create partitions for eMessage differently than you do for Campaign.

You create new partitions for eMessage using a partition template available in the eMessage configuration properties in Marketing Platform.

- The name of each eMessage partition must exactly match the name of its corresponding Campaign partition.
- Each partition that you create for eMessage must be able to connect to IBM Unica Hosted Services.

You must request a separate IBM Unica Hosted Services account for each partition. IBM Unica will provide a user name and password connected to the account. You must configure a Marketing Platform data source that can provide these access credentials automatically when eMessage connects to IBM Unica Hosted Services.

For more information about how to request an account, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Relationship to partitions in Campaign

Each partition in eMessage operates in conjunction with a specific partition created in the Marketing Platform for Campaign. The Campaign partition provides the following.

- Campaign schema that contains the eMessage system tables
- File structure for Campaign in the partition, including directories used by eMessage to create and process recipient lists
- Configuration properties associated with creating recipient lists and enabling eMessage within the partition

Because eMessage operates with Campaign within a specific partition, the eMessage and Campaign partition structures must specify the same name. The partition names must match exactly.

Requirements for multiple partitions in eMessage

Before you begin to create and configure partitions for eMessage you must satisfy requirements in eMessage and Campaign.

Requirements for Campaign

To create multiple partitions in eMessage, you must complete the following tasks for Campaign.

- Create a partition in Campaign that will operate with the partition you are creating for eMessage.

Note the name of the partition.

- Create Campaign system tables in the Campaign partition.
- Configure a system user to access the system tables in the partition.

If you have multiple partitions, each partition must have its own system user. The system user cannot be the same across partitions.

Requirements for eMessage

Before you begin to create multiple partitions in eMessage, you must complete the following tasks.

- Request a IBM Unica Hosted Services account for the partition.

Each partition requires a separate account and access credentials. Contact IBM Unica Support to request an account and credentials. For more information, see the *IBM Unica eMessage Startup and Administrator's Guide*.

- Create a system user that can access the eMessage system tables that you will create in the Campaign schema for the partition.

You can update the system user that you created for the Campaign partition so that it can also access the eMessage system tables.

Step: Create a new partition for eMessage

The IBM installer registers the eMessage configuration properties and a default partition during initial installation. The default partition includes a template that you can copy to create additional partitions.

To create a new partition for eMessage, do the following.

1. Navigate to eMessage > partitions > (*partition*) and duplicate the partition template.
2. Name the new partition.

Note: eMessage does not support deleting a partition after you have created it.

Identifying the partition template

The Configuration page displays the eMessage partition template in the navigation tree for the default partition. You can identify the partition template in the tree because its label is in italics and enclosed in parentheses.

Naming the new partition

The following restrictions apply when you name a new partition.

- The name must be unique among categories that are siblings in the tree (that is, among categories that share the same parent category).
- The partition name may not start with a period. Also, the following characters are not allowed in partition names.

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

Note: Because eMessage operates with Campaign within a specific partition, the partitions for eMessage and Campaign must specify the same partition name.

Step: Prepare eMessage system tables for the partition

For each partition that you create for eMessage, you must create, populate and configure the eMessage system tables that are used by the partition in the Campaign schema.

To prepare the eMessage system tables for a partition, complete the following tasks.

1. "Create and populate eMessage tables in the partition schema"
2. "Configure automatic access to the partition's system tables" on page 54
3. "Specify the partition's system table characteristics" on page 54.

Create and populate eMessage tables in the partition schema

To create and populate the eMessage system tables for a partition, run SQL scripts against the database that contains the Campaign partition.

For more information about the SQL scripts, see the reference table for script names and locations at "Create and populate the eMessage system tables manually, if necessary" on page 24.

1. Create the eMessage system tables.
 - In your database client, run the SQL scripts for *creating* system tables against the Campaign database.
2. Populate the tables that you created.

Use the database client to run the scripts for *populating* tables against the Campaign database.

Create and populate the eMessage system tables manually, if necessary

eMessage requires that you create additional system tables in the Campaign schema and then populate them with initial data. These tables are used only by eMessage.

The Campaign installer automatically creates and populates the eMessage system tables in the Campaign schema if you select the option to create system tables automatically. However, if you do not select this option, you must create and populate the eMessage system tables manually.

Use your database client to run the appropriate script against the Campaign database. See the following tables to determine the scripts appropriate for your installation. The scripts that you must run depend on the type of database that hosts the Campaign schema and on whether the Campaign tables are configured for Unicode.

Note: The eMessage installation directory is a subfolder within the Campaign directory.

Scripts for creating eMessage tables

IBM provides the `ace_op_systab` scripts for creating the eMessage tables in your local environment.

If your Campaign system tables are configured for Unicode, find the appropriate script in the `ddl/unicode` directory under your eMessage installation.

If your Campaign system tables are not configured for Unicode, use the non-Unicode scripts in the `ddl` directory under your eMessage installation.

Data source type	Script name
IBM DB2	<code>ace_op_systab_db2.sql</code> The user tablespace and system temporary tablespace where the system tables reside must each have a page size of 16K or greater.
Microsoft SQL Server	<code>ace_op_systab_sqlsrvr.sql</code>
Oracle	<code>ace_op_systab_ora.sql</code>

Scripts for populating eMessage tables

IBM provides the `ace_op_populate_systab` scripts for populating the eMessage tables in your local environment.

Script locations

Locate the populate scripts in the `ddl` directory of your eMessage installation. IBM provides only one version of the populate scripts because you can use them for either Unicode or non-Unicode tables.

Note: The eMessage installation directory is a subfolder within the Campaign directory.

Data source type	Script name
IBM DB2	ace_op_populate_systab_db2.sql
Microsoft SQL Server	ace_op_populate_systab_sqlsvr.sql
Oracle	ace_op_populate_systab_ora.sql

Configure automatic access to the partition's system tables

eMessage accesses the partition's system tables through a system user configured in Marketing Platform. A Marketing Platform data source added to the system user provides the required access credentials. Because the eMessage system tables exist in the Campaign schema for the partition, you can use the system user that you created to access the Campaign schema to access the partition's eMessage system tables.

Set the following configuration properties in the eMessage configuration for the partition, specifying the user name and platform data source that you configured for the partition's Campaign system user.

- eMessage > partitions > partition [n] < dataSources > systemTables > asmUserForDBCredentials
- eMessage > partitions > partition [n] < dataSources > systemTables > amDataSourceForDBCredentials

Specify the partition's system table characteristics

eMessage requires information that describes the system tables for the partition. You provide this information by updating the following properties in the partition's configuration properties.

- eMessage > partitions > partition [n] < dataSources > systemTables > type
- eMessage > partitions > partition [n] < dataSources > systemTables > schemaName
- eMessage > partitions > partition [n] < dataSources > systemTables > jdbcBatchSize
- eMessage > partitions > partition [n] < dataSources > systemTables > jdbcClassName
- eMessage > partitions > partition [n] < dataSources > systemTables > jdbcURI

See the Marketing Platform online help for each property to learn more about setting the configuration properties.

For additional information about these configuration properties and configuring eMessage, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Step: Configure partition access to IBM Unica Hosted Services

IBM Unica eMessage components in the partition must be allowed to automatically provide valid login credentials when attempting to communicate with IBM Unica Hosted Services. To do this, you must add the IBM Unica Hosted Services login credentials to a Marketing Platform user. This user becomes the eMessage system user.

You can add the platform data source containing the IBM Unica Hosted Services credentials to the eMessage system user. This user can be the same system user that accesses the Campaign system tables in the partition.

The steps for configuring system users for a partition are the same as those followed during the initial eMessage installation, which created the first partition. For details about how to add IBM Unica Hosted Services login credentials to a system user, see the *IBM Unica eMessage Startup and Administrator's Guide*.

The credentials required to access IBM Unica Hosted Services are the user name and password that IBM provided during the initial startup process.

Important: For each additional partition, you must request a separate user name and password from IBM.

Configuring a system user to access IBM Unica Hosted Services

IBM Unica eMessage components must be able to communicate with IBM Unica Hosted Services without requiring manual entry of login credentials. To establish automatic login, define a system user in IBM Unica Marketing Platform that can provide the required access credentials.

To simplify user administration and troubleshooting, you can modify an existing system user to access hosted services and local system tables. You can configure a single system user to provide credentials for multiple systems. For example, modifying the configuration of the Campaign system user creates a single user that can automatically access IBM Unica Hosted Services and the eMessage system tables in the Campaign schema.

The credentials required to access IBM Unica Hosted Services are the user name and password that IBM provided during the "Overall view of the eMessage startup process" on page 40. The credentials that you use depend on whether you are connecting to IBM's US data center or the data center that IBM maintains in the United Kingdom. Consult with IBM to determine which data center you use.

For specific information about how to configure a system user to communicate with IBM Unica Hosted Services, see the *IBM Unica eMessage Startup and Administrator's Guide*.

For general information about how to create system users and data sources, see the *IBM Unica Marketing Platform Administrator's Guide*.

Step: Enable eMessage in Campaign for the new partition

To allow users of the new partition to access eMessage features in Campaign you must enable eMessage in the Campaign partition that corresponds to the new partition. For example, the eMessage mailing tab does not appear in the Campaign interface until you enable eMessage in the Campaign configuration.

You enable eMessage in the partition by updating the `eMessageInstalled` configuration property for the corresponding Campaign partition.

In the Marketing Platform configurations, navigate to **Campaign | partitions | partition[n] | server | internal** and set the `eMessageInstalled` property to **yes**.

Step: Specify the location of the RLU for the partition

For each partition where you enable eMessage, you must specify the location of the Recipient List Uploader (RLU).

During initial installation, the IBM installer automatically adds the location of the RLU to the configuration for default partition (partition1). However, when you add new partitions to your environment, you must manually configure all new partitions to reference the correct location. Because there is only one RLU for each eMessage installation, all partitions access the same plugin file in the local file system of the machine that hosts the Campaign web application.

1. In the configuration for **partition1** in your Campaign installation, navigate to Campaign > partitions > partition1 > eMessage > eMessagePluginJarFile.

The value for this property is the full path to the plugin file (emessageplugin.jar) that operates as the RLU.

For example: C:\IBM\Unica\eMessage\plugin\emessageplugin.jar

2. Copy the value for the eMessagePluginJarFile property.
3. Navigate to the eMessagePluginJarFile for the new partition and enter the path you copied from **partition1**.

All partitions must use the same location for the RLU.

Step: Restart system components

After making changes to the Campaign and eMessage configurations, you must restart the Response and Contact Tracker (RCT) and the web application server that hosts Campaign. You must also restart the Campaign listener.

Restarting the web application server for Campaign

Consult the documentation for your web application server for restart instructions.

To verify that the server has started, log in to your IBM Unica Marketing installation, access Campaign, and confirm that you can open an existing mailing.

Restarting the RCT

To restart the RCT, run scripts provided as part of the eMessage software download.

Restarting the RCT manually

To restart the RCT manually, in the bin directory under your eMessage installation, run the rct script as follows.

```
rct start
```

For more information about this script, see “The RCT script” on page 95.

Restarting the RCT as a service

To restart the RCT automatically, you must re-start the RCT service.

Note: When you re-start the RCT service, you must manually restart the RCT the first time.

Remember to restart the Campaign listener.

Step: Test partition configuration and connections

Important: Before you begin, if you have changed the Campaign or eMessage configurations, confirm that you have restarted the web application server that hosts Campaign and that you have restarted the Response and Contact Tracker.

eMessage provides scripts that you can use to verify the partition's configuration and its connection to IBM Unica Hosted Services. IBM also recommends that you confirm access to the mailing interface from the partition.

For more information on how to test the partition, see the *IBM Unica eMessage Startup and Administrator's Guide*.

Configuring the IBM Cognos Reports for multiple partitions

If you are using Campaign, eMessage, and/or Interact with more than one partition, you must configure IBM Cognos reports packages for each partition. A utility, `partition_tool.sh`, is provided to help with this process.

When you run the `partition_tool.sh` utility, it does the following:

- Copies the xml files from the original reports zip archive.
- Replaces the package references in the xml files to reference a new package under a new folder that you specify.
- Zips up the new files into a new archive, adding the new partition name to the end of the file name.

After running the `partition_tool.sh` utility, you create a folder in Cognos Connection using the name you specified, and import the new archive into that folder. Finally, you copy the original project file (which contains the model) so you can change the datasource to point to the new partition, and then publish the model to the new folder.

This section describes how to configure the IBM Cognos reports for multiple partitions.

Before you begin

The reporting partition utility is a UNIX shell script named `partition_tool.sh`. Before you begin, do the following.

Determine values for input parameters

The reporting partition tool has two input parameters: the name of the partition folder and the location of the reports archive to copy.

- Decide the name you want to use for each partition's top-level report folder in Cognos. For example, "Partition2."
- Note the path to the original reports archive. For example: `IBM\Unica\ReportsPacksCampaign\cognos<version>\Unica Reports for Campaign.zip`

Windows only: obtain a shell script simulator

If IBM Cognos is running on Windows, you must download and install a shell script simulator like Cygwin and then run the script from the simulator interface.

If you do not yet have a shell script simulator installed on the machine that is running the Cognos Content Manager, download and install one now.

Ensure that a zip utility is installed

The reporting partition tool creates a zip archive for the new partition. To enable this function, a zip utility must be installed on the Cognos system.

If you do not yet have a zip utility installed on the machine that is running the Cognos Content Manager, download and install one now.

Run the reporting partition tool to create a copy of the eMessage reports archive .zip file

1. From the shell or the shell simulator, navigate to the IBM\Unica\Platform\tools\cognos<version>\bin directory.
2. Run the utility, providing values for the partition name and archive path parameters. For example:

```
partition_tool.sh Partition2 "IBM\Unica\ReportsPackseMessage\  
cognos<version>\Unica Reports for eMessage.zip"
```

Note: You must use quote characters around the parameter values if they contain spaces, as shown above for the archive name parameter value.

3. Copy the new zip file to the Cognos deployment directory. If you used the partition name provided in the example, above, the new zip file would be named Unica Reports for eMessage_Partition2.zip
4. Open Cognos Connection.
5. Under Public Folders, determine the name of the folder created for this partition when the Campaign reports were configured for multiple partitions. If you used the example name that was suggested in the procedures for the Campaign reports, it would be "Campaign Partition 2".
6. Import the new zip archive and select the folder you identified in step 5 as the target location in the import wizard. For example, the "Campaign Partition 2" folder.

Create a copy of the Cognos model

In this task, you create a copy of the IBM Cognos data model for the new eMessage reports and ensure that the model references the correct data source name.

1. Verify that you created a IBM Cognos data source for this partition. If you have not yet created the data source for this partition, see the procedure "Create the Cognos datasource for the IBM application" in the *Marketing Platform Installation Guide*.
2. Use Framework Manager to open the eMessage project file, eMessageModel.cpf.
3. Use **Save As** to copy the eMessageModel project and give it a new name that indicates which partition it is used for. For example, eMessageModelPartition2.

4. In the **Project Viewer**, expand the **Data Sources** node and select **eMessageTrackDS**. (If the **Properties** pane does not appear by default, select **View > Properties**.)
5. Click in the **Name** field and change the value of the default data source (eMessageTrackDS) to the new data source name for this eMessage partition (for example, eMessageTrackDS_partition2).
6. Click in the **Content Manager Datasource** field and change the value of the default data source (eMessageTrackDS) to the same value that you specified in the previous step (eMessageTrackDS_partition2, in this example).
7. Save your changes.
8. Publish the package to the content store and when the publish wizard displays the **Select Location Type** window, navigate to and specify the folder where you imported the reports archive in Cognos Connection in the previous task. That is, the "Campaign Partition 2" folder.

Update the partition's report property on the IBM Unica Configuration page

Each partition has a set of reports properties that specifies the location of the report folders. The majority of these properties were set when the campaign reports were configured for this partition. However, you must still edit the value of eMessage reports property, `campaignAnalysisTabEmessageOnDemandFolder`, to reflect the actual path of the folder. You do this by inserting the string that identifies the new top-level partition folder.

If the new partition folder in Cognos Connection was named "Campaign Partition 2", you would insert the following string to correct the path:

```
folder[@name='Campaign Partition 2']/
```

That is, you would change the value from:

```
/content/folder[@name='Affinium Campaign']/folder[@name='eMessageReports']
```

to

```
/content/folder[@name='Campaign Partition 2']/folder[@name='Affinium Campaign']/folder[@name='eMessage Reports']
```

1. Log in to IBM Unica Marketing as the `platform_admin` user.
2. Select **Settings > Configuration** .
3. Expand **Campaign > partitions > *partitionName* > reports**
4. Edit the value of each of the `campaignAnalysisTabEmessageOnDemandFolder` so it reflects the actual path to the reporting folder as described above.
5. Save your changes.

Chapter 9. Upgrading Campaign

Before you upgrade Campaign, read the following information:

- “Upgrade prerequisites for all IBM Unica Marketing products”
- Topics specific to your current version (pre-7.x, 7.x, or 8.x)
- Topics specific to eMessage

Important: If you are upgrading from version 8.5, do not select **Automatic DB Setup** during the installation. If you are upgrading from a version before 8.5, select **Automatic DB Setup**. This setting affects eMessage system table creation. Be sure to follow all of the upgrade steps in the appropriate section of this guide, depending on which versions of Campaign and eMessage are currently installed. Different upgrade steps are required for different versions of Campaign and eMessage.

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” on page 3 in the “Preparing to Install” chapter.

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

Remove response files generated by previous installations

Before you run the installer to upgrade from pre-8.6.0 versions, you must delete any response files generated by previous installations.

Old response files are not compatible with 8.6.0 and later installers because changes were made to installer behavior and response file format.

Failure to remove old response files can result in having incorrect data pre-filled in installer fields when the installer is run, or in the installer failing to install some files or skipping configuration steps.

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.

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 client libraries 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 Marketing installers work” on page 15
- 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

The same considerations described in “Marketing Platform requirement” on page 5 apply when you upgrade with one exception.

An Interact 8.x runtime can run an Interact 7.x deployment; therefore, you should upgrade your runtime environments before your design environment.

Also be aware that you must successfully upgrade Marketing Platform prior to or at the same time as the upgrade of any other IBM Unica Marketing product. You cannot upgrade any IBM Unica Marketing products without also upgrading Marketing Platform to the compatible release.

Campaign upgrade scenarios

Follow these guidelines for upgrading Campaign.

Source version	Upgrade path
Any 5.1+ or 6.x version	<ol style="list-style-type: none">1. Perform a new installation of Campaign in a new location.2. Run data migration scripts to migrate configuration settings, files, and data from your source Campaign version. For details, see the <i>IBM Unica Campaign Data Migration Guide</i>.
Any 7.0.x through 7.3.x version	<ol style="list-style-type: none">1. Perform an in-place installation of Campaign over your source version. Select the same location as your current installation, to have the installer automatically run in upgrade mode.2. Run the upgrade tool to upgrade configuration settings, files, and data from your source Campaign version. In addition, some manual configuration may be needed to add configuration properties that were introduced since the release of your source version.3. Reporting in these versions of Campaign was provided by Affinium Reports (versions 7.0.x through 7.2.x). There is no upgrade path from Affinium Reports 7.2.1 to reporting in the IBM Unica Marketing. Therefore, after upgrading from these versions of Affinium Campaign, configure your new reports by following the instructions in the <i>IBM Unica Marketing Platform Installation Guide</i>.

Source version	Upgrade path
Any 7.5.x or 8.x version	<ol style="list-style-type: none"> 1. Perform an in-place installation of Campaign over your source version. Select the same location as your current installation, to have the installer automatically run in upgrade mode. 2. Run the upgrade tool to upgrade configuration settings, files, and data from your source Campaign version. In addition, some manual configuration may be needed to add configuration properties that were introduced since the release of your source version. 3. Upgrade your reports following the instructions in the <i>IBM Unica Marketing Platform Installation Guide</i>.

eMessage upgrade scenarios

When you upgrade the currently installed version of Campaign, the installer determines if an instance of IBM Unica eMessage exists in the same parent folder within the file system. The installer also determines which version of eMessage is currently installed. Consider the following example.

- Campaign is currently installed in C:\IBM_Unica\Campaign
- The installer looks in the same parent folder, in this example C:\IBM_Unica.
- If a previous version of eMessage is installed, it resides in C:\IBM_Unica\ eMessage.
- The IBM Unica installer performs the upgrade differently, depending on the versions of Campaign and eMessage that are currently present in the parent folder. See the guidelines below for details.

The installer automatically installs or upgrades eMessage as part of the Campaign upgrade. You do not upgrade eMessage separately. When the upgrade is complete, eMessage is installed as a subfolder under Campaign, C:\IBM_Unica\Campaign\ eMessage.

Follow these guidelines for upgrading eMessage when you upgrade Campaign.

Currently Installed	Upgrade workflow
Affinium Campaign 7.x Affinium Campaign eMessage 7.x	<p>An in-place upgrade of Affinium Campaign eMessage 7.x to eMessage 8.x is not available.</p> <p>For more information about using eMessage when you upgrade from Campaign 7.x to Campaign 8.x, see “Upgrading Campaign if Affinium Campaign eMessage 7.x is installed” on page 67.</p>

Currently Installed	Upgrade workflow
<p>Campaign 8.x</p> <p>eMessage not installed</p> <p>(Prior to Campaign 8.5, installing eMessage was optional.)</p>	<ol style="list-style-type: none"> 1. Perform an in-place installation of Campaign over the currently installed version. Select the same location as your current installation, to cause the installer to run in upgrade mode. The installer creates a new eMessage installation as a sub-folder in the upgraded Campaign directory and creates the eMessage system tables in the Campaign schema. 2. If you selected automatic database setup, run the upgrade tool to upgrade configuration settings, files, and data from your currently installed Campaign version. 3. Optionally, select a backup location for the current instance of Campaign. <p>After the installer finishes, all required eMessage files are installed but eMessage is not enabled. To use eMessage to send email, you must contact IBM to purchase a hosted email subscription.</p> <p>For more information about how to configure eMessage after you purchase an email subscription, see the <i>IBM Unica eMessage Startup and Administrator's Guide</i>.</p>
<p>Campaign 8.x</p> <p>eMessage 8.x</p>	<ol style="list-style-type: none"> 1. Perform an in-place installation of Campaign over the currently installed version. Select the same location as your current installation, to cause the installer to run in upgrade mode. Note: If you are upgrading from version 8.5, do <i>not</i> select Automatic DB Setup during the installation. If you are upgrading from a version before 8.5, select Automatic DB Setup. This setting affects eMessage system table creation. 2. Run the upgrade tool to upgrade configuration settings, files, and data from your currently installed Campaign version. The upgrade tool updates the eMessage tables as necessary. 3. Optionally, select a backup location for the current instance of Campaign and the current instance of eMessage. <p>All hosted email account account settings are still valid, and no further action is required to be able to resume mailings.</p>

Preparing to upgrade eMessage

When you are planning to upgrade your eMessage installation, you should consider additional upgrade issues that are specific to working with eMessage and the hosted email environment that IBM provides.

Before you upgrade, confirm that your operating system, hardware and software, and network and database resources meet current requirements for all installed IBM Unica Marketing applications, including the current version of eMessage. For specific current requirements, see *IBM Unica Campaign Supported Software*

Environments and Minimum System Requirements, available on Customer Central. Note that the eMessage requirements appear in a separate section and may differ from the requirements for Campaign.

Include the following considerations in your upgrade planning.

- “Scheduling an eMessage upgrade”
- “Complete all recipient list uploads”
- “About outbound email during upgrades”
- “About email responses during an upgrade”

Scheduling an eMessage upgrade

Upgrading eMessage requires stopping system components and taking interfaces offline. An upgrade also interferes with uploading and downloading data from IBM Unica Hosted Services. To avoid issues, schedule the upgrade for a time when there is minimal demand on the system. For example:

- Avoid upgrading when marketing users need to update recipient lists and recipient data.
- Avoid upgrading when marketing users need to run standard mailings or mailings that require close monitoring.
- Do not upgrade your eMessage installation when scheduled mailings are configured to run.
- Schedule the upgrade to occur immediately after you upgrade IBM Marketing Platform.
- Allow enough time to provide advance notice to all users about when you plan to begin the upgrade.

Complete all recipient list uploads

Running a Campaign flowchart that contains an eMessage process causes Campaign to automatically upload recipient list data (as an Output List Table, or OLT) to IBM Unica Hosted Services. However, upgrade activities can interfere with OLT uploads.

To avoid OLT upload issues, IBM recommends that you schedule the upgrade for a time when there are no requirements to upload recipient list data. Before you begin the eMessage upgrade, confirm that all Campaign flowcharts that contain an eMessage process have finished running.

To preserve in-progress recipient list configuration work, save your work and back up all local files and databases before starting the upgrade. (Mailing configurations are saved in IBM Unica Hosted Services and are unaffected by the upgrade.) For more information on performing the required local backups, see “Back up Campaign” on page 68.

About outbound email during upgrades

During an upgrade, the eMessage mailing interface is not available. You cannot configure or start new mailings. Mailings that you have already started will run, but you cannot monitor, pause, or stop them.

About email responses during an upgrade

Upgrading eMessage requires temporarily stopping the Response and Contact Tracker (RCT).

During the upgrade, you may experience some delay in the availability of mailing response data. This information is not lost. IBM Unica Hosted Services queues response and contact data during the time that the RCT is stopped. When you restart the RCT, it downloads all of the accumulated information.

During the upgrade, individuals that received email during previous mailings will encounter no changes in the availability of links contained in the email, the speed of response to link clicks, or web site requests as a result of the upgrade activity. IBM supports these functions with resources maintained in IBM Unica Hosted Services.

Upgrading from pre-7.x versions of Affinium Campaign

For 5.1+ or 6.x versions of Affinium Campaign, in-place upgrading to Campaign is not available. You must perform a new installation of Campaign in a location different from that of your existing installation, then install and run data migration scripts to migrate configuration settings, files, and data from your Affinium Campaign installation (source system) to Campaign (target system). You do not run the upgrade tool.

Perform the tasks detailed in this section before performing data migration as detailed in the *Campaign Data Migration Guide*.

Upgrade to the IBM Unica Marketing Platform

Campaign requires the Marketing Platform. Before upgrading from any pre-8.x version of Affinium Campaign to IBM Unica Campaign, you must first upgrade from Affinium Manager to the Marketing Platform. For details, see the *IBM Unica Marketing Platform Installation Guide*.

Export configuration settings (optional)

If your new Campaign installation will require any of the configuration settings from your previous Campaign installation, use the IBM Unica `configTool` utility to export your Campaign configuration parameters prior to upgrading. Specify and make a note of a unique file name and location for the exported.xml file that the `configTool` utility creates so that you can locate it following the upgrade process.

For syntax, commands, and options for the `configTool` utility, see “The `configTool` utility” on page 83.

Unregister Affinium Campaign

Check the Configuration page on Marketing Platform for a Campaign node in the configuration tree. If one is present, use the `MarketingPlatformconfigTool` utility to un-register and therefore remove the Campaign node from the configuration tree.

For syntax, commands, and options for the `configTool` utility, see “The `configTool` utility” on page 83.

Prepare for installation

Before installing Campaign, ensure that your Campaign environment meets the following requirements. In addition, see “Upgrade prerequisites for all IBM Unica Marketing products” on page 61 for the system compatibility and accessibility requirements of the source and target systems.

- You must be able to run both source and target installations of Campaign simultaneously (for example, by installing the new version of Campaign on a different machine, on a different instance of the web application server, or on a different domain).
- If your source Affinium Campaign installation has multiple partitions that you want to migrate, the same number of partitions must exist in Campaign. The migration process does not automatically create new partitions in Campaign. Create these partitions before migrating your source system data to the target system.

Install, deploy, and configure IBM Unica Campaign

Follow the instructions in this guide to install, deploy, and configure Campaign. When prompted for the install location during installation, select a location different from your source Campaign system's location so that the installer automatically performs a new install.

Import configuration settings (optional)

After installing Campaign, you can accept the default Campaign configuration settings on the Configuration page, or change settings as required. If you want to use any of the settings from your source version of Affinium Campaign, refer to the XML file containing the exported configuration parameters from your source version to obtain the required settings.

You can enter configuration changes manually on the Configuration page, or use the `configTool` utility to import settings. If large blocks of values need to be changed, consider using the `configTool` utility.

For details on using the Configuration page, see the *IBM Unica Marketing Platform Administrator's Guide*.

For details on using the `configTool` utility, see "The `configTool` utility" on page 83.

Migrate data to IBM Unica Campaign

After installing, deploying and configuring Campaign and installing the data migration utilities, migrate data from your source version of Affinium Campaign to the target installation of Campaign. For details on performing data migration tasks, see the *Campaign Data Migration Guide*.

Upgrading from any Campaign 7.x version

Perform the tasks detailed in this section to upgrade from any Campaign 7.x version to the new version of Campaign.

Upgrading Campaign if Affinium Campaign eMessage 7.x is installed

An in-place upgrade of Affinium Campaign eMessage 7.x to IBM Unica eMessage 8.x is not available.

When you first begin to upgrade IBM Unica Marketing, the IBM Unica installer prevents you from proceeding with the upgrade if it finds Affinium Campaign eMessage 7.x installed in the target installation directory.

To continue to collect and manage recipient responses to current eMessage 7.x mailings, you must continue to operate the eMessage 7.x installation.

If you are currently using eMessage 7.x, you have the following options.

- Uninstall Affinium Campaign eMessage 7.x and upgrade Campaign.

Important: Uninstalling eMessage removes all current eMessage 7.x data, configurations, and mailings.

- Work with IBM to devise a strategy to migrate your eMessage 7.x installation to a fresh eMessage 8.x installation.

To work with IBM to move from Affinium Campaign eMessage 7.x to IBM Unica eMessage 8.x, contact Product Technical Support. For contact information, see “Contacting IBM Unica technical support” on page 99.

Export configuration settings (optional)

If your new Campaign installation will require any of the configuration settings from your previous Campaign installation, use the IBM Unica configTool utility to export your Campaign configuration parameters prior to upgrading. Specify and make a note of a unique file name and location for the exported.xml file that the configTool utility creates so that you can locate it following the upgrade process.

For syntax, commands, and options for the configTool utility, see “The configTool utility” on page 83.

Back up Campaign

Be sure to back up the following information prior to beginning the Campaign upgrade installation:

1. Back up your Campaign installation directory and, if it is installed, your eMessage installation directory as well.

The Campaign upgrade process installs all files required to run both Campaign and eMessage, and, if you have an existing eMessage installation, will upgrade that installation along with Campaign.

Note that the IBM Unica installer will also offer to make a backup of your installed files automatically during the upgrade process. You can complete the backup step here manually, during the installation automatically, or both.

2. Back up the system table databases used by your existing installation of Campaign and, if it is installed, eMessage.

See your database documentation for instructions on making backups of your data.

When you have completed these backup steps, you have a way to restore to a known working state in case of issues during the upgrade process.

Undeploy Campaign

Prior to starting the upgrade, configure the web application server to release any existing lock on the Campaign.war file on the system you are upgrading. This allows the upgrade to register the new version of Campaign in Marketing Platform.

1. Follow the instructions in your web application server to undeploy the Campaign.war file, and save or activate all changes.
2. Shut down and restart the web application server after undeploying Campaign to ensure that the lock on the Campaign.war 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 the Campaign upgrade

To install the upgrade to Campaign, follow the instructions in “Step: Run the IBM Unica installer” on page 19.

When you are prompted for the install location, specify the parent directory of the existing Campaign installation directory. The software will be installed in the Campaign folder under the parent directory you specify, for example:
`parent_directory\Campaign.`

The installer detects your existing version of Campaign and prompts you to confirm the upgrade. After you confirm the upgrade, the installer automatically performs the installation in upgrade mode.

The upgrade installation updates the existing registration information for the new version of Campaign.

Redeploy Campaign in the web application server

Redeploy the newly installed version of Campaign in your web application server. Be sure to restart the Campaign listener, also known as the server, when you are done. For instructions, see Chapter 5, “Deploying the Campaign web application,” on page 29.

Review SQL upgrade script and modify, if necessary

Upgrading Campaign may require modifications to the SQL upgrade script for your database. Modifications are required in the following cases:

- If your Campaign environment includes customizations to the Campaign system tables that modified the default Data Definition Language (DDL) scripts included with Campaign (for example, custom audience levels or changes to field names), you must modify the default SQL upgrade script for your database to match your customizations.
- Pre-8.x source versions only: Campaign stores values for text custom campaign attributes in the `StringValue` column in the `UA_CampAttribute` table. By default, this column is set to `varchar(1024)`. In Campaign versions 7.5.x and earlier, such string campaign attributes were stored in the `UA_CampaignExtAttr` table in additionally added columns. If your source version of Campaign contains custom attributes in the `UA_CampaignExtAttr` table that exceed 1024 bytes, you must either modify these attributes or change the `StringValue` column in the `UA_CampAttribute` table to accommodate your data.

Important: You must complete any of these changes that your installation requires prior to running the Campaign upgrade tool.

The upgrade scripts are installed in the `/tools/migration/5.1+To8.x` directory in the path where you have installed the upgrade tools. Use the appropriate script for your database type:

- `ac_upgrade_db2.sql` — DB2 upgrade script (non-Unicode)
- `ac_upgrade_db2_unicode.sql` — DB2 upgrade script (Unicode)

- ac_upgrade_oracle.sql — Oracle upgrade script (non-Unicode)
ac_upgrade_oracle_unicode.sql — Oracle upgrade script (Unicode)
- ac_upgrade_sqlsvr.sql — MS SQL Server upgrade script (non-Unicode)
ac_upgrade_sqlsvr_unicode.sql — MS SQL Server upgrade script (Unicode)

Example modifications to the SQL upgrade script

The following examples show required modifications to the SQL upgrade script for two scenarios:

Example 1: Change to a field name associated with an audience level

In your existing Campaign environment, the CustomerID field in the UA_ContactHistory table has been changed to ID.

To accommodate this field name change, you would need to change all the occurrences of CustomerID to ID in the upgrade script.

Example 2: Additional audience level

Your existing Campaign environment contains an additional audience level called Household. To support this audience level, your database contains tables named HH_ContactHistory, HH_ResponseHistory, and HH_DtlContactHist. The primary key is HouseholdID.

To support the Household audience level in your new Campaign installation, locate the code in the SQL upgrade script that updates response history and treatment sizes for the Customer audience level and replicate it for your Household audience level. Change the table names in these statements to the appropriate names for your Household audience level, and change any references to CustomerID to HouseholdID.

The following example SQL statements show the required additions to the ac_upgrade_sqlsvr.sql script for a SQL Server database containing the Household audience level. Text that has been changed to support the Household audience level is in bold:

```
-- ResponseHistory update "template"
ALTER TABLE HH_ResponseHistory ADD DirectResponse int NULL
go

-- Update the treatment sizes

update ua_treatment
  set treatmentsize=(select count(DISTINCT HouseholdID)
  from HH_ContactHistory
  where HH_ContactHistory.CellID = ua_treatment.CellID
  AND HH_ContactHistory.PackageID = ua_treatment.PackageID
  and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 0)

where exists

(select * from hh_contacthistory
  where hh_contacthistory.CellID = ua_treatment.CellID
  AND hh_contacthistory.PackageID = ua_treatment.PackageID
  and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 0)
go

update ua_treatment
  set treatmentsize=(select count(DISTINCT HouseholdID)
  from HH_DtlContactHist
```

```
where HH_DtlContactHist.TreatmentInstID = ua_treatment.TreatmentInstID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 1)
```

where exists

```
(select * from hh_dtlcontacthist
where hh_dtlcontacthist.TreatmentInstID = ua_treatment.TreatmentInstID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 1)
go
```

For more information on managing database tables and audience levels, see the *Campaign Administrator's Guide*.

Set environment variables

Edit the setenv file to set environment variables required by the upgrade tool. The file, called setenv.sh in UNIX and setenv.bat in Windows, is located in the /tools/migration/5.1+To8.6 directory in the path where you installed the upgrade tools.

1. Open the setenv file using any text editor.

The file, called setenv.sh in UNIX and setenv.bat in Windows, is located in the /tools/migration/5.1+To8.6 directory in the path where you have installed the upgrade tools.

2. Follow the instruction comments contained in the setenv file itself to complete any values relevant to your installation.

You must set the following variables for any Campaign upgrade:

Required Variable	Description
JAVA_HOME	Root directory of the JDK used by your Campaign installation. For WebLogic 10gR3 or higher, which uses JDK1.6, you must provide the JAVA_HOME path to JDK1.6; the upgrade tool utility fails if provided with a JAVA_HOME other than JDK1.6.
JDBC_DRIVER_CLASSPATH	Full path for the JDBC drivers, including the .jar file. For both Weblogic and WebSphere, the path needs to include the .jar file. For DB2 9.1, you must specify db2jcc.jar and db2jcc_license_cu.jar.
IS_WEBLOGIC_SSL BEA_HOME_PATH SSL_TRUST_KEYSTORE_FILE_PATH	If the connection to the target system tables is via the Weblogic server and you are using SSL, you must set IS_WEBLOGIC_SSL=YES, then set the BEA_HOME_PATH and SSL_TRUST_KEYSTORE_FILE_PATH. See the instructions in the setenv file for details.

There are many other variables you can set. For example, to run Unicode script, set IS_UNICODE_SCRIPT = Y. For all other values, follow the instructions in the setenv file.

Gather information required for running the upgrade tool

Before running acUpgradeTool, gather the following information about your Campaign installation :

- Directory path of UNICA_PLATFORM_HOME
- Directory path of CAMPAIGN_HOME
- For a multi-partition upgrade, the names of the partitions to be upgraded
- Connection information for the target Campaign system (URL and port)
- Connection type (WebLogic or JDBC) and location of the JAR files
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver, if any
- User name and password for the target system tables database
- Catalog (or database) for the target system tables
- Schema for the target system tables
- Version of Campaign you are upgrading from
- Full or relative path of the Campaign configuration file (campaign_configuration.xml). This file is located in the conf directory under your Campaign installation.

About the upgrade log

After you run the upgrade tool, it writes processing details, warnings, or errors to a log.

By default, the log is named `ac_upgrade.log` and is located in the `logs` directory in your Campaign installation directory (for example, `/IBM/Unica/Campaign/logs/ac_upgrade.log`).

The log's location and level of verbosity are specified in the `setenv` script file in the same directory as the upgrade tool, and you can modify it as required prior to running the upgrade tool. Check the upgrade log for warnings and errors and correct any errors before completing your upgrade.

Note: A `CHRH.log` is also generated in the same location. This log file is 0 KB in size and can be ignored.

About upgrading partitions

If you have multiple partitions, run the upgrade tool once for each partition.

Run the upgrade tool

If you have not already done so, customize the `setenv` file with the information about your environment that the upgrade tool will need. See "Set environment variables" on page 71 for details.

You must also have the upgrade tools installed on the system where you will be running them. If your setup is distributed, the tools must be installed on the system where the Campaign web application is installed.

During your Campaign installation, the installer provided a checklist of components to install, and Upgrade Tools was listed; if you did not select that option during installation, you can install the upgrade tools prior to following these instructions by running the installer again with **only** the Upgrade Tools option selected.

After redeploying your new version of Campaign, you must run the upgrade tool to update the Campaign system tables. If you have multiple partitions, you must configure and run the upgrade tool once for each partition.

Important: The appropriate database client executable (db2, osql, or sqlplus) for the Campaign system tables data source must be accessible on the PATH of the user who will run the upgrade tool.

1. Complete the following prior to running the upgrade tool:
 - a. Start the web application server on the target system and the IBM Unica Marketing web application.
 - b. Shut down the following servers:
 - Campaign listeners on the source and target systems
 - UDI servers on the source and target systems
2. Run the upgrade tool (acUpgradeTool) found in the /tools/migration/5.1+To8.x directory (where 8.x is the version to which you are currently upgrading) in the path where you have installed Campaign.

Enter the requested information at the prompts to upgrade your system tables for the new version of Campaign.

When the tool completes successfully, your upgrade process is complete.

Note that if you see memory errors while running the upgrade tool, the setenv file to specify larger Java heap memory sizes (in the JAVA_OPTIONS environment variable), then try running the tool again. For details, see “Set environment variables” on page 71.

Reenter the Campaign system user password

After running the upgrade tool, but before you start the Campaign server, you must reenter the existing password for the Campaign system user that is used to access the UA_SYSTEM_TABLES data source. This is required for the system tables to map automatically. If you do not reenter the Campaign system user password, database authentication will fail, and you will need to map the system tables manually after the upgrade.

Reenter the Campaign system user password on the User page in the Marketing Platform. The Campaign system user is specified in the ASMUserForDBCredentials property in the Campaign > partitions > partition[n]> dataSources > UA_SYSTEM_TABLES data source on the Configuration page.

Upgrading from any Campaign 8.x version

Upgrading from any Campaign version 8.x installation is considered an in-place upgrade, where you should install into the same directory as your current installation. Follow the instructions here to upgrade any version 8.x installation to the new version of Campaign.

About eMessage and upgrading Campaign

Note: If you do not plan to use eMessage to send hosted email, you can skip this section.

If you currently use eMessage 8.x

If you are upgrading from version 8.5, do *not* select **Automatic DB Setup** during the installation. If you are upgrading from a version before 8.5, select **Automatic DB Setup** during the installation. This setting affects eMessage system table creation. Your next main steps, after the upgrade installer completes, are to modify the SQL upgrade script (if necessary) and run the upgrade tool (acUpgradeTool). Be sure to follow all of the steps described in this guide.

After you run the upgrade installer, eMessage continues to be enabled and the upgrade does not affect your current hosted email account settings or eMessage system tables. If changes to the eMessage system tables are part of the upgrade, IBM will provide schema upgrade scripts.

For more information about other versions of Campaign and eMessage, see “eMessage upgrade scenarios” on page 63.

If you do not currently use eMessage, but plan to start after the upgrade

If you do not currently use eMessage, the IBM Unica installer creates a new eMessage installation as a sub-folder in the upgraded Campaign directory. You must create and populate the eMessage system tables if you did not select **Automatic DB Setup** during the upgrade. For more information about how to create the eMessage tables, see “Step: Create and populate the Campaign system tables manually, if necessary” on page 23.

After you run the upgrade installer, complete the pre-deployment configuration steps related to eMessage that are described in Chapter 4, “Configuring Campaign before deployment,” on page 23.

eMessage is not enabled until you purchase a hosted email subscription and complete the hosted email startup process. For more information about completing the steps required to configure a hosted email account and start using eMessage to send hosted email, see the *IBM Unica eMessage Startup and Administrator’s Guide*.

Export configuration settings (optional)

If your new Campaign installation will require any of the configuration settings from your previous Campaign installation, use the IBM Unica configTool utility to export your Campaign configuration parameters prior to upgrading. Specify and make a note of a unique file name and location for the exported.xml file that the configTool utility creates so that you can locate it following the upgrade process.

For syntax, commands, and options for the configTool utility, see “The configTool utility” on page 83.

Back up Campaign

Be sure to back up the following information prior to beginning the Campaign upgrade installation:

1. Back up your Campaign installation directory and, if it is installed, your eMessage installation directory as well.

The Campaign upgrade process installs all files required to run both Campaign and eMessage, and, if you have an existing eMessage installation, will upgrade that installation along with Campaign.

Note that the IBM Unica installer will also offer to make a backup of your installed files automatically during the upgrade process. You can complete the backup step here manually, during the installation automatically, or both.

2. Back up the system table databases used by your existing installation of Campaign and, if it is installed, eMessage.

See your database documentation for instructions on making backups of your data.

When you have completed these backup steps, you have a way to restore to a known working state in case of issues during the upgrade process.

Stop the Response and Contact Tracker

Required only if you are currently using eMessage.

If you are using IBM Unica eMessage, you must stop the Response and Contact Tracker (RCT) before you start the upgrade. If you registered the RCT as a service, you must stop the service.

Note: You must restart the RCT after you complete the upgrade. The RCT or RCT service does not restart automatically after the upgrade.

Stopping the RCT manually

You stop the RCT by running the `rct` script, which is in the `bin` directory of your eMessage installation. Run the script as follows.

```
rct stop
```

For more information about this script, see “The RCT script” on page 95.

Stopping the RCT registered as a service

Removing the RCT as a service prevents the RCT from restarting automatically during the upgrade when you restart the operating system.

Stop the RCT service with the commands that are provided by your operating system for managing services.

Undeploy Campaign

Prior to starting the upgrade, configure the web application server to release any existing lock on the `Campaign.war` file on the system you are upgrading. This allows the upgrade to register the new version of Campaign in Marketing Platform.

1. Follow the instructions in your web application server to undeploy the `Campaign.war` file, and save or activate all changes.
2. Shut down and restart the web application server after undeploying Campaign to ensure that the lock on the `Campaign.war` 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 the Campaign upgrade

To install the upgrade to Campaign, follow the instructions in “Step: Run the IBM Unica installer” on page 19.

When you are prompted for the install location, specify the parent directory of the existing Campaign installation directory. The software will be installed in the Campaign folder under the parent directory you specify, for example: `parent_directory\Campaign`.

The installer detects your existing version of Campaign and prompts you to confirm the upgrade. After you confirm the upgrade, the installer automatically performs the installation in upgrade mode.

The upgrade installation updates the existing registration information for the new version of Campaign.

Redeploy Campaign in the web application server

Redeploy the newly installed version of Campaign in your web application server. Be sure to restart the Campaign listener, also known as the server, when you are done. For instructions, see Chapter 5, “Deploying the Campaign web application,” on page 29.

Restart the Response and Contact Tracker

If you are using eMessage, you must restart the Response and Contact tracker (RCT) after the upgrade.

Restarting the RCT manually

To restart the RCT manually, use the `rct start` command. The RCT script is in the `bin` directory under your eMessage installation. For more information, see “The RCT script” on page 95.

Restarting the RCT as a service

To restart the RCT every time you restart the operating system of the machine where the RCT is installed, add the RCT as a service. For instructions, see “The `MKService_rct` script” on page 95.

Note: When you restart the RCT as a service, you must manually restart the RCT the first time.

Review SQL upgrade script and modify, if necessary

Upgrading Campaign may require modifications to the SQL upgrade script for your database. Modifications are required in the following cases:

- If your Campaign environment includes customizations to the Campaign system tables that modified the default Data Definition Language (DDL) scripts included with Campaign (for example, custom audience levels or changes to field names), you must modify the default SQL upgrade script for your database to match your customizations.
- Pre-8.x source versions only: Campaign stores values for text custom campaign attributes in the `StringValue` column in the `UA_CampAttribute` table. By default, this column is set to `varchar(1024)`. In Campaign versions 7.5.x and earlier, such string campaign attributes were stored in the `UA_CampaignExtAttr` table in

additionally added columns. If your source version of Campaign contains custom attributes in the UA_CampaignExtAttr table that exceed 1024 bytes, you must either modify these attributes or change the StringValue column in the UA_CampAttribute table to accommodate your data.

Important: You must complete any of these changes that your installation requires prior to running the Campaign upgrade tool.

The upgrade scripts are installed in the /tools/migration/5.1+To8.x directory in the path where you have installed the upgrade tools. Use the appropriate script for your database type:

- ac_upgrade_db2.sql — DB2 upgrade script (non-Unicode)
ac_upgrade_db2_unicode.sql — DB2 upgrade script (Unicode)
- ac_upgrade_oracle.sql — Oracle upgrade script (non-Unicode)
ac_upgrade_oracle_unicode.sql — Oracle upgrade script (Unicode)
- ac_upgrade_sqlsvr.sql — MS SQL Server upgrade script (non-Unicode)
ac_upgrade_sqlsvr_unicode.sql — MS SQL Server upgrade script (Unicode)

Example modifications to the SQL upgrade script

The following examples show required modifications to the SQL upgrade script for two scenarios:

Example 1: Change to a field name associated with an audience level

In your existing Campaign environment, the CustomerID field in the UA_ContactHistory table has been changed to ID.

To accommodate this field name change, you would need to change all the occurrences of CustomerID to ID in the upgrade script.

Example 2: Additional audience level

Your existing Campaign environment contains an additional audience level called Household. To support this audience level, your database contains tables named HH_ContactHistory, HH_ResponseHistory, and HH_DtlContactHist. The primary key is HouseholdID.

To support the Household audience level in your new Campaign installation, locate the code in the SQL upgrade script that updates response history and treatment sizes for the Customer audience level and replicate it for your Household audience level. Change the table names in these statements to the appropriate names for your Household audience level, and change any references to CustomerID to HouseholdID.

The following example SQL statements show the required additions to the ac_upgrade_sqlsvr.sql script for a SQL Server database containing the Household audience level. Text that has been changed to support the Household audience level is in bold:

```
-- ResponseHistory update "template"
ALTER TABLE HH_ResponseHistory ADD DirectResponse int NULL
go

-- Update the treatment sizes

update ua_treatment
set treatmentsize=(select count(DISTINCT HouseholdID)
```

```

from HH_ContactHistory
where HH_ContactHistory.CellID = ua_treatment.CellID
AND HH_ContactHistory.PackageID = ua_treatment.PackageID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 0)

where exists

(select * from hh_contacthistory
where hh_contacthistory.CellID = ua_treatment.CellID
AND hh_contacthistory.PackageID = ua_treatment.PackageID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 0)
go

update ua_treatment
set treatmentsize=(select count(DISTINCT HouseholdID)
from HH_DtlContactHist
where HH_DtlContactHist.TreatmentInstID = ua_treatment.TreatmentInstID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 1)

where exists

(select * from hh_dtlcontacthist
where hh_dtlcontacthist.TreatmentInstID = ua_treatment.TreatmentInstID
and ua_treatment.CntrlTreatmtFlag = 1 and ua_treatment.HasDetailHistory = 1)
go

```

For more information on managing database tables and audience levels, see the *Campaign Administrator's Guide*.

Set environment variables

Edit the setenv file to set environment variables required by the upgrade tool. The file, called setenv.sh in UNIX and setenv.bat in Windows, is located in the /tools/migration/5.1+To8.6 directory in the path where you installed the upgrade tools.

1. Open the setenv file using any text editor.
The file, called setenv.sh in UNIX and setenv.bat in Windows, is located in the /tools/migration/5.1+To8.6 directory in the path where you have installed the upgrade tools.
2. Follow the instruction comments contained in the setenv file itself to complete any values relevant to your installation.

You must set the following variables for any Campaign upgrade:

Required Variable	Description
JAVA_HOME	Root directory of the JDK used by your Campaign installation. For WebLogic 10gR3 or higher, which uses JDK1.6, you must provide the JAVA_HOME path to JDK1.6; the upgrade tool utility fails if provided with a JAVA_HOME other than JDK1.6.
JDBC_DRIVER_CLASSPATH	Full path for the JDBC drivers, including the .jar file. For both Weblogic and WebSphere, the path needs to include the .jar file. For DB2 9.1, you must specify db2jcc.jar and db2jcc_license_cu.jar.

Required Variable	Description
IS_WEBLOGIC_SSL	If the connection to the target system tables is via the Weblogic server and you are using SSL, you must set IS_WEBLOGIC_SSL=YES, then set the BEA_HOME_PATH and SSL_TRUST_KEYSTORE_FILE_PATH. See the instructions in the setenv file for details.
BEA_HOME_PATH	
SSL_TRUST_KEYSTORE_FILE_PATH	

There are many other variables you can set. For example, to run Unicode script, set IS_UNICODE_SCRIPT = Y. For all other values, follow the instructions in the setenv file.

Gather information required for running the upgrade tool

Before running acUpgradeTool, gather the following information about your Campaign installation :

- Directory path of UNICA_PLATFORM_HOME
- Directory path of CAMPAIGN_HOME
- For a multi-partition upgrade, the names of the partitions to be upgraded
- Connection information for the target Campaign system (URL and port)
- Connection type (WebLogic or JDBC) and location of the JAR files
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver, if any
- User name and password for the target system tables database
- Catalog (or database) for the target system tables
- Schema for the target system tables
- Version of Campaign you are upgrading from
- Full or relative path of the Campaign configuration file (campaign_configuration.xml). This file is located in the conf directory under your Campaign installation.

About the upgrade log

After you run the upgrade tool, it writes processing details, warnings, or errors to a log.

By default, the log is named ac_upgrade.log and is located in the logs directory in your Campaign installation directory (for example, /IBM/Unica/Campaign/logs/ac_upgrade.log).

The log's location and level of verbosity are specified in the setenv script file in the same directory as the upgrade tool, and you can modify it as required prior to running the upgrade tool. Check the upgrade log for warnings and errors and correct any errors before completing your upgrade.

Note: A CHRH.log is also generated in the same location. This log file is 0 KB in size and can be ignored.

About upgrading partitions

If you have multiple partitions, run the upgrade tool once for each partition.

Run the upgrade tool

If you have not already done so, customize the `setenv` file with the information about your environment that the upgrade tool will need. See “Set environment variables” on page 71 for details.

You must also have the upgrade tools installed on the system where you will be running them. If your setup is distributed, the tools must be installed on the system where the Campaign web application is installed.

During your Campaign installation, the installer provided a checklist of components to install, and Upgrade Tools was listed; if you did not select that option during installation, you can install the upgrade tools prior to following these instructions by running the installer again with **only** the Upgrade Tools option selected.

After redeploying your new version of Campaign, you must run the upgrade tool to update the Campaign system tables. If you have multiple partitions, you must configure and run the upgrade tool once for each partition.

Important: The appropriate database client executable (`db2`, `osql`, or `sqlplus`) for the Campaign system tables data source must be accessible on the `PATH` of the user who will run the upgrade tool.

1. Complete the following prior to running the upgrade tool:
 - a. Start the web application server on the target system and the IBM Unica Marketing web application.
 - b. Shut down the following servers:
 - Campaign listeners on the source and target systems
 - UDI servers on the source and target systems
2. Run the upgrade tool (`acUpgradeTool`) found in the `/tools/migration/5.1+To8.x` directory (where `8.x` is the version to which you are currently upgrading) in the path where you have installed Campaign.

Enter the requested information at the prompts to upgrade your system tables for the new version of Campaign.

When the tool completes successfully, your upgrade process is complete.

Note that if you see memory errors while running the upgrade tool, the `setenv` file to specify larger Java heap memory sizes (in the `JAVA_OPTIONS` environment variable), then try running the tool again. For details, see “Set environment variables” on page 71.

Appendix A. 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*.

About Marketing Platform utilities

This section provides an overview of the Marketing Platform utilities, including some details that apply to all of the utilities and which are not included in the individual utility descriptions.

Location of utilities

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

List and descriptions of utilities

The Marketing Platform provides the following utilities.

- “The `configTool` utility” on page 83 - imports, exports, and deletes configuration settings, including product registrations
- “The `datafilteringScriptTool` utility” on page 86 - creates data filters
- “The `encryptPasswords` utility” on page 88 - encrypts and stores passwords
- “The `partitionTool` utility” on page 89 - creates database entries for partitions
- “The `populateDb` utility” on page 91 - populates the Marketing Platform database
- “The `restoreAccess` utility” on page 92 - restores a user with the `platformAdminRole` role
- “The `scheduler_console_client` utility” on page 93 - lists or kicks off IBM Unica Scheduler jobs configured to listen for a trigger

Prerequisites for running Marketing Platform utilities

The following are prerequisites for running all Marketing Platform utilities.

- Run all utilities from the directory where they are located (by default, the `tools/bin` directory under your Marketing Platform installation).
- On UNIX, the best practice is to run the utilities with the same user account that runs the application server on which Marketing Platform is deployed. If you run a utility with a different user account, adjust the permissions on the `platform.log` file to allow that user account to write to it. If you do not adjust permissions, the utility is not able to write to the log file and you might see some error messages, although the tool should still function correctly.

Troubleshooting connection issues

If a Marketing Platform utility fails to complete its task successfully, you can use the following information to help you resolve the issue.

- All of the Marketing Platform utilities except `encryptPasswords` interact with the Marketing Platform system tables. To connect to the system table database, these utilities use the following connection information, which is set by the installer using information provided when the Marketing Platform was installed.
 - JDBC driver name
 - JDBC connection URL (which includes the host, port, and database name)
 - Data source login
 - Data source password (encrypted)

This information is stored in the `jdbc.properties` file, located in the `tools/bin` directory under your Marketing Platform installation. Check the values in this file to ensure they are correct for your environment.

- In addition, Marketing Platform utilities rely on the `JAVA_HOME` environment variable, set either in the `setenv` script located in the `tools/bin` directory of your Marketing Platform installation, or on the command line.

The Marketing Platform installer should have set this variable automatically in the `setenv` script, but it is a good practice to verify that the `JAVA_HOME` variable is set if you have a problem running a utility. The JDK must be the Sun version (not, for example, the JRockit JDK available with WebLogic).

Wherever it is set, the `JAVA_HOME` environment variable must point to the 1.6 version of the Sun JRE.

If your `JAVA_HOME` environment variable points to an incorrect JRE, then you must unset the `JAVA_HOME` variable before you run the IBM Unica installers. You can do this as follows.

- Windows: In a command window, enter
`set JAVA_HOME=leave empty and press return key`
- *NIX-type systems: In the terminal, enter
`export JAVA_HOME=leave empty and press return key`

Do this before you invoke the Marketing Platform utility you want to run.

Special characters

Characters that are designated as reserved characters in the operating system must be escaped. Consult your operating system documentation for a list of reserved characters and how to escape them.

Standard options in Marketing Platform utilities

The following options are available in all Marketing Platform utilities.

`-l logLevel`

Set the level of log information displayed in the console. Options are `high`, `medium`, and `low`. The default is `low`.

`-L`

Set the locale for console messages. The default locale is `en_US`. The available option values are determined by the languages into which the Marketing Platform has been translated. Specify the locale using the ICU locale ID according to ISO 639-1 and ISO 3166.

`-h`

Display a brief usage message in the console.

-m

Display the manual page for this utility in the console.

-v

Display more execution details in the console.

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 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 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.

Important: 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 changed. However, the names recognized by configTool did not change. The valid product names for use with configTool are listed below, along with the current names of the products.

Product name	Name used in configTool
Marketing Platform	Manager
Campaign	Campaign
Distributed Marketing	Collaborate
eMessage	emessage
Interact	interact
Optimize	Optimize
Marketing Operations	Plan

Product name	Name used in configTool
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 wanted 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 quotation marks.

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 parentheses in the right

pane. Delimit a path in the configuration property hierarchy using the | character, and surround the path with double quotation marks.

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 wanted 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 quotation marks.

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.

Note the following.

- When you use the -r option, the registration file must have <application> as the first tag in the XML.
Other files may be provided with your product that you can use to insert configuration properties into the Marketing Platform database. For these files, use the -i option. Only the file that has the <application> tag as the first tag can be used with the -r option.
- The registration file for the Marketing Platform is named Manager_config.xml, and the first tag is <Suite>. To register this file on a new installation, use the populateDb utility, or rerun the Marketing Platform installer as described in the *IBM Unica Marketing Platform Installation Guide*.
- After the initial installation, to reregister products other than the Marketing Platform, use configTool with the -r option and -o to overwrite the existing properties.

-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 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 `datafilteringScriptTool` utility

The `datafilteringScriptTool` utility reads an XML file to populate the data filtering tables in the Marketing Platform system table database.

Depending on how you write the XML, you can use this utility in two ways.

- Using one set of XML elements, you can auto-generate data filters based on unique combinations of field values (one data filter for each unique combination).
- Using a slightly different set of XML elements, you can specify each data filter that the utility creates.

See *IBM Unica Marketing Platform the Administrator's Guide* for information about creating the XML.

When to use datafilteringScriptTool

You must use datafilteringScriptTool when you create new data filters.

Prerequisites

The Marketing Platform must be deployed and running.

Using datafilteringScriptTool with SSL

When the Marketing Platform is deployed using one-way SSL you must modify the datafilteringScriptTool script to add the SSL options that perform handshaking. To modify the script, you must have the following information.

- Truststore file name and path
- Truststore password

In a text editor, open the datafilteringScriptTool script (.bat or .sh) and find the lines that look like this (examples are Windows version).

```
:call exec
```

```
"%JAVA_HOME%\bin\java" -DUNICA_PLATFORM_HOME="%UNICA_PLATFORM_HOME%"
```

```
com.unica.management.client.datafiltering.tool.DataFilteringScriptTool %*
```

Edit these lines to look like this (new text is in **bold**). Substitute your truststore path and file name and truststore password for myTrustStore.jks and myPassword.

```
:call exec
```

```
SET SSL_OPTIONS=-Djavax.net.ssl.keyStoreType="JKS"
```

```
-Djavax.net.ssl.trustStore="C:\security\myTrustStore.jks"
```

```
-Djavax.net.ssl.trustStorePassword=myPassword
```

```
"%JAVA_HOME%\bin\java" -DUNICA_PLATFORM_HOME="%UNICA_PLATFORM_HOME%"  
%SSL_OPTIONS%
```

```
com.unica.management.client.datafiltering.tool.DataFilteringScriptTool %*
```

Syntax

```
datafilteringScriptTool -r pathfile
```

Commands

-r *path_file*

Import data filter specifications from a specified XML file. If the file is not located in the tools/bin directory under your installation, provide a path and enclose the *path_file* parameter in double quotation marks.

Example

- Use a file named `collaborateDataFilters.xml`, located in the `C:\unica\xml` directory, to populate the data filter system tables.

```
datafilteringScriptTool -r "C:\unica\xml\collaborateDataFilters.xml"
```

The encryptPasswords utility

The `encryptPasswords` utility is used to encrypt and store either of two passwords that the Marketing Platform uses, as follows.

- The password that the Marketing Platform uses to access its system tables. The utility replaces an existing encrypted password (stored in the `jdbc.properties` file, located in the `tools\bin` directory under your Marketing Platform installation) with a new one.
- The keystore password used by the Marketing Platform when it is configured to use SSL with a certificate other than the default one supplied with the Marketing Platform or the web application server. The certificate can be either a self-signed certificate or a certificate from a certificate authority.

When to use encryptPasswords

Use `encryptPasswords` as for the following reasons.

- When you change the password of the account used to access your Marketing Platform system table database.
- When you have created a self-signed certificate or have obtained one from a certificate authority.

Prerequisites

- Before running `encryptPasswords` to encrypt and store a new database password, make a backup copy of the `jdbc.properties` file, located in the `tools/bin` directory under your Marketing Platform installation.
- Before running `encryptPasswords` to encrypt and store the keystore password, you must have created or obtained a digital certificate and know the keystore password.

See “About Marketing Platform utilities” on page 81 for additional prerequisites.

Syntax

```
encryptPasswords -d databasePassword
```

```
encryptPasswords -k keystorePassword
```

Commands

-d *databasePassword*

Encrypt the database password.

-k *keystorePassword*

Encrypt the keystore password and store it in a file named `pfile`.

Examples

- When the Marketing Platform was installed, the login for the system table database account was set to myLogin. Now, some time after installation, you have changed the password for this account to newPassword. Run encryptPasswords as follows to encrypt and store the database password.

```
encryptPasswords -d newPassword
```

- You are configuring an IBM Unica Marketing application to use SSL and have created or obtained a digital certificate. Run encryptPasswords as follows to encrypt and store the keystore password.

```
encryptPasswords -k myPassword
```

The partitionTool utility

Partitions are associated with Campaign policies and roles. These policies and roles and their partition associations are stored in the Marketing Platform system tables. The partitionTool utility seeds the Marketing Platform system tables with basic policy and role information for partitions.

When to use partitionTool

For each partition you create, you must use partitionTool to seed the Marketing Platform system tables with basic policy and role information.

See the installation guide appropriate for your version of Campaign for detailed instructions on setting up multiple partitions in Campaign.

Special characters and spaces

Any partition description or user, group, or partition name that contains spaces must be enclosed in double quotation marks.

See “About Marketing Platform utilities” on page 81 for additional restrictions.

Syntax

```
partitionTool -c -s sourcePartition -n newPartitionName [-u  
admin_user_name] [-d partitionDescription] [-g groupName]
```

Commands

The following commands are available in the partitionTool utility.

-c

Replicates (clones) the policies and roles for an existing partition specified using the -s option, and uses the name specified using the -n option. Both of these options are required with c. This command does the following.

- Creates a new IBM Unica Marketing user with the Admin role in both the Administrative Roles policy and the global policy in Campaign. The partition name you specify is automatically set as this user’s password.
- Creates a new Marketing Platform group and makes the new Admin user a member of that group.
- Creates a new partition object.

- Replicates all the policies associated with the source partition and associates them with the new partition.
- For each replicated policy, replicates all roles associated with the policy.
- For each replicated role, maps all functions in the same way that they were mapped in the source role.
- Assigns the new Marketing Platform group to the last system-defined Admin role created during role replication. If you are cloning the default partition, `partition1`, this role is the default Administrative Role (Admin).

Options

-d *partitionDescription*

Optional, used with `-c` only. Specifies a description that appears in the output from the `-list` command. Must be 256 characters or less. Enclose in double quotation marks if the description contains spaces.

-g *groupName*

Optional, used with `-c` only. Specifies the name of the Marketing Platform Admin group that the utility creates. The name must be unique within this instance of the Marketing Platform

If not defined, the name defaults to `partition_nameAdminGroup`.

-n *partitionName*

Optional with `-list`, required with `-c`. Must be 32 characters or less.

When used with `-list`, specifies the partition whose information is listed.

When used with `-c`, specifies the name of the new partition, and the partition name you specify is used as the password for the Admin user. The partition name must match the name you gave the partition in when you configured it (using the partition template on the Configuration page).

-s *sourcePartition*

Required, used with `-c` only. The name of the source partition to be replicated.

-u *adminUserName*

Optional, used with `-c` only. Specifies the user name of the Admin user for the replicated partition. The name must be unique within this instance of the Marketing Platform.

If not defined, the name defaults to `partitionNameAdminUser`.

The partition name is automatically set as this user's password.

Examples

- Create a partition with the following characteristics.
 - Cloned from `partition1`
 - Partition name is `myPartition`

- Uses the default user name (myPartitionAdminUser) and password (myPartition)
- Uses the default group name (myPartitionAdminGroup)
- Description is "ClonedFromPartition1"

```
partitionTool -c -s partition1 -n myPartition -d "ClonedFromPartition1"
```

- Create a partition with the following characteristics.
 - Cloned from partition1
 - Partition name is partition2
 - Specifies user name of customerA with the automatically assigned password of partition2
 - Specifies group name of customerAGroup
 - Description is "PartitionForCustomerAGroup"

```
partitionTool -c -s partition1 -n partition2 -u customerA -g customerAGroup -d "PartitionForCustomerAGroup"
```

The populateDb utility

The populateDb utility inserts default (seed) data in the Marketing Platform system tables.

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 the installer to change the database, 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 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

The restoreAccess utility

The restoreAccess utility allows you to restore access to the Marketing Platform if all users with PlatformAdminRole privileges have been inadvertently locked out or if all ability to log in to the Marketing Platform has been lost.

When to use restoreAccess

You might want to use restoreAccess under the two circumstances described in this section.

PlatformAdminRole users disabled

It is possible that all users with PlatformAdminRole privileges in the Marketing Platform might become disabled in the system. Here is an example of how the platform_admin user account might become disabled. Suppose you have only one user with PlatformAdminRole privileges (the platform_admin user). Assume the Maximum failed login attempts allowed property in the **General | Password settings** category on the Configuration page is set to 3. Then suppose someone who is attempting to log in as platform_admin enters an incorrect password three times in a row. These failed login attempts cause the platform_admin account to become disabled in the system.

In that case, you can use restoreAccess to add a user with PlatformAdminRole privileges to the Marketing Platform system tables without accessing the web interface.

When you run restoreAccess in this way, the utility creates a user with the login name and password you specify, and with PlatformAdminRole privileges.

If the user login name you specify exists in the Marketing Platform as an internal user, that user's password is changed.

Only a user with the login name of PlatformAdmin and with PlatformAdminRole privileges can universally administer all dashboards. So if the platform_admin user is disabled and you create a user with restoreAccess, you should create a user with a login of platform_admin.

Improper configuration of Active Directory integration

If you implement Windows Active Directory integration with improper configuration and can no longer log in, use restoreAccess to restore the ability to log in.

When you run restoreAccess in this way, the utility changes the value of the Platform | Security | Login method property from Windows integrated login to Marketing Platform. This change allows you to log in with any user account that existed before you were locked out. You can optionally specify a new login name and password as well. You must restart the web application server on which the Marketing Platform is deployed if you use the restoreAccess utility in this way.

Password considerations

Note the following about passwords when you use restoreAccess.

- The restoreAccess utility does not support blank passwords, and does not enforce password rules.

- If you specify a user name that is in use, the utility resets the password for that user.

Syntax

```
restoreAccess -u loginName -p password
```

```
restoreAccess -r
```

Commands

-r

When used without the `-u loginName` option, reset the value of the Unica | Security | Login method property to Marketing Platform. Requires restart of the web application server to take effect.

When used with the `-u loginName` option, create a PlatformAdminRole user.

Options

-u *loginName*

Create a user with PlatformAdminRole privileges with the specified login name. Must be used with the `-p` option.

-p *password*

Specify the password for the user being created. Required with `-u`.

Examples

- Create a user with PlatformAdminRole privileges. The login name is tempUser and the password is tempPassword.

```
restoreAccess -u tempUser -p tempPassword
```
- Change the value of the login method to Unica Marketing Platform and create a user with PlatformAdminRole privileges. The login name is tempUser and the password is tempPassword.

```
restoreAccess -r -u tempUser -p tempPassword
```

The scheduler_console_client utility

Jobs configured in the IBM Unica Marketing Scheduler can be listed and kicked off by this utility, if they are set up to listen for a trigger.

What to do if SSL is enabled

When the Marketing Platform web application is configured to use SSL, the JVM used by the scheduler_console_client utility must use the same SSL certificate that is used by the web application server on which the Marketing Platform is deployed.

Take the following steps to import the SSL certificate

- Determine the location of the JRE used by the scheduler_console_client.
 - If JAVA_HOME is set as a system environment variable, the JRE it points to is the one used by the scheduler_console_client utility.

- If `JAVA_HOME` is not set as a system environment variable, the `scheduler_console_client` utility uses the JRE set either in the `setenv` script located in the `tools/bin` directory of your Marketing Platform installation, or on the command line.
- Import the SSL certificate used by the web application server on which the Marketing Platform is deployed to the JRE used by `scheduler_console_client`. The Sun JDK includes a program called `keytool` that you can use to import the certificate. Consult the Java documentation for complete details on using this program, or access the help by entering `-help` when you run the program.

If the certificates do not match, the Marketing Platform log file contains an error such as the following.

```
Caused by: sun.security.provider.certpath.SunCertPathBuilderException:
unable to find valid certification path to requested target
```

Prerequisites

The Marketing Platform must be installed, deployed, and running.

Syntax

```
scheduler_console_client -v -t trigger_name user_name
```

```
scheduler_console_client -s -t trigger_name user_name
```

Commands

-v

List the Scheduler jobs configured to listen for the specified trigger.

Must be used with the `-t` option.

-s

Execute the Scheduler jobs configured to listen for the specified trigger.

Must be used with the `-t` option.

Options

-t *trigger_name*

The name of the trigger, as configured in the Scheduler.

Example

- List jobs configured to listen for a trigger named `trigger1`.

```
scheduler_console_client -v -t trigger1
```
- Execute jobs configured to listen for a trigger named `trigger1`.

```
scheduler_console_client -s -t trigger1
```

The RCT script

Use this script to run the Response and Contact Tracker (RCT) and to determine whether it can successfully connect to the hosted mailing environment in IBM Unica Hosted Services.

This script is in the bin directory under your eMessage installation. The eMessage directory is a subdirectory in the Campaign directory.

In UNIX or Linux environments, run the script as `rct.sh`.

In Windows, run the script from the command line as `rct.bat`.

Syntax

```
rct [ start | stop | check ]
```

Commands

start

Start the RCT

stop

Stop the RCT

Options

check

Check the ability of the RCT to connect to IBM Unica Hosted Services.

Examples

- To start the RCT on Windows.
`rct.bat start`
- To stop the RCT on Windows.
`rct.bat stop`
- In a Linux environment, determine whether the RCT can connect to IBM Unica Hosted Services.
`rct.sh check`

If the RCT can successfully connect to IBM Unica Hosted Services, the output of this command might appear as follows.

```
C:/Unica/emessage/bin>rct check
Testing config and connectivity for partition partition1
Succeeded | Partition: partition1 - Hosted Services Account ID: asm_admin
```

The MKService_rct script

Use this script to add or remove the Response and Contact Tracker (RCT) as a service. Adding the RCT as a service restarts the RCT every time you restart the operating system of the machine where you have installed the RCT. Removing the RCT as a service prevents the RCT from restarting automatically.

This script is located in the bin directory under your eMessage installation.

In UNIX or Linux environments run `MKService_rct.sh`. with a user that has root permissions or permissions to create daemon processes.

In Windows, run the script from the command line as `MKService_rct.bat`.

Syntax

```
MKService_rct -install
```

```
MKService_rct -remove
```

Commands

-install

Add the RCT as a service

-remove

Remove the RCT service

Examples

- To add the RCT as a Windows service.
`MKService_rct.bat -install`
- To remove the RCT service on UNIX or Linux.
`MKService_rct.sh -remove`

Appendix B. Uninstalling IBM Unica products

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

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

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.

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 might be an incomplete installation if you later reinstall an IBM Unica product in the same location. After uninstalling a product, its database is not removed. The uninstaller only removes default files that get created during installation. Any file created or generated after installation is not removed.

To uninstall IBM Unica products

Follow these instructions to properly remove IBM Unica products from your system.

Note: 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. For example, stopping the Campaign or Optimize Listener services before 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).

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 to gather

Before you contact IBM Unica technical support, 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."

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 the installation directory for each application.

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>).

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