

# **Unica Fast Upgrade Guide**



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# Chapter 1. Unica Fast Upgrade

Contains the Fast Upgrade procedures for the Unica suite of products.

## Before you begin fast upgrade

### **Note:**

HCL Unica 12.1 products are license based, and user will need to configure required licenses with HCL Unica products to start using them.

HCL Unica v12.1 products require licenses to get started. Users are required to contact HCL Unica Sales team to access the HCL Licensing server. HCL Unica Sales team will provide the access to the required products through the HCL Licensing portal. After getting the access, users can contact the HCL Unica support team to know more on configuring licenses on production or non-production environment..

Read carefully the HCL Unica Licensing Guide to understand how to configure, register license server and follow license consumption.

1. The fast upgrade approach supports the HCL Unica products ( Unica Platform, Unica Campaign, Unica Optimize, Unica Plan, Unica Interact) upgrade 8.6.x version onwards.
2. While migrating the - Unica Platform, Unica Campaign, Unica Optimize, Unica Plan, Unica Interact - system database from source (the production / test) environment to 12.1.0 ( a clean environment) it is strongly recommended that you check if all the required constraints and indexes are migrated successfully. Any failures in this will cause the fast upgrade to fail.
3. System tables data migration from source (production / test) environment to 12.1.0 (a clean environment) should be done with help of your DBA.
4. This upgrade should be executed, verified and tested on the QA environment before executing on the production environment.
5. Stop v12.1.0 all product application services, Campaign listener, Optimize listener or any other running processes before proceeding with fast upgrade.

6. If you are planning to perform fast upgrade and add new products in the Unica suite including Unica Journey, Unica Centralized Offer Management, etc., you should perform fast upgrade first. After completing the base version upgrade to 12.1, perform a clean installation of these new products.

## High-level steps involved in the Fast Upgrade process

The Unica Fast upgrade process is introduced to help complete the upgrade process in a short time so that you encounter less downtime on your production environment. Also, Fast upgrade process will get executed on clean 12.1.0 environment, so users existing environment will remain untouched. **Please note** that the extension of script files on Windows operating system is ".bat", and on Unix operating systems, it is ".sh". When running scripts as suggested in this document, please choose the corresponding extension

### Installing a clean 12.1.0 environment

1. You must set up a clean 12.1.0 environment with the same products installed as in the old version.
2. You can setup a clean 12.1.0 environment either on the same hardware or a different hardware. We recommend that you setup a clean 12.1.0 environment on a different hardware. If installed on the same hardware you must configure the JVM memory options for the new environment and keep sufficient disk space, memory and CPU for the older versions as well as for the 12.1.0 version.
3. A clean 12.1.0 environment installation should be done with the stack combination used in the old version. For example, if your existing 8.6 version is installed on the RHEL operating system with the DB2 database, then a clean 12.1.0 should be installed on same operating system flavor and same database vendor. But, note that you must use the supported third party software - operating systems, application servers, database, and so on versions that 12.1.0 supports.
4. Ensure that the 12.1.0 application is up and running.

## Migrating the system database

The steps underneath are database specific, you may consult your DBA to complete them:

1. You must take a backup of the system tables from the old version.
2. You must also take a backup of the system tables from the 12.1.0 version.
3. Stop the clean installed 12.1.0 application.
4. Clean up the system tables of the 12.1.0 clean applications. This involves deleting all the tables, constraints, indexes, and so on from the system tables. Alternatively, you can create new database schemas to migrate system data from the old version to the 12.1.0 version.
5. Restore the database backup from the older version system tables to the 12.1.0 application system tables for all the required products into the respective database schema.

## Executing the Fast Upgrade

1. You must execute the Unica Platform upgrade process first. In case Unica Campaign is part of the installed suite then execute the Fast Upgrade for Unica Campaign. Only after that execute the other fast upgrades.
2. Contact Technical Support if you encounter errors in the Fast Upgrade process.

## Post Fast Upgrade

1. After completing the Fast Upgrade, you must execute the configuration steps for every product. Refer to the respective product section in this guide for details.
2. Perform a UAT on the upgraded environment. The old version can be shutdown once the UAT passes and the new 12.1.0 environment can then be used in production.

# Procedure: Fast upgrade Unica Platform

## Unica Platform pre-upgrade

Import the Unica Platform system tables backup from the old version to the system tables schema used in the clean 12.1.0 environment.

## Upgrading the Unica Platform database manually

If system DB is DB2, see the [Troubleshooting \(on page 88\)](#) section of this guide.

You should manually execute the following scripts provided in the table underneath on the Unica Platform database while upgrading from various base versions:

Version	SQL scripts to execute
8.6.x to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade86to8601/insert_new_8601_locales.sql (do not execute this script if upgrading from 8.6.0.1 onwards)</li> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade86to90/ManagerSchema_SqlServer_90upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade90to91/ManagerSchema_SqlServer_91upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade91to911/ManagerSchema_SqlServer_911upg.sql</li> </ul>

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_SqlServer_121upg.sql</li> </ul>
8.6.x to 12.1.0	<p><b>Oracle</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade86to8601/ insert_new_8601_locales.sql (do</li> </ul>

**not execute this script if upgrading  
from 8.6.0.1 onwards**

- <PLATFORM\_HOME>/db/upgrade86to90/  
ManagerSchema\_Oracle\_90upg.sql
- <PLATFORM\_HOME>/db/upgrade90to91/  
ManagerSchema\_Oracle\_91upg.sql
- <PLATFORM\_HOME>/  
db/upgrade91to911/  
ManagerSchema\_Oracle\_911upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
ManagerSchema\_Oracle\_10upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
Oracle\_QRTZ\_Scheduler\_10\_upgrade\_Script.sql
- <PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_Oracle\_10002upg.sql
- <PLATFORM\_HOME>/db/  
upgrade10002to101/  
ManagerSchema\_Oracle\_101upg.sql
- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_Oracle\_11upg.sql
- <PLATFORM\_HOME>/db/  
upgrade1101to111/  
ManagerSchema\_Oracle\_111upg.sql
- <PLATFORM\_HOME>/db/  
upgrade111to11102/  
ManagerSchema\_Oracle\_11102upg.sql



	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_Oracle_121upg.sql</li> </ul>
8.6.x to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade86to8601/ insert_new_8601_locales.sql (do not execute this script if upgrading from 8.6.0.1 onwards</li> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade86to90/ ManagerSchema_DB2_90upg.sql</li> </ul> <p>OR if Unicode environment execute: &lt;PLATFORM_HOME&gt;/db/upgrade86to90/ ManagerSchema_DB2_90upg_unicode.sql</p> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade86to90/ db2_unicode_fix_90.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade90to91/ ManagerSchema_DB2_91upg.sql</li> </ul> <p>Or if Unicode environment execute: &lt;PLATFORM_HOME&gt;/db/upgrade90to91/ ManagerSchema_DB2_91upg_unicode.sql</p>

- <PLATFORM\_HOME>/  
db/upgrade91to911/  
ManagerSchema\_DB2\_911upg.sql

**Or if Unicode environment execute:**

<PLATFORM\_HOME>/db/ upgrade91to911/  
ManagerSchema\_DB2\_911upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/upgrade912to10/  
DB2\_QRTZ\_Scheduler\_10\_upggrade\_Script.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
ManagerSchema\_DB2\_10upg.sql

**Or if Unicode environment execute:**

<PLATFORM\_HOME>/db/upgrade912to10/  
ManagerSchema\_DB2\_10upg\_unicode.sql

- <PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg.sql

**Or if Unicode environment execute:**

<PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg\_unicode.sql

- <PLATFORM\_HOME>/db/  
upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

**Or if Unicode environment execute:**

```
<PLATFORM_HOME>/db/  
upgrade10002to101/  
ManagerSchema_DB2_101upg_unicode.sql
```

- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_DB2\_11upg.sql

**Or if Unicode environment execute:**

```
<PLATFORM_HOME>/db/ upgrade101to11/  
ManagerSchema_DB2_11upg_unicode.sql
```

- <PLATFORM\_HOME>/db/  
upgrade1101to111/  
ManagerSchema\_DB2\_111upg.sql
- <PLATFORM\_HOME>/db/  
upgrade111to11102/  
ManagerSchema\_DB2\_11102upg.sql
- <PLATFORM\_HOME>/db/  
upgrade11102to12/  
ManagerSchema\_DB2\_12upg.sql
- <PLATFORM\_HOME>/  
db/upgrade12to121/  
ManagerSchema\_DB2\_121upg.sql

**Or if Unicode environment execute:**

- <PLATFORM\_HOME>/db/  
upgrade11102to12/  
ManagerSchema\_DB2\_12upg\_unicode.sql

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li> </ul>
9.0.x to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/upgrade90to91/ ManagerSchema_SqlServer_91upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade91to911/ ManagerSchema_SqlServer_911upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li> </ul>

	<ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/db/ upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_SqlServer_121upg.sql</li></ul>
9.0.x to 12.1.0	<b>Oracle</b> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade90to91/ ManagerSchema_Oracle_91upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade91to911/ ManagerSchema_Oracle_911upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql</li><li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql</li></ul>

	<ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_Oracle_11102upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_Oracle_121upg.sql</li></ul>
9.0.x to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade90to91/ ManagerSchema_DB2_91upg.sql</li></ul> <p>OR if Unicode environment execute: &lt;PLATFORM_HOME&gt;/db/upgrade90to91/ ManagerSchema_DB2_91upg_unicode.sql</p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade91to911/ ManagerSchema_DB2_911upg.sql</li></ul> <p>OR if Unicode environment execute: &lt;PLATFORM_HOME&gt;/db/ upgrade91to911/ ManagerSchema_DB2_911upg_unicode.sql</p>

- <PLATFORM\_HOME>/  
db/upgrade912to10/  
DB2\_QRTZ\_Scheduler\_10\_upggrade\_Script.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
ManagerSchema\_DB2\_10upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/upgrade912to10/  
ManagerSchema\_DB2\_10upg\_unicode.sql

- <PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg\_unicode.sql

	<ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_DB2_11upg.sql</li></ul> <p>OR if Unicode environment execute:</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql</p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_DB2_111upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_DB2_11102upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</li></ul> <p>Or if Unicode environment execute:</p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li></ul>
9.1.x to 12.1.0	<b>SQL Server</b>



- <PLATFORM\_HOME>/  
db/upgrade91to911/  
ManagerSchema\_SqlServer\_911upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
ManagerSchema\_SqlServer\_10upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
SqlServer\_QRTZ\_Scheduler\_10\_upgrade\_Script.sql
- <PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_SqlServer\_10002upg.sql
- <PLATFORM\_HOME>/  
db/upgrade10002to101/  
ManagerSchema\_SqlServer\_101upg.sql
- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_SqlServer\_11upg.sql
- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_SqlServer\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_SqlServer\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_SqlServer\_12upg.sql
- <PLATFORM\_HOME>/  
db/upgrade12to121/  
ManagerSchema\_SqlServer\_121upg.sql

9.1.x to 12.1.0

**Oracle**

- <PLATFORM\_HOME>/  
db/upgrade91to911/  
ManagerSchema\_Oracle\_911upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
ManagerSchema\_Oracle\_10upg.sql
- <PLATFORM\_HOME>/  
db/upgrade912to10/  
Oracle\_QRTZ\_Scheduler\_10\_upgrade\_Script.sql
- <PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_Oracle\_10002upg.sql
- <PLATFORM\_HOME>/  
db/upgrade10002to101/  
ManagerSchema\_Oracle\_101upg.sql
- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_Oracle\_11upg.sql
- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_Oracle\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_Oracle\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_Oracle\_12upg.sql
- <PLATFORM\_HOME>/  
db/ upgrade12to121/  
ManagerSchema\_Oracle\_121upg\_unicode.sql

9.1.x to 12.1.0

**DB2**

<PLATFORM\_HOME>/db/upgrade91to911/  
ManagerSchema\_DB2\_911upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/ upgrade91to911/  
ManagerSchema\_DB2\_911upg\_unicode.sql

<PLATFORM\_HOME>/db/upgrade912to10/  
DB2\_QRTZ\_Scheduler\_10\_upggrade\_Script.sql

<PLATFORM\_HOME>/db/upgrade912to10/  
ManagerSchema\_DB2\_10upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/upgrade912to10/  
ManagerSchema\_DB2\_10upg\_unicode.sql

<PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg\_unicode.sql

<PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg\_unicode.sql

	<p>&lt;PLATFORM_HOME&gt;/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql</p> <p>OR if Unicode environment execute:</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql</p> <p>&lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_DB2_11102upg.sql</p> <p>&lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg.sql</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</p> <p>OR if Unicode environment execute:</p> <p>&lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</p>
9.1.1.x to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql</li> </ul>

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_SqlServer_121upg_unicode.sql</li> </ul>
9.1.1.x to 12.1.0	<p><b>Oracle</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql</li> </ul>

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_Oracle_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_Oracle_121upg_unicode.sql</li> </ul>
9.1.1.x to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ DB2_QRTZ_Scheduler_10_upggrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_DB2_10upg.sql</li> </ul> <p>OR if Unicode environment execute:</p> <p>&lt;PLATFORM_HOME&gt;/db/upgrade912to10/ ManagerSchema_DB2_10upg_unicode.sql</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql</li> </ul>

OR if Unicode environment execute:

```
<PLATFORM_HOME>/db/  
upgrade10001to10002/  
ManagerSchema_DB2_10002upg_unicode.sql
```

- <PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

OR if Unicode environment execute:

```
<PLATFORM_HOME>/  
db/ upgrade10002to101/  
ManagerSchema_DB2_101upg_unicode.sql
```

- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_DB2\_11upg.sql

OR if Unicode environment execute:

- <PLATFORM\_HOME>/  
db/ upgrade101to11/  
ManagerSchema\_DB2\_11upg\_unicode.sql
- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_DB2\_111upg.sql

```
<PLATFORM_HOME>/  
db/upgrade111to11102/  
ManagerSchema_DB2_11102upg.sql
```

	<p>&lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg.sql</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</p> <p>OR if Unicode environment execute:</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li> </ul>
9.1.2.x to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li> </ul>



	<ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_SqlServer_121upg_unicode.sql</li></ul>
9.1.2.x to 12.1.0	<p><b>Oracle</b></p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql</li><li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql</li></ul>

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_Oracle_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_Oracle_121upg_unicode.sql</li> </ul>
9.1.2.x to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ DB2_QRTZ_Scheduler_10_upggrade_Script.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade912to10/ ManagerSchema_DB2_10upg.sql</li> </ul> <p>OR if Unicode environment execute: &lt;PLATFORM_HOME&gt;/db/upgrade912to10/ ManagerSchema_DB2_10upg_unicode.sql</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql</li> </ul> <p>OR if Unicode environment execute:</p>

<PLATFORM\_HOME>/db/  
upgrade10001to10002/  
ManagerSchema\_DB2\_10002upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_DB2\_11upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/ upgrade101to11/  
ManagerSchema\_DB2\_11upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_DB2\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_DB2\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_DB2\_12upg.sql

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</li> </ul> <p>Or if Unicode environment execute:</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li> </ul>
10.0.x to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li> </ul>

	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li> </ul>
10.0.x to 12.1.0	<p><b>Oracle</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_Oracle_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_Oracle_121upg_unicode.sql</li> </ul>
10.0.x to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/db/ upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql</li> </ul>

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/

upgrade10001to10002/

ManagerSchema\_DB2\_10002upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/ upgrade10002to101/  
ManagerSchema\_DB2\_101upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/

db/ upgrade10002to101/

ManagerSchema\_DB2\_101upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/upgrade101to11/  
ManagerSchema\_DB2\_11upg.sql

OR if Unicode environment execute:

<PLATFORM\_HOME>/db/ upgrade101to11/

ManagerSchema\_DB2\_11upg\_unicode.sql

- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_DB2\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_DB2\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_DB2\_12upg.sql

	<ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</li></ul> <p>OR if Unicode environment execute:</p> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li></ul>
10.1.0 to 12.1.0	<b>SQL Server</b> <ul style="list-style-type: none"><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li><li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_SqlServer_121upg_unicode.sql</li></ul>

10.1.0 to 12.1.0	<p><b>Oracle</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_Oracle_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_Oracle_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_Oracle_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_Oracle_121upg_unicode.sql</li> </ul>
10.1.0 to 12.1.0	<p><b>DB2</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade101to11/ ManagerSchema_DB2_11upg.sql</li> </ul> <p>OR if Unicode environment execute:</p> <p>&lt;PLATFORM_HOME&gt;/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_DB2_111upg.sql</li> </ul>



	<ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_DB2_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg.sql</li> </ul> <p>Or if a Unicode environment execute:</p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_DB2_12upg_unicode.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/ upgrade12to121/ ManagerSchema_DB2_121upg_unicode.sql</li> </ul>
11.0 to 12.1.0	Does not require execution of any scripts
11.0.1 to 12.1.0	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade1101to111/ ManagerSchema_SqlServer_111upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade111to11102/ ManagerSchema_SqlServer_11102upg.sql</li> <li>• &lt;PLATFORM_HOME&gt;/ db/upgrade11102to12/ ManagerSchema_SqlServer_12upg.sql</li> </ul>

- <PLATFORM\_HOME>/  
db/ upgrade12to121/  
ManagerSchema\_SqlServer\_121upg\_unicode.sql

### **Oracle**

- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_Oracle\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_SqlServer\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_SqlServer\_12upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_Oracle\_11102upg.sql
- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_Oracle\_12upg.sql
- <PLATFORM\_HOME>/  
db/ upgrade12to121/  
ManagerSchema\_DB2\_121upg.sql

### **DB2**

- <PLATFORM\_HOME>/  
db/upgrade1101to111/  
ManagerSchema\_DB2\_111upg.sql
- <PLATFORM\_HOME>/  
db/upgrade111to11102/  
ManagerSchema\_DB2\_11102upg.sql

- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_DB2\_12upg.sql
- <PLATFORM\_HOME>/  
db/ upgrade12to121/  
ManagerSchema\_DB2\_121upg.sql

Or if a unicode environment execute

- <PLATFORM\_HOME>/  
db/upgrade11102to12/  
ManagerSchema\_DB2\_12upg\_unicode.sql
- <PLATFORM\_HOME>/  
db/ upgrade12to121/  
ManagerSchema\_DB2\_121upg\_unicode.sql

## Updating the JDBC files in Unica Platform

In case you do not want to reuse the Platform schema used for a 12.1.0 clean installation and want to use another user schema, perform the following steps.

1. Export the version configuration using the following command on clean 12.1 environment.

```
./configTool.sh -x -p "Affinium|Manager|about" -f "<PLATFORM_HOME>/conf/about.xml"
```

2. Take a back up the jdbc.properties file from the 12.1.0 environment (Platform/tools/bin/jdbc.properties). Update the username in the 12.1.0 platform system database / schema name in jdbc.properties file.

Example of jdbc.properties:

```
uasm.jdbc_driver=com.ibm.db2.jcc.DB2Driver
```

```
uasm.data_source=jdbc:db2://<DB_HOST>:<DB_PORT>/<DB2_SID>
```

```
uasm.data_source_login=<PLATFORM_DB_SCHEMA>
```

```
uasm.data_source_password=ENC(T+rSrWP41Vqu8SoDARMhDdWkf0dFB0Zc)
```

```
hibernate.dialect=org.hibernate.dialect.DB2Dialect
```

3. To update the encrypted password in the jdbc.properties file run the following command: Navigate to Platform/tools/bin directory and execute the below command:

```
./encryptPasswords.sh -d <PLATFORM_DB_USER_PASSWORD>
```

This will update the encrypted password in the jdbc.properties file. Save the Platform/tools/bin/jdbc.properties with this encrypted password of the new schema user.

4. In the application server, update the JNDI details (schema / SID, userid, password) for Platform JNDI as per the new database schema used with v12.1.0 environment.

## Upgrading the Unica Platform configuration

1. Execute the following command to upgrade Unica Platform configurations to 12.1.0:

Navigate to `<UNICA_PLATFORM_HOME>/tools/bin` directory

Execute command:

```
./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/Manager_config.xml"
```

**Note:** You may encounter an insertion of duplicate key related error or `com.ibm.db2.jcc.am.SqlIntegrityConstraintViolationException`:

See the [Troubleshooting \(on page 88\)](#) section.

2. Execute the command: `./populateDb.sh -n Manager`

3. Execute the command:

```
./configTool.sh -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>/conf/watsonAssistant_navigation.xml"
```

4. Execute the command: `./alertConfigTool.sh -i -f "<UNICA_PLATFORM_HOME>/conf/Platform_alerts_configuration.xml"`

Note: If upgrading from version 11.0.1, then do not execute the below scripts(step 5,6,7).

5. Execute the command: `./configTool.sh -vp -p "Affinium|Report|integrations" -f "<UNICA_PLATFORM_HOME>/conf/upgrade101to11/cognos11_integration.xml"`

Note: If upgrading from version 8.6.0, execute steps 6 and 7.

6. Execute the command: `upgrade86to90`(Only Upgrading from version 8.6.0)
7. Execute the command: `upgrade90to91`(Only Upgrading from version 9.0)
8. Upgrade the scheduler jobs.

Use the `quartzjobtool` to update scheduler jobs. This is a required step. If this upgrade tool is not run, any existing scheduled job fails to start. The `quartzjobtool` is in the `tools\bin` directory under Unica Platform installation. Run this utility from the `tools\bin` directory.

Example command (Windows): `quartzjobtool.bat`

Example command (Unix): `./quartzjobtool.sh`

9. For Unica Insights users, execute the following command.

```
configTool -vp -p "Affinium" -f <Insights.xml directory_path>/Insights.xml(Insights.xml
directory_path : /opt/HCL/Unica_12/Platform/Insights/conf)
```

If you are upgrading from version 12.0 and Birt is installed, do not run `Insights.xml` as it is handled by `populateDb` utility.

10. Execute the command:

```
./configTool.sh -vp -p "Affinium|suite|security" -f "/
<UNICA_PLATFORM_HOME>/conf/upgrade12to121/APISecurity.xml "
```

11. Execute the command for Deliver:

```
./configTool.sh -vp -p "Affinium|suite|security|apiSecurity"
-f "<UNICA_PLATFORM_HOME>/Platform/conf/upgrade12to121/
APISecurity_Deliver.xml "
```

## 12. Execute the following command for Licensing:

```
./configTool.sh -vp -p "Affinium|suite|uiNavigation|settingsMenu" -f
"<UNICA_PLATFORM_HOME>/conf/upgrade12to121/LicenseDeatilsNavigation.xml "
```

## Setting the Unica Platform – Help About > Version

1. Import the about.xml edited file using the following command: `./configTool.sh -v -i -o -p "Affinium|Manager" -f <PLATFORM_HOME>/conf/about.xml`.
2. Edit the exported about.xml.

```
<property id="xxxxxxx" name="releaseNumber" type="string_property"
width="40">
<value>12.1.0.0.GA_BUILD</value>
</property>
```

## Unica Platform post-upgrade

1. Unica Platform application navigation URL points to the old base environment. You must change the navigation URL using the SQL script from the Platform system database.
2. The URL of the start page that appears when each users log in to HCL Unica products has to be changed manually from the **USM\_PERSONALIZATION** table.
3. Check the following properties files from the source and destination Environment. Copy all the urls mentioned in the respective properties files from source to destination files.
  - 1.Platform\_Admin\_URL.properties
  - 2.Platform\_Admin\_View\_Priv.properties
  - 3.Platform\_Admin\_URL.properties
  - 4.Platform\_Admin\_Scheduler\_Scripts.properties

5.Platform\_Admin\_Scheduler\_API.properties

4. Perform UAT on Unica Platform application. Make sure all the functions are working correctly.
5. If you configure Platform login method different than Platform login method, ensure that it is correctly configured and creating the expected number of users. Then you can proceed to next step and register licenses on your production server.

## Procedure: Fast upgrade Unica Campaign

### Unica Campaign pre-upgrade

1. Import the Unica Campaign system tables backup from the old / base version to the system tables schema used in the clean 12.1 environment.
2. Take a File system backup of the `CAMPAIGN_HOME/partitions/partition1` directory.
3. Copy all the partitions data from the old environment's partition folders to the clean 12.1 environment Unica Campaign partition folder.

### Upgrading Unica Campaign

1. Update the `setenv.sh` file the with required values for the Unica Campaign upgrade. For details on environment variables in the `setenv.sh` file, refer to the Unica Campaign 12.1 Upgrade guide.

- a. Navigate to the path: `<installation path>/Campaign/tools/upgrade/11.1.0+to12.1/`

Set the following variables in the `setenv.sh` file:

Set `JAVA_HOME='<Installation Path >/jre'`

Set `CAMPAIGN_HOME='<Installation Path>/Campaign'`

**Set** LOG\_TEMP\_DIR='<Installation Path>/Campaign/logs'

**Set** JDBC\_DRIVER\_CLASSPATH=<JDBC DRIVER CLASSPATH>


b. Add the JVM Option "-DFAST\_UPGRADE\_VERSION=<BASE\_VERSION>"

For example:

```
JAVA_OPTIONS="$ {JAVA_OPTIONS} -DFAST_UPGRADE_VERSION=8.6.x
```

c. Supported versions in fast upgrade:

Upgrade from Version	JVM Option
8.6.x	-DFAST_UPGRADE_VERSION=8.6.x
9.0.x	-DFAST_UPGRADE_VERSION=9.0.x
9.1.x.x (9.1.x, 9.1.1.x and 9.1.2.x)	-DFAST_UPGRADE_VERSION=9.1.x
10.0.x	-DFAST_UPGRADE_VERSION=10.0.x
10.1.x	-DFAST_UPGRADE_VERSION=10.1.x
11.0.x	-DFAST_UPGRADE_VERSION=11.0.x
11.0.1	-DFAST_UPGRADE_VERSION=11.0.1.x
11.1	-DFAST_UPGRADE_VERSION=11.1.x

 **Note:** If upgrading Campaign from V 9.0 or older versions, then first drop index cTreatment\_IX1 on tabel UA\_Treatment before starting fast upgrade process.

2. Pre-requisite to complete before running the Unica Campaign upgrade tool: The <CAMPAIGN\_HOME>/install directory "jdbc.properties" file contains the correct JDBC URL, Platform system database userID and encrypted password. User will need to copy paste jdbc.properties file from Platform/tools/bin directory to Campaign/install directory. If this information is incorrect Campaign upgrade tool will fail with database authentication related errors.
3. Execute Campaign "acUpgradeTool.sh". This Upgrade tool execution is similar to the usual acUpgradeTool execution. During the upgrade tool execution when prompted for



"select base version to upgrade", you can see the upgrade version specified with the JVM option "-DFAST\_UPGRADE\_VERSION=<BASE\_VERSION>". Select the fast upgrade base version to upgrade from.

4. Updating the JDBC files in Unica Campaign: In the application server, update the JNDI details (schema / SID, userid, password) for Campaign JNDI as per the new database schema used with v12.1 environment.

## Campaign post-upgrade

### Setting the Campaign – Help About > Version

1. Change the Unica Campaign version in the Unica Platform registration:

- a. Export the version configuration using the following command on clean 12.1 environment:
 

```
./configTool.sh -x -p "Affinium|Campaign|about" -f <PLATFORM_HOME>/conf/campaign_about.xml
```
- b. Edit the campaign\_about.xml file generated by the above command. Change the version to 12.1.0.0.GA\_BUILD".<GA\_BUILD>. Replace this with build number referring to version.txt from installation location.

```
<property id="xxxxxxx" name="releaseNumber" type="string_property"
width="40">
<value>12.1.0.0.GA_BUILD</value>
</property>
```

- c. Import the above edited file using the following command:
 

```
./configTool.sh -v -i -o -p "Affinium|Campaign" -f <PLATFORM_HOME>/Platform/conf/campaign_about.xml
```

2. Execute the following command to upgrade Campaign Security Policies from the base version to version 12.1 and navigate to `<Platform_Home/tools/bin>`.

```
./populateDb.sh -n Campaign
```

## Unica Campaign configuration changes

### 1. Campaign "Campaign REST API Filter" registration:

- a. Navigate to the PLATFORM\_HOME/tools/bin directory.
- b. Execute the following commands:
 

```
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_Filter.xml"
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_V2_Filter.xml"
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_V3_Filter.xml"
```

### 2. Campaign "Engage REST API" registration:

- a. Navigate to the PLATFORM\_HOME/tools/bin directory.
- b. Execute the following command:
 

```
./configTool.sh -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <CAMPAIGN_HOME>/conf/Engage_API_Filter.xml
```

### 3. Campaign struts Related Changes

In the upgrade MVC framework from Struts 1.3.8 to Spring 5.1.18, to fix Security vulnerability (in Struts 1.3.8) and to move to the current industry standard has caused changes in the extension of some of the urls mentioned in the configuration from ".do" to ".go". The following commands need to be executed to bring it to effect.

- a. campaign\_navigation\_optimize\_spring\_update.xml
- b. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Optimize" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_optimize\_spring\_update.xml
- c. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Offers" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_allOffers\_spring\_update.xml
- d. configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_doLogout\_spring\_update.xml

- e. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Segments" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_allSegments\_spring\_update.xml
- f. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Sessions" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_allSessions\_spring\_update.xml
- g. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Campaigns" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_allCampaigns\_spring\_update.xml
- h. configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_ext\_doLogout\_spring\_update.xml
- i. configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_offerDetails\_spring\_update.xml
- j. configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Monitoring Console" -f <CAMPAIGN\_HOME>/conf/campaign\_navigation\_monitoring\_console\_spring\_update.xml
- k. configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_displayOfferList\_spring\_update.xml
- l. configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_flowchartDetails\_spring\_update.xml
- m. configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_ext\_runOptimizeSession\_spring\_update.xml
- n. configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_ext\_stopOptimizeSessionRun\_spring\_update.xml
- o. configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_ext\_optimizeSessionProgress\_spring\_update.xml
- p. configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN\_HOME>/conf/campaign\_configuration\_optimize\_sessionLinkClicked\_spring\_update.xml

q. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_optimize_editOptimizeSchedule_spring_update.xml`

#### 4. Change Campaign configurations in the Unica Platform configuration:

- a. Change the Campaign navigation URLs.
- b. Change the "serverHost" under Settings for 'unicaACLlistener'(Affinium|Campaign|unicaACLlistener).
- c. Change DSN under UA\_SYSTEM\_TABLES if required.
- d. Change the JNDI name under UA\_SYSTEM\_TABLES if required.
- e. Remap all system tables in the Campaign table mapping. This can be done using the following steps:
  1. Stop the listener.
  2. Remove "unica\_tblcache.mgr" from <CAMPAIGN\_HOME>/partitions/partition/conf.
  3. Start the listener.
  4. Navigate to Campaign settings > Table mapping.

#### 5. Platform – DBResourceBundle: The steps underneath will import resource bundles in Unica Platform. Execute the script underneath as specified:

- a. Navigate to <platform\_home>/tools/bin
- b. `DBResourceBundle.sh /bat -P Campaign -F <Campaign_home>/resourcebundles`

### Unica Campaign post-upgrade functional check

1. The Unica Campaign application navigation URL points to the old base environment. You must change this navigation URL to point to the target environment using the SQL script in the Unica Platform system database.
2. Perform UAT on Unica Campaign application. Ensure that all the flowchart are opening and the run is successful.

## Configuring Unica Insights reports with Campaign

Complete the following steps.

1. Import Campaign Reports schemas in Platform configuration.
2. Run the following commands. Navigate to `Platform_HOME/tools/bin` directory.

```
configTool -v -i -o -p "Affinium|Report|about" -f "<CAMPAIGN_HOME>/
reports/schema/config_version.xml "

configTool -v -i -o -p "Affinium|Report|schemas" -f "<CAMPAIGN_HOME>/
reports/schema/config_schemas_Campaign.xml "

configTool -v -i -o -p "Affinium|Report|schemas|
Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/
camp_cust_attributes_template.xml "

configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/templates/camp_performance_template.xml "

configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/templates/offer_performance_template.xml "

configTool -v -i -o -p "Affinium|Report|schemas|
Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/
camp_offer_response_breakout_template.xml "

configTool -v -i -o -p "Affinium|Report|schemas|
Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/
camp_offer_contact_status_breakout_template.xml "

configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/base/camp_view.xml "

ConfigTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/custom/camp_cust_attributes.xml "

configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/custom/camp_offer_response_breakout.xml "
```

```
configTool -v -i -o -p "Affinium|Report|schemas|
Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/
camp_offer_contact_status_breakout.xml "
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/custom/camp_performance.xml "
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f
"<CAMPAIGN_HOME>/reports/schema/custom/offer_performance.xml "
```

### 3. Update Campaign data source in Unica Insights report design files using Unica Insights utility.

```
InsightsDBUtil -ds=CampaignDS -bPath="<Platform_Home>/Insights/Reports"
-DBType=<databasetype> -URL=<databasetype> -user=<database user> -
pwd=<database password>
```

### 4. For Reports pack configurations, see the Unica Insights Reports Installation and Configuration guide.

## Procedure: Fast upgrade Unica Optimize

1. Optimize system tables are migrated while migrating Campaign system tables
2. Copy Optimize old session data from source environment to 12.1 environment:
  - a. Copy Optimize/partitions/partition1/reports content into Campaign/partitions/partition1/reports directory. You will need to repeat this steps for each partition.
  - b. Copy Optimize/partitions/partition1/logs content into Campaign/partitions/partition1/logs directory.
  - c. Repeat the above steps for each partition.
3. This step is not applicable to Fast Upgrade from version 11.0 to version 12.1. Execute following script on Unica Campaign 12.1 system database:
  - a. Execute following script on Unica Campaign 12.1 system database:

### 8.0 Updates

**Oracle:**

```
ALTER TABLE UACO_OptSession MODIFY CustomSettingsXML VARCHAR(4000);
```

**SQL:**

```
ALTER TABLE UACO_OptSession MODIFY CustomSettingsXML VARCHAR(4000);
```

**DB2:**

```
ALTER TABLE UACO_OptSession ALTER COLUMN CustomSettingsXML SET DATA  
TYPE VARCHAR(4000);
```

**-- 9.0 Updates --**

```
ALTER TABLE UACO_OptSession ADD AgentChannelName VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD AgentInfoTemplateTable VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD AgentCustomerRelTemplateTable  
VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD CustomSettingsFlag int;
```

```
ALTER TABLE UACO_OptSession ADD CustomSettingsXML VARCHAR(4000);
```

```
ALTER TABLE UACO_OptSession ADD LastRunType VARCHAR(192);
```

```
UPDATE UACO_OptSession SET LastRunType = 'Production Run';
```

**Execute the following step only if you are using DB2 database for system tables.**

```
CALL SYSPROC.ADMIN_CMD ('REORG TABLE UACO_OptSession');
```

**-- 9.1.1 Updates --**

```
ALTER TABLE UACO_OptSession ADD AgentChannelName VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD AgentInfoTemplateTable VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD AgentCustomerRelTemplateTable  
VARCHAR(192);
```

```
ALTER TABLE UACO_OptSession ADD LastRunType VARCHAR(192);
```

```
UPDATE UACO_OptSession SET LastRunType = 'Production Run';
```

**-- 10.0 Updates --**

< No script needed >

-- 10.1 Updates --

< No script needed >

-- 11.0 Updates --

< No script needed >

- b. Do not perform the following step if you are upgrading from prior 12.0 version. Execute the script that resides at the following location on the Unica Campaign 12.1 system database:

```
<CAMPAIGN_HOME>/ddl/aco_extra_indexes_<db>.sql
```


## Setting the Unica Optimize Configurations

Change Unica Campaign configurations in the Unica Platform configuration:

- a. Change the "serverHost" in the Settings of 'unicaACOListener'(Affinium|Campaign|unicaACOListener)
- b. Remap all the system tables in the Unica Campaign table mapping. This can be done using following the steps:
  - Stop the listener.
  - Remove "unica\_tblcache.mgr" from <CAMPAIGN\_HOME>/partitions/partition/conf.
  - Start the listener.
  - Navigate to **Unica Campaign settings > Table mapping**.

## Optimize post-upgrade functional check

Perform UAT on Optimize application. Ensure that all the sessions are opening and the run is successful.

 **Note:** For versions 12.0 and higher, to execute Optimize sessions, users are required to apply for licenses. For more details, contact the HCL Support or Sales team.



# Procedure: Fast upgrade Unica Deliver

To perform the fast upgrade of Unica Deliver, complete the following steps.

1. Open a command prompt and navigate to `<PLATFORM_HOME>/tools/bin` and execute the following commands.

- `configTool.bat / sh -u eMessage`
- `configTool.bat / sh -d -p "Affinium|Campaign|partitions|partition1|server|internal|eMessageInstalled" -o`
- `configTool.bat / sh -d -p "Affinium|Campaign|partitions|partition1|eMessage" -o`
- `configTool.bat / sh -r Deliver -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_configuration.xml"`
- `configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_op_odsettings_navigation.xml"`
- `configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_op_mailings_navigation.xml"`
- `configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_op_documents_navigation.xml"`
- `configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_op_analytics_navigation.xml"`
- `configTool.bat/sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>/Deliver/conf/deliver_op_new_documents_navigation.xml"`

2. Log in to Platform and navigate to **Settings > Configuration**.

3. Navigate to `Affinium|Campaign|partitions|partition1|Deliver` and provide value for `deliverPluginJarFile` as following.

```
deliverPluginJarFile <CAMPAIGN_HOME>/Deliver/plugin/deliverplugin.jar
```

4. Navigate to `Affinium|Campaign|partitions|partition1|server|internal` and enable `DeliverInstalled= yes`.

5. Navigate to `Affinium|Deliver|partitions|partition1|dataSources|systemTables` and configure `systemTables` properties as per your Campaign schema.

6. Assign `UNICA_HOSTED_SERVICES` datasource to `asm_admin` user with appropriate account and its password.

Ensure to take a backup of Campaign system table schema before executing the next steps.

7. Navigate to `<CAMPAIGN_HOME>\Deliver\ddl` and execute

`ace_op_drop_systab_ora.sql`, if you possess Oracle Campaign system schema, else execute `ace_op_drop_systab.sql` on Campaign system schema.

8. Navigate to `<CAMPAIGN_HOME>\Deliver\ddl\unicode` and execute

`ace_op_systab_<DB_TYPE>.sql` on Campaign system schema.

9. Navigate to `<CAMPAIGN_HOME>\Deliver\ddl` and execute

`ace_op_populate_systab_<DB_TYPE>.sql` on Campaign system schema.


10. Restart web app server and listener.

## Procedure: Fast upgrade Unica Interact

Complete the prerequisites to upgrade from Unica Interact 8.6.x/later version to Unica Interact 12.1.

1. Ensure that Unica Platform and Unica Campaign are upgraded successfully on the target setup. Install Interact 12.1 on the setup.

2. Take a backup for source system Databases InteractDT, InteractRT, Interact Learning, Interact prod.
3. Make sure that the Interact related files in Campaign's 'partition' folder are copied from the source system to the target system.
4. Restore the backed up database schema on target system.
5. Create data sources on the target application server and point to the new database schema. You can use the same JNDI names as those in the source system to save effort in doing manual changes.

 **Note:** Ensure that you keep the same target schema names as base setup schema names.

## Upgrading Interact DT

1. Update setenv.sh with the values required for upgrade. For details on the environment variables in the setenv.sh file, see the Interact Upgrade guide.
  - a. Navigate to the path: `<Interact_Home>/interactDT/tools/upgrade/` and set the following variables in the setenv.sh file:
 

```
set JAVA_HOME='<Installation Path >/jre'.

set JDBC_DRIVER_CP=Actual location of the databasedriver along with database driver


For example: set JDBC_DRIVER_CP=/opt/HCL/FastUpgrade12/ojdbc8.jar

set JDBC_DRIVER_CLASS=Datasase driver

set JDBC_DRIVER_URL=Database URL
```
  - b. Change the log file name and location if required.
  - c. Navigate to `<Interact_Home>\interactDT\tools\upgrade\conf.`

d. Edit file `ACIUpgradeTaskList.properties` and change the value of

`CHOICES_FOR_PREVIOUS_VERSIONS=8.6.x` or other base version you are upgrading from.

 **Note:** If `CHOICES_FOR_PREVIOUS_VERSIONS` is already present that you are upgrading from, then do not change in the value.

For `setenv.sh`, you must update the username to the actual user who runs the tool.

For example: you are required to update this entry - `$whoami != "root"` to `$whoami != "username"`

Here is the list of supported choices for previous version selection. Users can select the relevant one.

- 8.6.x
- 9.0.x
- 9.1.0
- 9.1.1
- 9.1.2
- 10.0.0
- 10.1.0
- 11.0.1
- 11.1.0
- 12.0.0
- 12.1.0

2. Complete the prerequisites before running the Interact upgrade tool.

Update the `jdbc.properties` file under:

```
<Installation_Home>\install\
```

```
<Interact_Home>\interactDT\tools\upgrade\conf
```

The "jdbc.properties" file must contain the correct JDBC URL, Platform system database userID and encrypted password. If this information is incorrect, then the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool.sh/bat". This Upgrade tool execution is similar to the usual acUpgradeTool execution of Campaign.
4. While executing the upgrade tool you are prompted for database details. Enter the Interact DesignTime database details.
5. The tool will also prompt for "select base version to upgrade". You will be able to see the upgrade version specified for CHOICES\_FOR\_PREVIOUS\_VERSIONS.  
Select the fast upgrade base version to upgrade from.
6. Once the upgrade tool execution completes, check the related logs to ensure that no errors were encountered during the upgrade tool execution.

## Upgrading Interact RT, Interact learning and Interact Production databases

1. Update setenv.sh with required values for Unica Interact upgrade. For details on the environment variables in the setenv.sh file, see the Unica Interact Upgrade guide.
  - a. Navigate to `<Interact_Home>/tools/upgrade`. Set the following variables in the setenv.sh file:

```
set JAVA_HOME= <Installation Path>/jre
```

```
set JDBC_DRIVER_CP= Actual location of the database driver along with database driver
```

```
ex: set JDBC_DRIVER_CP= /opt/HCL/FastUpgrade12/ojdbc8.jar
```

```
set JDBC_DRIVER_CLASS = Database driver
```


```
set JDBC_DRIVER_URL = Database URL
```

The database URL can be the same in DB2 and Oracle if you are using the same DB with different schemas.

In case you require to update the database URL for the SQLServer, update the respective DB before executing the upgrade tool.

Change the log file name and location if required.

- b. Navigate to `<Interact_Home>\tools\upgrade\conf`, edit the `ACIUpgradeTaskList_crhtab.properties` file, and change the value of `CHOICES_FOR_PREVIOUS_VERSIONS=8.6.x` or other base version you are upgrading from.

 **Note:** If `CHOICES_FOR_PREVIOUS_VERSIONS` is already present that you are upgrading from, then do not make change in the value.

- c. Repeat the above change for the `ACIUpgradeTaskList_lrntab.properties`, `ACIUpgradeTaskList_runtab.properties`, `ACIUpgradeTaskList_usrtab.properties` files at the above mentioned path.

For `setenv.sh`, you must update the username to the actual user who runs the tool.

For example: you are required to update this entry - `$whoami != "root"` to  
`$whoami != "username"`

Here is the list of supported choices for previous version selection. Users can select the relevant one.

- 8.6.x
- 9.0.x
- 9.1.0
- 9.1.1
- 9.1.2
- 10.0.0
- 10.1.0
- 11.0.1
- 11.1.0
- 12.0.0
- 12.1.0

2. Pre-requisite to complete before running the Interact upgrade tool: Update the `jdbc.properties` file under: `<Installation_Home>\install\ <Interact_Home>\tools\upgrade\conf`

The "jdbc.properties" file must contain the correct JDBC URL, Platform system database userID and encrypted password. If this information is incorrect, the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool\_crhtab .sh/bat" . This Upgrade tool execution is similar to the usual aciUpgradeTool.
  - a. While executing the upgrade tool you are prompted for database details mention the details of the Interact DesignTime Database. The tool will also prompt for "select base version to upgrade". You will see the upgrade version specified with CHOICES\_FOR\_PREVIOUS\_VERSIONS= Select the fast upgrade base version you are upgrading from.
  - b. Once the upgradetool execution completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.
4. Execute Interact "aciUpgradeTool\_runtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
  - a. While executing the upgrade tool you are prompted for database details. Enter the Interact RunTime Database details. The tool will also prompt for "select base version to upgrade", you can see the upgrade version specified in CHOICES\_FOR\_PREVIOUS\_VERSIONS. Select the fast upgrade base version you are upgrading from.
  - b. Once the upgradetool execute completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.
5. Execute Interact "aciUpgradeTool\_lrntab .sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
  - a. While executing the upgrade tool you are prompted for database details. Enter the Interact Learning Database details. The tool will also prompt for "select base version to upgrade". You can see the upgrade version specified with CHOICES\_FOR\_PREVIOUS\_VERSIONS. Select the fast upgrade base version to upgrade from.
  - b. Once the upgradetool execution completes, check the related logs and ensure that errors were not encountered during the upgrade tool execution.

6. Execute Interact "aciUpgradeTool\_usrtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
  - a. During the execution of the upgrade tool, you are prompted for database details. Enter the Interact Production/prod Database details. The tool will also prompt for "select base version to upgrade". You can see the upgrade version specified with CHOICES\_FOR\_PREVIOUS\_VERSIONS. Select the fast upgrade base version to upgrade from.
  - b. Once the upgradetool execution completes, check the related logs and ensure no errors were encountered during the upgrade tool execution.

## Execute ILPB Migration Utility

See the Unica Interact Upgrade Guide for more details.

## Execute Strategy migration utility

See the Unica Interact Upgrade Guide for more details.

## Updating the JDBC file in InteractRT WAR

In case you do not want to reuse the Platform schema used in the 12.0 clean installation and rather want to use another user schema, follow the additional steps underneath:

1. Take a back up of the interactRT.war file from the 12.0 environment (Interact/interactRT.war).
2. Unwar the interactRT.war file.
3. Copy the jdbc.properties file from Platform/tools/bin/ directory and paste it under interactRT.war/WEB-INF/classes.
4. Re-war the interactRT.



## Post Upgrade


1. Register Interact DT Rest API Filter V2. Navigate to the `PLATFORM_HOME/tools/bin` directory. Execute the following commands:

```
configTool.bat -vp -p "Affinium|suite|security|apiSecurity|interact" -f
<Interact_Home>\interactDT\conf\ Interact_API_V2_Filter.xml
```

2. Interact version registration:

- a. Execute the following command on the source environment and navigate to the `PLATFORM_HOME/tools/bin` directory. Execute the command: `./configTool.sh -x -p "Affinium|Interact|about" -f Interact_about.xml`

- b. Update the product name from 'IBM Interact' to 'Unica Interact' in the 'Interact\_about.xml' file.

 **Note:** Do not update the product name if you are upgrading from 11.0 -> 11.x in the Interact\_about.xml file.

- c. Copy the exported output on the 12.1 - Destination system under the `PLATFORM_HOME/tools/bin` directory.

- d. Modify the version information in "Interact\_about.xml" file referring to the Interact version in version.txt.

For example: `<value>12.1.0.<Build number as per version.txt></value></property>`. The following are the lines from 8.6.x.

```
<property id="6261" name="support" type="string_property"
width="40">
<value>https://customercentral.unica.com%3C/value%3E</value
```

- e. Update the following property.

```
<property id="6260" name="java" type="string_property" width="40">
<value>IBM Corporation 2.4</value>
```

```
</property>
```

to

```
<property id="6260" name="java" type="string_property" width="40">
  <value>HCL Technologies Ltd.</value>
</property>
```

f. Execute the following command on the destination 12.1 environment: ./

```
configTool.sh -v -o -i -p "Affinium|Interact" -f Interact_about.xml
```

g. For the Interact sub component version, execute the following commands on the destination 12.1 environment.

Navigate to the `PLATFORM_HOME/tools/bin` directory.

Execute command: `./configTool.sh -i -p "Affinium|Campaign|about|components" -f <INTERACT_HOME>/interactDT/conf/interact_subcomponent_version.xml -o`

3. This step is not required if you are upgrading from 11.x version. You must update the old Interact navigation with a new one.

4. Execute the following commands on the destination 12.1 environment:

Remove old menu: `configTool.bat -d -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Interactive Channels" -o`

Add the new menu:

```
configTool.sh/bat -i -p "Affinium|suite|uiNavigation|mainMenu" -f "
full_path_to_Interact_installation_directory/conf/
interact_navigation.xml"
```

5. Register Unica Interact settings as configuration menu under

`"Affinium|suite|uiNavigation|settingsmenu"` using `full_path_to_Interact_installation_directory/interactDT/conf/interact_setup_navigation.xml`.

6. Platform – DBResourceBundle: The following steps imports resource bundles in Unica Platform. Execute the script underneath as specified:
  - a. Navigate to `<platform_home>/tools/bin`.
  - b. Run this command. `DBResourceBundle.sh /bat -P interact-F <Interact_home>/resourcebundles`
7. If you have added any custom entries in the 'interact\_log4j.xml' file on source 8.6 setup, then you must copy those custom entries into the target setup in the newly added 'interact\_log4j2.xml' file.
8. Deploy Interact RT WAR file.
9. Update the configuration instanceURLs accordingly for your ServerGroup defined at `Affinium|Campaign|partitions|partition1|Interact|serverGroups`.

## The second Interact runtime

1. Repeat the following steps for each Interact runtime if you have used a different server group and Platform.
2. Install new Platform 12.1 with Interact RT.
3. Perform the Platform upgrade and make the setup ready. Refer the Platform Upgrade Guide.
4. Copy and restore the InteractRT database from the source to the target.
5. Upgrade the database from source database to 12.1 by running the aciupgrade utility for RT.
6. Create data sources on the target application server using the same JNDI names as the source setup.
7. Deploy InteractRT.war.

## Important

CFS updates: If the customer is using SOAP, then generate the proxy code based on the new WSDL and rebuild the CFS code using the new proxy.

## Notes

- After Upgrade, it is observed that a Configuration Node sessionManagement is displayed under: `Affinium|interact|`. Removal of this configuration can be done using the Platform `configTool.sh/configTool.bat` tool.
- After upgrade, it is observed that configuration Node treatmentStore is displayed under `Affinium|Interact|services|contactHist|`. Removal of this configuration can be done using the Platform `configTool.sh/configTool.bat` tool.
- In case, after deployment during access you encounter the `DB2 SQL Error: SQLCODE=-668, SQLSTATE=57016, SQLERRMC=7` error, then contact your DBA and run the REORG query on the necessary database tables.
- Removal steps are not applicable if you are upgrading from 11.x to 12.0.

## Configure Unica Insights reports with Interact

Complete the following steps.

1. Import Interact Reports schemas in Platform configuration.

Navigate to "`<INTERACT_HOME>/reports/tools`".

Run the `import_all.sh/bat` script.

2. For Reports pack configurations, see the Unica Insights Reports Installation and Configuration guide.

## Procedure: Fast upgrade Unica Plan

### Plan pre-upgrade

Note:

1. Existing customers who want to upgrade to JBoss + 12.1, must perform the following steps:
  - Clear the recent items for all the users. Note: Administrator: Please communicate to all the users to clear their respective recent items prior to the migration to JBoss.
  - Clear the directory `<PLAN_HOME>/recentdata`.
  - Migrate to JBoss + 12.1.
2. No change is required to be done by new customers who are installing JBoss + 12.1. This is because recent items will not be present in their case.

For a Plan pre-upgrade, perform the following steps:


1. Import the Plan system tables backup from the old version to the system tables schema used in a clean 12.1 environment.
2. Take a file system backup of the source and the destination of the following folders:
  - `<PLAN_HOME>/accountattachments` directory.
  - `<PLAN_HOME>/approvalitems` directory.
  - `<PLAN_HOME>/assets` directory.
  - `<PLAN_HOME>/componentattachments` directory.
  - `<PLAN_HOME>/images` directory.
  - `<PLAN_HOME>/invoiceattachments` directory.
  - `<PLAN_HOME>/planattachments` directory.
  - `<PLAN_HOME>/programattachments` directory.
  - `<PLAN_HOME>/projectattachments` directory.
  - `<PLAN_HOME>/templates` directory.
3. Copy or merge all files mentioned in step 2 in 12.1 from the source folders to the destination Plan respective folders.

4. In the source version, if you have customized the `plan_log4j.xml` file and `plan_ehcache.xml` file, copy the `plan_log4j.xml` file and `plan_ehcache.xml` file to `Plan_HOME/conf` folder of the destination environment.

Adhere to the following guidelines:

- For the `plan_log4j.xml` file, if the source version is earlier than 11.1.0, ensure that the `plan_log4j.xml` file follows `log4j2` conventions. For more information, see the *Unica Plan Installation Guide*.
- For the `plan_ehcache.xml` file, ensure that you add the attribute-value pair `name="PlanEhCacheManager"`, as shown in the following example, if it does not exist:

```
<ehcache updateCheck="false" name="PlanEhCacheManager">
```

 **Note:** You can ignore *Step 4* if you have not made any changes to the `plan_log4j.xml` file and `plan_ehcache.xml` file in the source version, and if you want to retain the target file without any modifications.

5. Rename `ext` folder to `ext_data` on the destination server at the `<PLAN_HOME>/messages/com/hcl/umo/` path.

6. For Unica Plan version prior to 12.0, copy the `ext` folder from the source location `<PLAN_HOME>/messages/com/ibm/umo/` and paste it to the destination location `<PLAN_HOME>/messages/com/hcl/umo/`. For Unica Plan version 12.0 and later, copy the `ext` folder from the source location `<PLAN_HOME>/messages/com/hcl/umo/` and paste it to the destination location `<PLAN_HOME>/messages/com/hcl/umo/`.

7. If there are marketing objects in the source setup, copy the following files from the source location `<PLAN_HOME>/conf/en_US` to the target location.

```
mo_creatives_state.xml globalstates.xml sysmenu.xml
sysmodules.xml
```

8. In `<PLAN_HOME>/conf/xx_XX/sysmenu.xml` (where `xx_XX` is the locale) change the value of `<display>` to `Plan` (see the following xml section).

```
<sysmenu>
  <menugroups>
    <default-startup-item>projectmanagement</default-startup-item>
    <menugroup id='projectmanagement'>
      <display>Plan</display>
```

9. In `<PLAN_HOME>/conf/resourcebundles/com/unica/manager/configuration/plan*.properties` files, if the version of existing Unica Plan installation is before 12.0, update the value of `MARKETING_OPERATIONS_SETTINGS` to Plan settings.
10. In `<PLAN_HOME>/conf/en_US/sysmodules.xml` (where `en_US` is the locale), change the value of `<display>` to Plan (see the following xml section).

Run the following commands at:

```
<sysmodules>
  <section>
    <module id='Analytics'>
      <display>Plan analytics</display>
```

11. Run the following command to register plan configuration:

```
./configTool.sh -vp -p "Affinium" -f <PLAN_HOME>/conf/
plan_registration.xml
```

12. Ensure that the following JVM parameters are present. If not add them:

- -
  - Dlog4j2.contextSelector=org.apache.logging.log4j.core.async.AsyncLoggerContextSele
- -Dlog4j2.configurationFile=file:///<PLAN\_HOME>\conf\plan\_log4j.xml
- -Dlog4j.configurationFile=file:///<PLAN\_HOME>\conf\plan\_log4j.xml
- -Dlog4j.configuration=file:///<PLAN\_HOME>\conf\plan\_log4j\_1x.xml

#### Note:

- In the `Dlog4j2.configurationFile=file:///<PLAN_HOME>\conf\plan_log4j.xml` setting, if you have customized the `plan_log4j.xml` and made some changes

to suit your organization, then ensure that you make those settings in the `plan_log4j.xml` specified here as per the `Dlog4j2.configurationFile` that we have deployed to you now.

- Ensure that the `xml` file pointed by `log4j2.configurationFile` and `log4j.configurationFile` is the same and follows the `log4j2` syntax. The file should contain the following two lines at the top:

```
<?xml version="1.0" encoding="UTF-8"?>
<Configuration packages="com.unica.afc.logger"
  monitorInterval="60">
```

- In Windows, the file path contains a back slash, whereas, in UNIX, it must contain a forward slash.
- Ensure that you restart the Plan application server and synchronize the menus.

## Upgrading Unica Plan

### Updating JDBC files

In case you do not want to reuse the Plan schema used in the 12.1 clean installation and rather want to use another user schema, follow the additional steps underneath:

1. Take a back up of the `jdbc.properties` file from the 12.1 environment (`Plan/tools/bin/umo_jdbc.properties`). Update the username of the 12.1 Platform system database / schema name in the `umo_jdbc.properties` file.

Example of `umo_jdbc.properties`:

Name: `umo_data_source.url`

Description: URL reference for the Unica Plan system table database.

Example values for supported databases are:

SQL Server: `jdbc:sqlserver://sqlserverHost:1433;databaseName=databaseName`

IBM DB2: `jdbc:db2://db2Host:50000/databaseName`

Oracle: `jdbc:oracle:thin:@oracleHost:1521:databaseName`



```
umo_data_source.url=jdbc:oracle:thin:@<databaseHostName>:1521:<sid>
```

Name: `umo_data_source.login`

Description: Name of login for Unica Plan database-login account must have database administrative rights.


Name of login for Unica Plan database. login account must have database administrative rights.

```
umo_data_source.login=xmsp
```

Name: `umo_data_source.password`

Description: Password for Unica Plan database for login id provided in `umo_data_source.login` property

```
umo_data_source.password=ENC(+1Kd731xEuzqdDfQjQ9wnw==)
```

 **Note:** If you have used the same user in the Platform and Plan, you can take the encrypted password from the `Platform/tools/bin/jdbc.properties` file.

2. Under `<PLAN_HOME>/tools/bin`, update the `setenv.bat` file with the correct DB driver path for the parameter `DBDRIVER_CLASSPATH`.

## Upgrade to 12.1 config

Note: This procedure is not applicable to Fast Upgrade from version 12.0 to version 12.1.

1. Add `jBoss-logging-3.3.2.Final.jar` and `classmate-1.3.4.jar` in `CLASSPATH` in `setenv`. These files are located in `<Platform_HOME>/tools/lib`.

For example: You can add like following in the classpath

```
${TOOLS_LIB}/../../../../Platform/tools/lib/jboss-logging-3.3.2.Final.jar:${TOOLS_LIB}/../../../../Platform/tools/lib/classmate-1.3.4.jar
```

2. Run the following commands at `Platform_Home/tools/bin`:

```
./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>/conf/
plan_approvals_settings_10.0.0.2.xml
```

```
./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>/conf/
plan_workflowservice_settings_10.0.0.2.xml
```

3. Run `config_migration.sh` in `<PLAN_HOME>/tools/bin`. Prerequisite: Set or update `<UMO_HOME>` in the `config_migration.sh` file.

```
./config_migration.sh -p -b 8.6.0.0 (Replace 8.6 with your existing source version.)
```


4. Run the following command to enable encodeCSV feature:

```
configTool -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>\conf
\Plan_encodeProperty_11.1.xml
```

 **Note:** Ensure that the `jdbc.properties` file within the `<PLAN_HOME>/install` location points to the appropriate Unica Platform database.

## Upgrading Plan database

1. Import the database with the source system tables of the VM containing the fresh installation of 12.1 Plan.
  - a. Run the `umouilistupgrade` utility from `<PLAN_HOME>/tools/bin` to merge the `UMOConfigurationMessages_<locale>.properties` and the `UMOMktObjectConfigurationMessages_<locale>.properties` of 8.6 and 12.1. This utility does not have any parameters: `umouilistupgrade.bat`.
  - b. Run the `umodbsetup` utility to upgrade the database to 12.1: `umodbsetup.bat -t upgrade -m -b 8.6 -L en_US`. Type the above command in the command prompt. Copying may give an error.
  - c. Execute the command: `umodbsetup.bat -t upgrade -b 8.6`. If this does not work, you can execute the `umo_upgrade_[8.6.0.0]_[12.1.0.0].sql` file on the Plan database. This file is located at `<PLAN_HOME>\tools\bin`.

 **Note:** Replace 8.6 with your existing source version

2. If the version of the target system is 12.0.0 or later, execute the following query on Platform database to update the name of the Marketing Operations node to Plan, in Platform configurations:

```
UPDATE usm_configuration SET display_name='Plan' where
internal_name='Plan' and display_name_key='Marketing Operations'
```

## Unica Plan post-upgrade

### Unica Plan Configuration changes

Deploy Unica Plan 12.1.0 war and run the Unica Plan Java Upgrade using the following procedure:

 **Note:**

About `log4j` upgrade

Prior to 11.1, `log4j1x` API was used by the Plan source.

#### For 11.1 and later versions

- The syntax of `<PLAN_HOME>/conf/plan_log4j.xml` has been changed to `log4j2` format.

The configuration file contains the following lines at the top:

```
<?xml version="1.0" encoding="UTF-8"?>
<Configuration packages="com.unica.afc.logger" monitorInterval="60">
```

Prior to upgrade to 12.1, if you had upgraded Unica Plan version to 11.1, a file `plan_log4j.11.1.0.0.xml` is available in the `<PLAN_HOME>/conf/` location, which contains the earlier mentioned syntax.

In this case, the syntax of `plan_log4j.xml` file in the `<PLAN_HOME>/conf/` location would not be as per `log4j2` format

In such a case the file `plan_log4j.11.1.0.0.xml` should be used in the following properties:

- `Dlog4j2.configurationFile`
- `Dlog4j.configurationFile`
- `log4j2x` API is used by Plan source.
- `log4j1x` API is still used by `unica_common.jar` inside Plan JVM, because the Platform source (which results in `unica_common`) has not been changed to use `log4j2x`. For this reason, we provide the `plan_log4j_1x.xml`, which is as per the `log4j1x` syntax. This file is not used by the source code in Unica Plan.

1. Log in as an admin user.
2. In (Affinium|Plan|umoConfiguration) update the location for the nodes listed underneath:
  - templates
  - attachmentFolders
  - integrationServices
3. Update `notifyPlanBaseURL` in Affinium|Plan|umoConfiguration|notifications.
4. Update `serverURL` in Affinium|Plan|navigation.
5. If the new application URL is different than the old one, then you must connect to Plan database and access `UAP_WS_ALERTS` table. Records in this table may contain the pre upgrade application URL. You need to update this table and replace the old application URL by new one.
6. Restart the application server.
7. Go to **Settings -> Plan -> Plan Upgrade**.
8. Select all the checkboxes.

9. Click the "Upgrade" button.

10. Restart the Unica Plan application server and synchronize the menus.

## Setting the Plan – Help About > Version

Change the plan version in the Unica Platform registration:

1. Export the version configuration using the following command on clean 12.1 environment.

```
configTool.sh -x -p "Affinium|Plan|about" -f <PLATFORM_HOME>/conf/plan_about.xml
```

2. Edit the plan\_about.xml file generated by the above command. Change the version to 12.1.0.0.GA\_BUILD".

```
<property id="xxxxxxx" name="releaseNumber" type="string_property"
width="40">
<value>12.1.0.0.GA_BUILD</value>
</property>
```

Change display name as below:

```
<property id="3214" name="displayName" type="string_property"
width="40">
<value>Unica Plan</value>
</property>
```

3. Import this edited xml file using the following command:

```
configTool.sh -v -i -o -p "Affinium|Plan" -f <PLATFORM_HOME>/conf/plan_about.xml
```

## Plan Post Upgrade Functional check

Perform UAT on the plan application. Ensure that all the Plans, Programs, Projects, Tasks, Approvals are opening and that the data is successfully imported. Ensure if all the configurations nodes are available.

## Configure Unica Insights reports with Plan

For Reports pack configurations, see the *Unica Insights Reports Installation and Configuration* guide.

# Procedure: Fast upgrade Unica Collaborate

Complete the prerequisites to upgrade from Unica Collaborate 8.6.x or higher version to Unica Collaborate version 12.1.

1. Ensure that Unica Platform and Unica Campaign are upgraded successfully on the target setup. Install Collaborate version 12.1 on the setup.
2. Take a backup for Collaborate source system databases.

## Upgrading Collaborate database


1. Import the source system database on the target system database for Collaborate version 12.1.
2. Run the `udmdbsetup` utility on target system from `COLLABORATE_HOME/tools/bin`.

Example: If we are upgrading from 8.6.0.0 version, run the following utility.

```
./udmdbsetup.sh -t upgrade -b 8.6.0.0 -m
```

The following `.sql` file is generated under `COLLABORATE_HOME/tools`.

```
udm_upgrade_[8.6.0.0.0]_[10.0.0.2.0].sql
```


 **Note:** Ignore the last version 10.0.0.2.0 mentioned in the file name and execute the same `.sql` file to upgrade the database to Collaborate V12.1.

Execute the generated `.sql` file on Collaborate system database.

3. Create data sources on the target application server and point to the upgraded database schema. You can use the same JNDI names as those in the source system to save effort in doing manual changes.

## Updating files from source to target environment

1. Take a backup of the source and the destination system files under the following directories.
  - `<COLLABORATE_HOME>/projectattachments`
  - `<COLLABORATE_HOME>/templates`
  - `<COLLABORATE_HOME>/taskattachments`
  - `<COLLABORATE_HOME>/attachments`
2. Copy or merge all files mentioned in the previous step from the source folders to the respective destination Collaborate directories.
3. In the source version, if you have customized the following files, copy these files to `COLLABORATE_HOME/conf` directory in the destination environment.
  - `listmanager_tables.xml`
  - `collaborate_log4j.xml`
  - `listmanager_list.xml`
  - `listmanager_searchScreens.xml`

 **Note:** You can ignore this step if you have not made any changes to the mentioned files.

## Collaborate Configuration changes

1. Execute the following query on Platform database to update the name of the Distributed Marketing node to Collaborate in Platform configurations.

```
UPDATE usm_configuration SET display_name='Collaborate' where
internal_name='Collaborate' and display_name_key='Distributed Marketing';
```

## 2. Execute the following commands.

- `configTool.bat -vp -p "Affinium|Collaborate" -f "Collaborate_Home/conf/updates/collaborate_conf_upgrade_maxLimit.xml"`
- `configTool.bat -vp -p "Affinium|Collaborate" -f "Collaborate_Home/conf/updates/collaborate_conf_upgrade_insights.xml"`

## 3. Create a xml file name. For example: validateFileUpload.xml with following contents.

```
<!-- configTool.bat -vp -p "Affinium|Collaborate|UDM Configuration
Settings" -f collaborate_conf_upgrade_insights.xml -->
<category name="Attachment">
    <property name="validateFileUpload" type="radio">
        <value predefined="true" selected="false">true</value>
        <value predefined="true" selected="true">false</value>
    </property>
</category>
```

## 4. Execute the following command.

```
configTool.bat -vp -p "Affinium|Collaborate" -f
"<path_to_validateFileUpload.xml>"
```

## 5. Perform the following substep to import resource bundles in Unica Platform. Execute the following scripts.

- Navigate to `<platform_home>/tools/bin` and execute

```
DBResourceBundle.sh -P Collaborate -F Collaborate_Home/conf/
resourcebundles
```

## 6. Update `serverURL` in `Affinium|Collaborate|navigation`.

## 7. Update `flowchartServiceCampaignServicesURL` in `Affinium|Collaborate|UDM Configuration Settings|Flowchart`.



8. Update `flowchartServiceNotificationServiceURL` in `Affinium|Collaborate|UDM Configuration Settings|Flowchart`.
9. Update `notifyCollaborateBaseURL` in `Affinium|Collaborate|UDM Configuration Settings|Notifications`.

## Collaborate version registration

1. On target environment navigate to the `PLATFORM_HOME/tools/bin` and execute the following command.

```
configTool.sh -x -p "Affinium|Collaborate|about" -f Collaborate_about.xml
```

2. Make the following changes to the `Collaborate_about.xml` file and save it as `collab_about_new.xml` file.
  - a. Replace "display name" value "IBM Unica Distributed Marketing" with "Unica Collaborate"
  - b. Replace "releaseNumber" value "<Old version>" with "12.1.0.0.<Build number as per version.txt>".
  - c. Replace "java" value "IBM Corporation 2.4" with "Oracle Corporation 25.162-b12".

3. Execute the following command on the target version 12.1 environment.

```
configTool.sh -v -i -o -p "Affinium|Collaborate" -f Collaborate_about.xml
```

4. Restart the Unica Collaborate application server.

On completion of upgrade to Unica Collaborate 12.1, the users can access the Collaborate application including Insights reports. For more details on Insights reports configuration, see the Unica Insights Installation and Configuration Guide.

## Procedure: Fast upgrade Unica Centralized Offer Management

To perform the fast upgrade of Unica Centralized Offer Management from version 12.0.0.0 and 12.0.1.0 to 12.1.0.0, perform the following steps.

Ensure that you complete the fast upgrade steps for Platform and Campaign before the Centralized Offer Management fast upgrade.

If you are planning to perform a fast upgrade and add new products like Unica Journey, Unica Centralized Offer Management, Unica Content Integration framework, Unica Insights, and Unica Deliver, to your existing Unica installation, you should first perform the fast upgrade of existing products. After upgrading the base version to 12.1, perform a clean installation of the new products.

1. If you are using a custom offer code generator (other than `uacoffercodegen` that is bundled with the Centralized Offer Management product), copy these custom code generators, along with all the related `DLLs` / `SOS` / `EXEs`, etc, to the location `<CentralizedOffer_Installation_path>/bin..`

If you have configured a different location for the code generators at `Affinium|Offer|partitions|partition<n>|offerCodeGenerator`, place the code generators in the location configured at `Affinium|Offer|partitions|partition<n>|offerCodeGenerator`.

2. If you have made the changes in the logging configuration, merge those changes over the new installation. Typically, it is located at - `<CentralizedOffer_Installation_path>/conf/logging`.
3. If required, copy your previously generated log files to the new file system. Typically, it is located at - `<CentralizedOffer_Installation_path>/logs`.
4. Navigate to `<Platform_Installation_path>/tools/bin` and execute below commands.
  - `DBResourceBundle.bat(/sh) -P Offer -F <CentralizedOffer_Installation_path>/resourcebundles/com/unica/manager/configuration`

- `configTool.bat(/sh) -d -p "Affinium|Offer|logging" -o`
- `configTool.bat(/sh) -up -p "upgrade COM"`

## Procedure: Fast upgrade Unica Content Integration


To perform the fast upgrade of Unica Content Integration from version 12.0.0.0 and 12.0.1.0, perform the following steps.

1. Complete the fast upgrade procedure for Unica Platform and ensure that database is migrated to the new installation environment. This includes required admin configurations and user roles for Unica Content Integration.
2. Customize the logging configurations as per the requirements or as per the existing setup in the following listed files.


- `{PLATFORM_HOME}/AssetPicker/conf/logging/log4j.xml`
- `{PLATFORM_HOME}/AssetPicker/conf/logging/log4j2.xml`

If required, move all the logs from previous installation to the new installation location from below mentioned directory `{PLATFORM_HOME}/AssetPicker/logs`.

3. If any custom plugins were deployed for Content Integration in existing installation, follow the instructions given below to deploy those on new installation.
  - a. Copy all custom plugin jars under `{PLATFORM_HOME}/AssetPicker/plugins/custom` directory.
  - b. Edit the `{PLATFORM_HOME}/AssetPicker/conf/plugin-services.yml` file and add service declarations for all the custom plugins copied under aforementioned directory. Service declarations for existing custom plugins can be found inside `META-INF/*-content-services.yml` files within respective plugin jars.
 

 **Note:** Ensure that you only append the individual service declarations without top level “services” element.
  - c. If any customization was made to the out of the box supported CMS plugin, ensure that you delete the corresponding default jar from `{PLATFORM_HOME}/`

`AssetPicker/plugins/out-of-the-box` directory to avoid potential runtime conflicts.

 **Note:** Any customization in `{PLATFORM_HOME}/AssetPicker/conf/i18n/*.properties` files will no longer be supported v12.1 onwards. Hence, this directory will not be present this release onwards.

#### 4. Execute the following commands

- On Windows:
  - `{PLATFORM_HOME}/tools/bin/DBResourceBundle.bat -P ContentIntegration -F {PLATFORM_HOME}/AssetPicker/resourcebundles/com/unica/manager/configuration`
- On Unix:
  - `{PLATFORM_HOME}/tools/bin/DBResourceBundle.sh -P ContentIntegration -F {PLATFORM_HOME}/AssetPicker/resourcebundles/com/unica/manager/configuration`

## Procedure: Fast upgrade Cognos Reports

### Unica Campaign Report Fast Upgrade

The following steps provide you a high level overview of Cognos Reports Upgrade process:

Users are required to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with HCL Unica v12.1.

Fast upgrade process does not take care of upgrading any customization done in the HCL Unica system tables, users will need to take care of upgrading / validating the customization after upgrade.

#### **Upgrade Steps for Reports when no customization done in Unica Campaign Reports:**

Users are required to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide. High level steps involved in the report Installation are as follows.

**Upgrade Steps for Reports when customization is done in Unica Campaign Reports:**

Cognos model can be upgraded by sequential execution of model upgrade scripts from "`<ReportsPackCampaign>/cognos11/CampaignModel`" directory. Run the following scripts:

Campaign Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade86to90.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade90to91.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade91to911.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade911to9112.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade912to100.xml</code>
9.0.x	<code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade90to91.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade91to911.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade911to9112.xml</code> <code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade912to100.xml</code>
9.1.x	<code>&lt;ReportsPackCampaign&gt;\cognos11\CampaignModel  \upgrade91to911.xml</code>

	<ReportsPackCampaign>\cognos11\CampaignModel \upgrade911to9112.xml <ReportsPackCampaign>\cognos11\CampaignModel \upgrade912to100.xml
9.1.1.x	<ReportsPackCampaign>\cognos11\CampaignModel \upgrade911to9112.xml <ReportsPackCampaign>\cognos11\CampaignModel \upgrade912to100.xml
9.1.2.x	<ReportsPackCampaign>\cognos11\CampaignModel \upgrade912to100.xml
10.0.x	No Change in Campaign Reports Model
10.1.x	No Change in Campaign Reports Model
11.0.0	No Change in Campaign Reports Model
12.0.0	No Change in Campaign Reports Model
12.1.0	No Change in Campaign Reports Model

## Unica Deliver Reports Fast Upgrade

You are required to configure Cognos reports for Deliver introduced with Unica V12.1. To configure Deliver reports, see the *Table 3 "Roadmap for installing the Unica integration components and report models on the Cognos system"* in *Cognos Reports Installation and Configuration Guide* and follow the required steps.

## Unica Plan Reports Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with Unica v12.1.

**Upgrade Steps for Reports when no customization done in Unica Plan Reports:**

User will need to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup
2. Import Unica Reports for plan.zip file from v12.1 (<ReportsPackPlan>\cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1 using IBM Cognos framework manager.
4. Use the newly published model while configuring reports with the server.

#### Upgrade Steps for Reports when customization is done in Plan Reports:

1. Backup customize reports from old IBM Cognos BI server
2. Import Unica Reports for plan.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "<ReportsPackPlan >/cognos11/PlanModel" directory. Run the following scripts:

Unica Plan Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<ReportsPackPlan>\cognos11\PlanModel \upgrade86to90.xml  <ReportsPackPlan>\cognos11\PlanModel \upgrade90to91.xml  <ReportsPackPlan>\cognos11\PlanModel \upgrade91to911.xml

	<ReportsPackPlan>\cognos11\PlanModel \upgrade911to9112.xml
9.0.x	<ReportsPackPlan>\cognos11\PlanModel \upgrade90to91.xml  <ReportsPackPlan>\cognos11\PlanModel \upgrade91to911.xml  <ReportsPackPlan>\cognos11\PlanModel \upgrade911to9112.xml
9.1.x	<ReportsPackPlan>\cognos11\PlanModel \upgrade91to911.xml  <ReportsPackPlan>\cognos11\PlanModel \upgrade911to9112.xml
9.1.1.x	<ReportsPackPlan>\cognos11\PlanModel \upgrade911to9112.xml
9.1.2.x	No Change in Unica Plan Reports Model
10.0.x	No Change in Unica Plan Reports Model
10.1.x	No Change in Unica Plan Reports Model
11.0.0	No Change in Unica Plan Reports Model
12.0.0	No Change in Unica Plan Reports Model
12.1.0	No Change in Unioa Plan Reports Model

## Unica Plan and Campaign Reports Fast Upgrade

User will need to follow the regular reports upgrade steps referring to HCL Unica Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup



2. Import Unica Reports for Unica Plan and Campaign.zip file from v12.1 (`<ReportsPackCampaignPlan>\cognos11`) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1 using IBM Cognos framework manager.
4. Use the newly published model while configuring reports with the server.

### Upgrade Steps for Reports when customization is done in Unica Plan Reports:

1. Backup customize reports from old IBM Cognos BI server.
2. Import Unica Reports for plan and Campaign.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "`< ReportsPackCampaignPlan>/cognos11/PlanModel`" directory. Run the following scripts:

Unica Plan Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<code>&lt;ReportsPackCampaignPlan&gt;\cognos11\PlanCampaign \upgrade86to90.xml</code> <code>&lt;ReportsPackCampaignPlan&gt;\cognos11\PlanCampaign \upgrade90to91.xml</code> <code>&lt;ReportsPackCampaignPlan&gt;\cognos11\PlanCampaign \upgrade91to911.xml</code> <code>&lt;ReportsPackCampaignPlan&gt;\cognos11\PlanCampaign \upgrade911to9112.xml</code>
9.0.x	<code>&lt;ReportsPackCampaignPlan&gt;\cognos11\PlanCampaign \upgrade90to91.xml</code>

	<ReportsPackCampaignPlan>\cognos11\PlanCampaign \upgrade91to911.xml  <ReportsPackCampaignPlan>\cognos11\PlanCampaign \upgrade911to9112.xml
9.1.x	<ReportsPackCampaignPlan>\cognos11\PlanCampaign \upgrade91to911.xml  <ReportsPackCampaignPlan>\cognos11\PlanCampaign \upgrade911to9112.xml
9.1.1.x	<ReportsPackCampaignPlan>\cognos11\PlanCampaign \upgrade911to9112.xml
9.1.2.x	No Change in Plan Campaign Reports Model
10.0.x	No Change in Plan Campaign Reports Model
10.1.x	No Change in Plan Campaign Reports Model
11.0.0	No Change in Plan Campaign Reports Model
12.0.0	No Change in Plan Campaign Reports Model
12.1.0	No Change in Plan Campaign Reports Model

## Unica Interact Reports Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with Unica v12.1.

### **Upgrade Steps for Reports when no customization done in Interact Reports:**

User will need to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup

2. Import Unica Reports for Interact.zip file from v12.1 (<ReportsPackInteract> \cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1 using IBM Cognos framework manager,
4. Use the newly published model while configuring reports with the server.

### Upgrade Steps for Reports when customization is done in Interact Reports:

1. Backup customize reports from old IBM Cognos BI server
2. Import Unica Reports for Interact.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "<ReportsPackInteract >/cognos11/InteractModel" directory. Run the following scripts:

Unica Interact Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<ReportsPackInteract>\cognos11\InteractModel \upgrade86to90.xml <ReportsPackInteract>\cognos11\InteractModel \upgrade90to91.xml <ReportsPackInteract>\cognos11\InteractModel \upgrade91to911.xml <ReportsPackInteract>\cognos11\InteractModel \upgrade911to9112.xml <ReportsPackInteract>\cognos11\InteractModel \upgrade912to9121.xml

9.0.x	<p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade90to91.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade91to911.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade911to9112.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade912to9121.xml</p>
9.1.x	<p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade91to911.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade911to9112.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade912to9121.xml</p>
9.1.1.x	<p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade911to9112.xml</p> <p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade912to9121.xml</p>
9.1.2.x	<p>&lt;ReportsPackInteract&gt;\cognos11\InteractModel \upgrade912to9121.xml</p>
10.0.x	No Change in Interact Reports Model
10.1.x	No Change in Interact Reports Model
11.1	No Change in Interact Reports Model
12.0	No Change in Interact Reports Model
12.1	No Change in Interact Reports Model

## Procedure: Fast Upgrade Unica Insights Reports

The following procedures allow you to upgrade the Unica Insights reports from versions 12.0.0.0 and 12.0.0.1 to version 12.1.0.0. Perform the following steps to upgrade Campaign, Deliver, Plan, or Interact reports.

1. Perform the following substeps to upgrade from 12.0.x version to 12.1.0 version.
  - a. Undeploy hcl-birt.war.
  - b. Delete hcl-birt.war from the application server directory.
2. Copy UnicaInsights.war from `<PLATFORM_HOME>/Insights/Insights.war` to application server directory.
3. Deploy UnicaInsights.war.
4. Copy the respective product reports folder for which you want to perform upgrade in Unica Insights directory. For details, see the Unica Insights Reports Installation and Configuration guide.

## Unica Campaign and Deliver Reports Fast Upgrade

To perform the fast upgrade of Unica Campaign reports, complete the following steps.

1. Copy the following report design files folders from Campaign installation directory to `<PLATFORM_HOME>/Insights/ Reports` root folder.

File names have `<ora/db2/sqlsvr/mariadb_*.rptdesign` to identify the db type.

RPT design files	Platform target folders
<code>/Campaign/reports/Affinium Campaign/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/campaign/partitions/ partitionN /Affinium Campaign/</code>
<code>/Campaign/reports/Affinium Campaign/Performance Reports/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/campaign/partitions/</code>

RPT design files	Platform target folders
	partitionN /Affinium Campaign//Performance Reports/
/Campaign/reports/Affinium Campaign/Performance Reports/ Campaign Offer Performance Over Time/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/ partitionN /Affinium Campaign/ Performance Reports/Campaign Offer Performance Over Time/
/Campaign/reports/Affinium Campaign/Performance Reports/ Offer Performance Over Time/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/ partitionN /Affinium Campaign//Performance Reports/ Offer Performance Over Time/
/Campaign/reports/Affinium Campaign - Object Specific Reports/campaign/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/ partitionN /Affinium Campaign - Object Specific Reports/ campaign/
/Campaign/reports/Affinium Campaign - Object Specific Reports/offer/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/ partitionN /Affinium Campaign - Object Specific Reports/ offer/
/Campaign/reports/Affinium Campaign/Deliver Reports/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/ partitionN / Affinium Campaign/Deliver Reports/
/Campaign/reports/Unica Dashboards/Campaign/	<PLATFORM_HOME>/Insights/ Reports/UnicaDashboard/

RPT design files	Platform target folders
	Campaign/partitions/ partitionN/
/Campaign/reports/Unica Dashboards/Deliver/	<PLATFORM_HOME>/Insights/ Reports/Unica Dashboard/ Deliver/partitions/partitionN/

2. Register Campaign/reports/schema/Deliver\_performance.xml using Campaign /reports /tools /import\_all.bat/sh.
3. For Campaign, run /Campaign/reports/schema/templates\_sql\_load.sql against Platform database.
4. For Deliver, run the following scripts against Campaign database.
  - /Campaign/reports/tools/uare\_lookup\_create\_Oracle/MSSQL/DB2.sql
  - /Campaign/reports/tools/uare\_lookup\_populate\*.sql (for all locales)
  - /Campaign/reports/Deliver-ddl/<DBType>/acer\_tables\_db2/ora/sqlserver.sql
  - /Campaign/reports/Deliver-ddl/<DBType>/acer\_indexes\_db2/ora/sqlserver.sql
  - /Campaign/reports/Deliver-ddl/<DBType>/acer\_scripts\_db2/ora/sqlserver.sql
5. For Deliver reports, the database details need to be configured using Insights DB utility. The following are the steps.
  - a. After installation of products is completed, open command prompt and navigate to <PLATFORM\_HOME>/Insights/tools/bin
  - b. At this location, the reports utility is present.

Execute the below command

```
insightsDBUtil.bat -ds=DeliverDS -bPath=<CAMPAIGN_HOME>/reports -
DBType=<DB_TYPE> -URL=<JDBC_URL> -user=<user> -pwd=<password>
```

c. Then perform the same steps like Campaign reports to place the reports under `<INSIGHTS_HOME>/Reports`. For more details, see the Insights Reports Installation and Configuration Guide.

6. Navigate to **Configuration > Report SQL Generator**, and create views or materialized views as per the database type. For more information, see the Unica Insights Reports Installation and Configuration guide.

## Unica Interact Reports Fast Upgrade

To perform the fast upgrade of Unica Interact reports, complete the following steps.

Copy the following report design files folders from Interact installation directory to `<PLATFORM_HOME>/Insights/ Reports` root folder.

File names have `<ora/db2/sqlsvr_*.rptdesign` to identify the db type.

RPT design files	Platform target folders
<code>/&lt;INTERACT_HOME&gt;/reports/Unica Interact/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/campaign/partitions/ partitionN/Unica Interact/</code>
<code>/&lt;INTERACT_HOME&gt;/reports/Unica Interact/Interactive Entity Reports</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/campaign/partitions/ partitionN/Unica Interact/ Interactive Entity Reports</code>
<code>/&lt;INTERACT_HOME&gt;/reports/Unica Interact - Object Specific Reports/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/campaign/partitions/ partitionN/Unica Interact - Object Specific Reports/</code>
<code>/&lt;INTERACT_HOME&gt;/reports/Unica Dashboards/interact/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/Unica Dashboard/ Interact/partitions/partitionN</code>




## Unica Plan Reports Fast Upgrade

To perform the fast upgrade of Unica Plan reports, complete the following steps.

1. Copy the following report design files folders from Plan installation directory to `<PLATFORM_HOME>/Insights/ Reports` root folder.  
File names have `<ora/db2/sqlsvr_*.rptdesign` to identify the db type.

2. Navigate to `Affinium|Plan|umoConfiguration|reports` and change the following properties. For example:

reportsAnalysisSectionHome	Plan/Affinium Plan
reportsAnalysisTabHome	Plan/Affinium Plan - Object Specific Report

 **Note:** You must not include a slash (/) in the beginning of the path of these properties.

RPT design files	Platform target folders
<code>/Plan/reports/ Insights_Reports/Affinium Plan/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/Plan/Affinium Plan/</code>
<code>/Plan/reports/ Insights_Reports/Affinium Plan - Object Specific Reports/</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/Plan/Affinium Plan - Object Specific Reports/</code>
<code>/Plan/reports/ Insights_Reports/Affinium Plan - Object Specific Reports/plan</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/Plan /Affinium Plan - Object Specific Reports/plan</code>
<code>/Plan/reports/ Insights_Reports/Affinium Plan</code>	<code>&lt;PLATFORM_HOME&gt;/Insights/ Reports/Plan/Affinium Plan</code>

RPT design files	Platform target folders
- Object Specific Reports/ program	- Object Specific Reports/ program
/Plan/reports/ Insights_Reports/Affinium Plan - Object Specific Reports/ project	<PLATFORM_HOME>/Insights/ Reports/Plan/Affinium Plan - Object Specific Reports/ project
/Plan/reports/ Insights_Reports/Affinium Plan - Object Specific Reports/team	<PLATFORM_HOME>/Insights/ Reports/Plan/Affinium Plan - Object Specific Reports/team
/Plan/reports/ Insights_Reports/Unica Dashboards/plan/	<PLATFORM_HOME>/Insights/ Reports/Unica Dashboard/Plan

## Troubleshooting

- SQL :Error: Caused by: com.microsoft.sqlserver.jdbc.SQLServerException: Cannot insert duplicate key row in object 'dbo.USM\_CONFIGURATION' with unique index 'IX\_USM\_CONFIGURATION'. The duplicate key value is (<NULL>, Affinium).

1.Drop the Index of USM\_CONFIGURATION

```
DROP INDEX [USM_CONFIGURATION].IX_USM_CONFIGURATION;
```

```
DROP INDEX [USM_CONFIGURATION].IX1_USM_CONFIGURATION;
```

```
DROP INDEX [USM_CONFIGURATION].IX2_USM_CONFIGURATION;
```

OR

```
DROP INDEX IX_USM_CONFIGURATION;
```

```
DROP INDEX IX1_USM_CONFIGURATION;
```

```
DROP INDEX IX2_USM_CONFIGURATION;
```

## 2. Create# the Index for#USM\_CONFIGURATION

```
CREATE UNIQUE INDEX IX_USM_CONFIGURATION ON
USM_CONFIGURATION (PARENT_ID asc, INTERNAL_NAME asc);
```

```
CREATE UNIQUE INDEX IX1_USM_CONFIGURATION ON
USM_CONFIGURATION (NS_THREAD asc, NS_LEFT asc);
```

```
CREATE UNIQUE INDEX IX2_USM_CONFIGURATION ON
USM_CONFIGURATION (NS_THREAD asc, NS_RIGHT asc);
```

- DB2 – Constraint violation errors: DB2 data migration from old base environment to 11.1 (clean environment) should be done with help of DBA. Before proceeding with upgrade steps y should ensure that all the database tables, constraints, indexes etc. are migrated successfully. For DB2 system tables import in clean 11.1 will cause issues with AUTO ID increment on certain tables. Due to these errors there will be related to constraint violation error.

This step should be executed only if the "Upgrading the Platform configuration" step fails with errors related to constraint violation error:

```
SELECT MAX(ID)+ 1 FROM USM_CONFIGURATION;
```

```
ALTER TABLE USM_CONFIGURATION ALTER COLUMN ID RESTART WITH NNNN; --here
put the result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_ROLE;
```

```
ALTER TABLE USM_ROLE ALTER COLUMN ID RESTART WITH NNNN; -- here put the
result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_DB_RESOURCE_BUNDLE;
```

```
ALTER TABLE USM_DB_RESOURCE_BUNDLE ALTER COLUMN ID RESTART WITH
NNNN; --here put the result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_AUDIT;
```

```
ALTER TABLE USM_AUDIT ALTER COLUMN ID RESTART WITH NNNN; -- here put the
result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_ALERT;
```

```
ALTER TABLE USM_ALERT ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_ALERT_SUBSCRIPTION;
```

```
ALTER TABLE USM_ALERT_SUBSCRIPTION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_NOTICE;
```

```
ALTER TABLE USM_NOTICE ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASHBOARD;
```

```
ALTER TABLE USM_DASHBOARD ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASHBOARD_PORTLET;
```

```
ALTER TABLE USM_DASHBOARD_PORTLET ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_IFRAME_DET;
```

```
ALTER TABLE USM_DASH_PORT_IFRAME_DET ALTER COLUMN ID RESTART WITH  
NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_PREF_MAP;
```

```
ALTER TABLE USM_DASH_PORT_PREF_MAP ALTER COLUMN ID RESTART WITH  
NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_MANAGE_RIGHTS;
```

```
ALTER TABLE USM_DASH_MANAGE_RIGHTS ALTER COLUMN ID RESTART WITH  
NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_PORT_QUICKLINK_PREF;
```

```
ALTER TABLE USM_PORT_QUICKLINK_PREF ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_PERSONALIZATION;
```

```
ALTER TABLE USM_PERSONALIZATION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_OBJECT_TYPE;
ALTER TABLE USM_OBJECT_TYPE ALTER COLUMN ID RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_OBJECT_ATTR;
ALTER TABLE USM_OBJECT_ATTR ALTER COLUMN ID RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USCH_TASK_NOTIFICATION;
ALTER TABLE USCH_TASK_NOTIFICATION ALTER COLUMN ID RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USCH_RUN_NOTIFICATION;
ALTER TABLE USCH_RUN_NOTIFICATION ALTER COLUMN ID RESTART WITH NNNN;

SELECT MAX(TASKID)+ 1 FROM USCH_TASK;
ALTER TABLE USCH_TASK ALTER COLUMN TASKID RESTART WITH NNNN;

SELECT MAX(RUNID)+ 1 FROM USCH_RUN;
ALTER TABLE USCH_RUN ALTER COLUMN RUNID RESTART WITH NNNN;

SELECT MAX(RUNEXCLUSIONID)+ 1 FROM USCH_RUN_EXCLUSION;
ALTER TABLE USCH_RUN_EXCLUSION ALTER COLUMN RUNEXCLUSIONID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 from USM_ALERT_TYPE;
ALTER TABLE USM_ALERT_TYPE ALTER COLUMN ID RESTART WITH NNNN
```

You must execute the 'commit;' statement after the tables are altered.

- DB2 – In case your DBA observed Unica Platform system tables constraints are not imported in the 11.1 system database, then you can execute following query: It will create missing constraints. For constraints that are already present, it shows errors that can be ignored.

Execute the script file: <PLATFORM\_HOME> /db/  
ManagerSchema\_DB2\_CreateFKConstraints.sql

- If the temp table is ON in the source DB, it can create to Temp table related issues in the target setup.
- The user DB used in Target setup should be the same as the source. If a different User DataSource is used, then the existing flowcharts will not get executed due to table mappings differences.
- Oracle export database schema using "exp" utility does not export tables with no rows. Note: Before executing these scripts, review them with your DBA, this approach is used by engineering, you can take the appropriate approach as suggested by your DBAs. In this case, you can execute the scripts underneath to enable the export of tables with no records. `SELECT 'ALTER TABLE '||table_name||' ALLOCATE EXTENT;' FROM user_tables WHERE segment_created = 'NO';` This script will provide SQL scripts as output that should be executed in the schema that needs to be exported.
- Oracle – Constraint violation errors: Oracle data migration from old base environment to 11.1 (clean environment) must be done with help of a DBA. Before proceeding with upgrade steps please ensure that all the database tables, constraints, indexes and so on are migrated successfully. In Oracle the following error is displayed:

```
ORA-00001: unique constraint (UNICA_PLATFORM.SYS_C0038815) violated
insert into USM_CONFIGURATION_VALUES (VERSION, PREDEFINED,
SELECTED, STRING_VALUE, NUMERIC_VALUE, DATE_VALUE, CONFIGURATION_ID,
CONFIGURATION_ORDER, ENVIRONMENT_ID, USER_ID) values (" , " , " , " , " ,
" , " , " , " , " )
```

The following steps should be executed only if the "Upgrading the Unica Platform configuration" step fails with errors related to constraint violation error:

1. Create a backup of the USM\_CONFIGURATION and USM\_CONFIGURATION\_VALUES tables.
2. Create a 'full export' of the configuration: `./configTool.sh/bat -x -f full_export.xml`
3. Truncate the USM\_CONFIGURATION\_VALUES table: `truncate table usm_configuration_values; commit;`
4. Delete from USM\_CONFIGURATION table: `delete from usm_configuration; commit;`
5. Import the "full\_export.xml" file: `./configTool.sh/bat -i -p "Affinium" -f full_export.xml`

6. Reattempt the failing command.