

IBM Interact  
Version 9 Release 1  
October 25, 2013

*Installation Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 65.

This edition applies to version 9, release 1, modification 0 of IBM Interact and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. Installation overview

An installation of Interact is complete when you install, configure, and deploy Interact. The Interact Installation Guide provides detailed information about installing, configuring, and deploying Interact.

Use the Installation Roadmap section to obtain a broad understanding about using the Interact Installation Guide.

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### Installation roadmap

Use the installation roadmap to quickly find the information that you need for installing Interact.

You can use the following table to scan the tasks that must be completed for installing Interact:

*Table 1. Interact installation roadmap*

Topic	Information
Chapter 1, "Installation overview"	This chapter provides the following information: <ul style="list-style-type: none"><li>• "How the installers work" on page 3</li><li>• "Modes of installation" on page 3</li><li>• "Interact documentation and help" on page 4</li></ul>
Chapter 2, "Planning the Interact installation," on page 7	This chapter provides the following information: <ul style="list-style-type: none"><li>• "Prerequisites" on page 7</li><li>• "Interact installation worksheet" on page 8</li><li>• "Installation order for IBM EMM products" on page 11</li></ul>
Chapter 3, "Preparing data sources for Interact," on page 15	This chapter provides the following information: <ul style="list-style-type: none"><li>• "Creating databases or schemas" on page 15</li><li>• "Creating ODBC or native connections" on page 16</li><li>• "Configuring the web application server for your JDBC driver" on page 17</li><li>• "Creating JDBC connections in the web application server" on page 18</li></ul>

Table 1. Interact installation roadmap (continued)

Topic	Information
Chapter 4, "Installing Interact," on page 23	<p>This chapter provides the following information:</p> <ul style="list-style-type: none"> <li>• "Interact components" on page 23</li> <li>• "Installing Interact by using the GUI mode" on page 24</li> <li>• "Installing Interact by using the console mode" on page 28</li> <li>• "Installing Interact silently" on page 30</li> <li>• "Interact Report Package components" on page 31</li> </ul>
Chapter 5, "Configuring Interact before deployment," on page 33	<p>This chapter provides the following information:</p> <ul style="list-style-type: none"> <li>• "Creating and populating the Interact system tables" on page 33.</li> <li>• "Creating Interact user profile tables" on page 36</li> <li>• "Registering Interact manually" on page 37</li> </ul>
Chapter 6, "Deploying Interact," on page 39	<p>This chapter provides the following information:</p> <ul style="list-style-type: none"> <li>• "Deploying Interact on WebSphere Application Server" on page 39</li> <li>• "Deploying Interact on WebLogic" on page 41</li> </ul>
Chapter 7, "Configuring Interact after deployment," on page 43	<p>This chapter provides the following information:</p> <ul style="list-style-type: none"> <li>• "Configuring Interact runtime environment properties" on page 43</li> <li>• "Multiple Interact runtime servers" on page 44</li> <li>• "Configuring the test run data source" on page 45</li> <li>• "Adding server groups" on page 46</li> <li>• "Selecting a server group for interactive flowchart test run" on page 46</li> <li>• "Configuring the contact and response history module" on page 47</li> <li>• "Creating Interact system users" on page 47</li> <li>• "Verifying the Interact installation" on page 49</li> </ul>
Chapter 8, "Configuring multiple partitions for Interact," on page 51	<p>This chapter provides the following information:</p> <ul style="list-style-type: none"> <li>• "How multiple partitions work" on page 51</li> <li>• "Setting up multiple partitions for the Interact design time environment" on page 52</li> </ul>
Chapter 9, "Uninstalling Interact," on page 55	<p>This chapter provides information about how to uninstall Interact.</p>

Table 1. Interact installation roadmap (continued)

Topic	Information
Chapter 10, “configTool,” on page 57	This chapter provides information about how to use the <b>configTool</b> utility.

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## How the installers work

You must use the suite installer and the product installer when you install any IBM® EMM product. For example, for installing Interact, you must use the IBM EMM suite installer and the IBM Interact installer.

Make sure that you use the following guidelines before you use the IBM EMM suite installer and the product installer:

- The suite installer and the product installer must be in the same directory on the computer where you want to install the product. When multiple versions of a product installer are present in the directory with the master installer, the master installer always shows the latest version of the product on the IBM EMM Products screen in the installation wizard.
- If you are planning to install a patch immediately after you install an IBM EMM product, make sure that the patch installer is in the same directory as that of the suite and product installers.
- The default top-level directory for IBM EMM installations is /IBM/EMM for UNIX or C:\IBM\EMM for Windows. However, you can change the directory during installation.

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## Modes of installation

The IBM EMM suite installer can run in one of the following modes: GUI mode, console mode, or silent mode (also called the unattended mode). Select a mode that suits your requirements when you install Interact.

### GUI mode

Use the GUI mode for Windows or the X Window System mode for UNIX to install Interact by using the graphical user interface.

### Console mode

Use the console mode to install Interact by using the command-line window.

**Note:** To display the Installer screens correctly in console mode, configure your terminal software to support UTF-8 character encoding. Other character encoding, such as ANSI, will not render the text correctly, and some information will not be readable.

### Silent mode

Use the silent or unattended mode to install Interact multiple times. The silent mode uses response files for installation, and does not require user input during the installation process.

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## Interact documentation and help

Interact provides documentation and help for users, administrators, and developers.

Use the following table to get information about how to get started with Interact:

*Table 2. Get up and running*

<b>Task</b>	<b>Documentation</b>
View a list of new features, known issues, and workarounds	<i>IBM Interact Release Notes</i>
Learn about the structure of the Interact database	<i>IBM Interact System Tables and Data Dictionary</i>
Install or upgrade Interact and deploy the Interact web application	One of the following guides: <ul style="list-style-type: none"><li>• <i>IBM Interact Installation Guide</i></li><li>• <i>IBM Interact Upgrade Guide</i></li></ul>
Implement the IBM Cognos® reports provided with Interact	<i>IBM EMM Reports Installation and Configuration Guide</i>

Use the following table to get information about how to configure and use Interact:

*Table 3. Configure and use Interact*

<b>Task</b>	<b>Documentation</b>
<ul style="list-style-type: none"><li>• Maintain users and roles</li><li>• Maintain data sources</li><li>• Configure Interact optional offer serving features</li><li>• Monitor and maintain runtime environment performance</li></ul>	<i>IBM Interact Administrator's Guide</i>
<ul style="list-style-type: none"><li>• Work with interactive channels, events, learning models, and offers</li><li>• Create and deploy interactive flowcharts</li><li>• View Interact reports</li></ul>	<i>IBM Interact User's Guide</i>
Use Interact macros	<i>IBM Macros for IBM EMM: User's Guide</i>
Adjust components to obtain optimal performance	<i>IBM Interact Tuning Guide</i>

Use the following table to get information about how to get help if you face issues when you use Interact:

*Table 4. Get help*

<b>Task</b>	<b>Instructions</b>
Open online help	<ol style="list-style-type: none"><li>1. Choose <b>Help &gt; Help for this page</b> to open a context-sensitive help topic.</li><li>2. Click the <b>Show Navigation</b> icon in the help window to display the full help.</li></ol>



Table 4. Get help (continued)

Task	Instructions
Obtain PDFs	Use either of the following methods: <ul style="list-style-type: none"><li data-bbox="967 296 1430 352">• Choose <b>Help &gt; Product Documentation</b> to access Interact PDFs.</li><li data-bbox="967 359 1406 443">• Choose <b>Help &gt; All IBM EMM Suite Documentation</b> to access all available documentation.</li></ul>
Get support	Go to <a href="http://www.ibm.com/support">http://www.ibm.com/support</a> to access the IBM Support Portal.



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## Chapter 2. Planning the Interact installation

When you plan your Interact installation, you must ensure that you have set up your system correctly, and that you have configured your environment to deal with any failures.

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### Prerequisites

Before you install or upgrade any IBM EMM product, you must ensure that your computer complies with all the prerequisite software and hardware.

#### System requirements

For information about system requirements, see the *Recommended Software Environments and Minimum System Requirements* guide.

#### Network domain requirements

The IBM EMM products that are installed as a suite must be installed on the same network domain to comply with the browser restrictions that are designed to limit the security risks that can occur with cross-site scripting.

#### JVM requirements

IBM EMM applications within a suite must be deployed on a dedicated Java™ virtual machine (JVM). IBM EMM products customize the JVM that is used by the web application server. If you encounter errors that are related to the JVM, you must create an Oracle WebLogic or WebSphere® domain that is dedicated to the IBM EMM products.

#### Knowledge requirements

To install IBM EMM products, you must have a thorough knowledge of the environment in which the products are installed. This knowledge includes knowledge about operating systems, databases, and web application servers.

#### Internet browser settings

Make sure that your internet browser complies with the following settings:

- The browser must not cache web pages.
- The browser must not block pop-up windows.

#### Access permissions

Verify that you have the following network permissions to complete the installation tasks:

- Administration access for all necessary databases
- Read and write access to the relevant directory and subdirectories for the operating system account that you use to run the web application server and IBM EMM components
- Write permission for all files that you must edit

- Write permission for all directories where you must save a file, such as the installation directory and backup directory if you are upgrading
- Appropriate read/write/execute permissions to run the installer

Verify that you have the administrative password for your web application server.

For UNIX, all installer files for IBM products must have full permissions, for example, `rwxr-xr-x`.

## **JAVA\_HOME environment variable**

If a **JAVA\_HOME** environment variable is defined on the computer where you install an IBM EMM product, verify that the variable points to a supported version of JRE. For information about system requirements, see the *Recommended Software Environments and Minimum System Requirements* guide.

Make sure that the **JAVA\_HOME** environment variable points to JRE 1.6. If the **JAVA\_HOME** environment variable points to an incorrect JRE, you must clear the **JAVA\_HOME** variable before you run the IBM EMM installers.

You can clear the **JAVA\_HOME** environment variable by using one of the following methods:

- Windows: In a command window, enter **set JAVA\_HOME=** (leave empty) and press Enter.
- UNIX: In the terminal, enter **export JAVA\_HOME=** (leave empty) and press Enter.

**export JAVA\_HOME=** (leave empty)

After the environment variable is cleared, the IBM EMM installers use the JRE that is bundled with the installers. You can reset the environment variable after the installation is complete.

## **Marketing Platform requirement**

You must install Marketing Platform before you install any IBM EMM products. For each group of products that work together, you must install Marketing Platform only once. Each product installer checks whether the required products are installed. If your product or version is not registered with Marketing Platform, a message prompts you to install or upgrade Marketing Platform before you proceed with your installation. Marketing Platform must be deployed and running before you can set any properties on the **Settings > Configuration** page.

## **Campaign requirement**

You must install and configure Campaign before you install the Interact design time environment.

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## **Interact installation worksheet**

Use the Interact installation worksheet to gather information about the database that contains your Interact system tables and about other IBM EMM products that are required for the installation of Interact.

**Note:** All the Interact data sources must be of the same type. For example, if your Campaign system tables are in Oracle databases, all the other databases must be Oracle.

## Runtime tables

Runtime tables contain deployment data from the design time environment, staging tables for contact and response history, and runtime statistics. You can have multiple databases that contain runtime tables.

Enter the database information for each runtime environment in the following table:

*Table 5. Information for the Interact runtime environment*

Database information	Notes
Database schema 1	
JNDI name 1	
Database schema 2	
JNDI name 2	
Database schema 3	
JNDI name 3	

## Contact response history tables

Contact response history tables are used when you implement cross-section tracking. The contact response history tables can be in the same schema as your Campaign contact response history tables, or they can be in a different database server or schema.

Enter the database information for the contact response history tables in the following table:

*Table 6. Information for the Interact contact response history tables*

Database information	Notes
Database schema	
JNDI name	

## Learning tables

Learning tables are used only if you want to use the Interact built-in learning feature. Learning tables are optional.

Enter the database information for the learning tables in the following table:

*Table 7. Information for the Interact learning tables*

Database information	Notes
Database schema	
JNDI name	

## User profile tables

User profile tables contain customer data that is required by interactive flowcharts to place visitors into smart segments.

Enter the database information for the user profile tables in the following table:

*Table 8. Information for the Interact user profile tables*

Database information	Notes
Database schema	
JNDI name	

## Test run tables

Test run tables are used for test runs of interactive flowcharts only. Test run tables contain data that is required by interactive flowcharts to place visitors into smart segments.

Enter the database information for the test run tables in the following table:

*Table 9. Information for the Interact test run tables*

Database information	Notes
Database schema	
DSN (ODBC or native connection name)	
JNDI name	

## Marketing Platform database information

The installation wizards for each IBM EMM product must be able to communicate with the Marketing Platform system table database to register the product. Each time that you run the installer, you must enter the following database connection information for the Marketing Platform system table database:

- Database type
- Database host name
- Database port
- Database name or schema ID
- User name and password for the database account
- JDBC connection URL to the Marketing Platform database

## Information about the web component

Obtain the following information for all IBM EMM products that have a web component, which you deploy on a web application server:

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

## IBM Site ID

If you are installing an IBM EMM product in one of the countries that is listed on the Country for Install screen of your product installer, you must enter your IBM Site ID in the space provided. Your IBM Site ID can be found on one of the following documents:

- IBM Welcome letter
- Tech Support Welcome letter
- Proof of Entitlement letter
- Other communications that are sent when you purchase your software

IBM might use the data that is provided by the software to better understand how customers use our products and to improve customer support. The data that is gathered does not include any information that identifies individuals. Complete the following actions if you do not want to have such information to be collected:

1. After Marketing Platform is installed, log in to Marketing Platform as a user with administration privileges.
2. Go to **Settings > Configuration**, and set the **Disable Page Tagging** property under the **Platform** category to True.

---

## Installation order for IBM EMM products

When you install or upgrade multiple IBM EMM products, you must install or upgrade them in a specific order.

The following table provides information about the order that you must follow when you install or upgrade multiple IBM EMM products:

*Table 10. Installation or upgrade order for IBM EMM products*

Product	Installation or upgrade order
Campaign (with or without eMessage)	<ol style="list-style-type: none"><li>1. Marketing Platform</li><li>2. Campaign</li></ol> <p><b>Note:</b> eMessage is installed automatically when you install Campaign. However, eMessage is not configured or enabled during the Campaign installation process.</p>

Table 10. Installation or upgrade order for IBM EMM products (continued)

Product	Installation or upgrade order
Interact	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Campaign</li> <li>3. Interact Design Time environment</li> <li>4. Interact Run Time environment</li> <li>5. Interact Extreme Scale Server</li> </ol> <p>If you want to install or upgrade the Interact design time environment only, then install or upgrade the Interact design time environment in the following order:</p> <ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Campaign</li> <li>3. Interact Design Time environment</li> </ol> <p>If you want to install or upgrade the Interact runtime environment only, then install or upgrade the Interact runtime environment in the following order:</p> <ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Interact Run Time environment</li> </ol> <p>If you want to install the Interact Extreme Scale Server only, then install the Interact Extreme Scale Server in the following order:</p> <ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Interact Run Time environment</li> <li>3. Interact Extreme Scale Server</li> </ol>
Marketing Operations	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Marketing Operations</li> </ol> <p><b>Note:</b> If you are integrating Marketing Operations with Campaign, you must also install Campaign. The order of installation for those two products does not matter.</p>
Distributed Marketing	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Campaign</li> <li>3. Distributed Marketing</li> </ol>
Interaction History	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Interaction History</li> </ol>
Attribution Modeler	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Interaction History</li> <li>3. Attribution Modeler</li> </ol>
Contact Optimization	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Campaign</li> <li>3. Contact Optimization</li> </ol>



Table 10. Installation or upgrade order for IBM EMM products (continued)

Product	Installation or upgrade order
Opportunity Detection	<ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Opportunity Detection</li> </ol> <p>If Opportunity Detection is integrated with Interact, install the products in the following order:</p> <ol style="list-style-type: none"> <li>1. Marketing Platform</li> <li>2. Campaign</li> <li>3. Interact</li> <li>4. Opportunity Detection</li> </ol>
IBM SPSS® Modeler Advantage Marketing Edition	<ol style="list-style-type: none"> <li>1. IBM SPSS Modeler Advantage Marketing Edition</li> </ol>



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## Chapter 3. Preparing data sources for Interact

The Interact runtime environment uses data sources to store user and interaction data.

Complete the following steps to prepare data sources for Interact:

1. Create a database or a database schema for the Interact system tables.
2. Create a system user account. The system user account must have the following rights: CREATE, DELETE, DROP, INSERT, SELECT, and UPDATE.
3. Create ODBC or native connections.
4. Configure the web application server for your JDBC driver.
5. Create JDBC data sources in the web application server.

---

### Creating databases or schemas

Set up data sources so that the Interact system can store user and interaction data. You can use your Campaign Customer (user) tables or set up unique data sources based on the type of data that is stored.

Complete the following steps to create databases or schemas for Interact:

1. Create a database or a database schema for the Interact system tables. The following table provides information about vendor-specific guidelines while creating a database or a database schema for the Interact system tables:

Table 11. Guidelines for creating databases or schemas

Database vendor	Guidelines
Oracle	Enable the auto commit feature for the environment open. See the Oracle documentation for instructions.
DB2®	Set the database page size to at least 16K, or 32K if you need to support Unicode. See the DB2 documentation for instructions.
SQL Server	Use either the SQL Server authentication, or both the SQL Server and Windows authentication, because Marketing Platform requires SQL Server authentication. If necessary, change the database configuration so that your database authentication includes SQL Server. Also, be sure that TCP/IP is enabled in your SQL Server.

**Note:** If you plan to enable locales that use locales that use multi-byte characters, such as Chinese, Korean, and Japanese, ensure that the database is created to support them.

2. Create a system user account.  
The account that you create must have at least CREATE, SELECT, INSERT, UPDATE, DELETE, and DROP rights.
3. Obtain information about your databases or schemas and database accounts and then print and add the information to the “Interact installation worksheet” on page 8. You can use this information later in the installation process.

## Required databases or schemas for Interact

The Interact runtime environment requires several databases to hold user and interaction data. You can use your Campaign Customer (user) tables or set up a unique data source.

The Interact design time environment tables are automatically added to the database or schema that holds the Campaign system tables.

According to the type of data that must be stored, determine how many databases or schemas you must create for use with the Interact runtime environment.

The following list provides a brief summary of the databases or schemas that are required for the Interact runtime environment:

- Database or schema to hold the Interact runtime tables. There must be a separate database or schema for each server group.
- Database, schema, or view to hold the user profile tables. The user profile tables can be in the same database as your Campaign Customer (user) tables. There can be a separate set of user profile tables for each interactive channel.
- Database, schema, or view to hold the test run tables. The test run tables can be in the same database as your Campaign Customer (user) tables.
- If you want to use built-in learning, there must be a database or schema to hold the learning tables.
- If you want to use cross-session response tracking, there must be a database or schema to hold a copy of the Campaign contact history tables. Alternatively, instead of creating a copy, you can use the Campaign system tables database to run the cross-session response tracking scripts.

---

## Creating ODBC or native connections

Create ODBC or native connections so that the Campaign server can access the database that contains the Interact test run tables of the design time environment. Create ODBC or native connections on the computer where you installed the Campaign server.

If you use the Campaign customer (user) tables as your test run tables, then the ODBC connection is already created when Campaign was installed.

If the Interact design time environment test run tables are not the same as your customer (user) tables, use the following guidelines to create the ODBC or native connection to the database that holds them:

- For databases on UNIX: Create a new native data source in an ODBC.ini file. The procedure for creating a native data source differs depending on the data source type and the version of UNIX. See the data source and operating system documentation for specific ODBC driver installation and configuration instructions.
- For databases on Windows: Browse to Control Panel and click **Administrative Tools > Data Sources (ODBC)** to create an ODBC data source.

Record the connection names in the “Interact installation worksheet” on page 8.

## Configuring the web application server for your JDBC driver

Interact requires the correct JAR file to support JDBC connections. You must add the location of the JAR file to the class path of the web application server where you plan to deploy Interact.

Complete the following steps to configure the web application server for your JDBC driver:

1. Obtain the latest vendor-provided Type 4 JDBC driver that is supported by IBM EMM, as described in the *Recommended Software Environments and Minimum System Requirements* guide.

Use the following guidelines after you obtain the JDBC driver:

- If the driver does not exist on the server where you plan to deploy Interact, obtain it and unpack it on the server. Unpack the drivers in a path that does not include spaces.
- If you obtain the driver from a server where the data source client is installed, verify that the version is the latest supported by Interact.

The following table lists the driver file name or names for the databases that are supported for the IBM EMM system tables:

Table 12. Driver files for the databases

Database	Files
Oracle	ojdbc6.jar, ojdbc5.jar
DB2	db2jcc.jar db2jcc4.jar- required for V10.1 db2jcc_license_cu.jar - not required in V9.5 and higher
SQL Server	Use version 2.0 of the SQL Server driver and above. See the <i>Recommended Software Environments &amp; Minimum System Requirements</i> guide for the exact version of the driver to use. sqljdbc4.jar

2. Add the full path to the driver, including the file name, to the class path of the web application server where you plan to deploy Interact.

According to the web application server where you plan to deploy Interact, use the following guidelines:

- For all supported versions of WebLogic, set the class path in the **setDomainEnv** script in the *WebLogic\_domain\_directory/bin* directory where environment variables are configured. Your driver entry must be the first entry in the class path list of values, before any existing values, to ensure that the web application server uses the correct driver. For example:

### UNIX

```
CLASSPATH="/home/oracle/product/11.0.0/jdbc/lib/ojdbc6.jar:  
${PRE_CLASSPATH}${CLASSPATHSEP}${WEBLOGIC_CLASSPATH}  
${CLASSPATHSEP}${POST_CLASSPATH}${CLASSPATHSEP}${WLP_POST_CLASSPATH}"  
export CLASSPATH
```

### Windows

```
set CLASSPATH=c:\oracle\jdbc\lib\ojdbc6.jar;%PRE_CLASSPATH%;  
%WEBLOGIC_CLASSPATH%;%POST_CLASSPATH%;%WLP_POST_CLASSPATH%
```

- For all supported versions of WebSphere, set the class path when you set up the JDBC providers for Interact.

3. Make a note of the database driver class path in the Interact installation worksheet, as you must enter the path when you run the installer.
4. Restart the web application server so that your changes take effect.  
During startup, monitor the console log to confirm that the class path contains the path to the database driver.

---

## Creating JDBC connections in the web application server

Create JDBC connections on each of the web application servers where Campaign and Interact is deployed. Campaign and Interact use the JDBC connections to access the required databases.

You can use the list to simplify configuration because the names in the list match the default values of the configuration properties that refer to the JDBC connections.

Use the following table to create JDBC connections to the databases that hold the Interact, Campaign, and Marketing Platform tables:

*Table 13. JDBC connections in the web application server*

Deployed web application	JDBC connections required to the databases
Campaign	<p>In the web application server where Campaign is deployed, create JDBC connections to the databases that hold the following tables:</p> <ul style="list-style-type: none"> <li>• Interact runtime tables JNDI name: InteractRTDS</li> <li>• Interact test run tables (which can be the same as the Customer (User) tables) JNDI name: testRunDataSource</li> </ul>

Table 13. JDBC connections in the web application server (continued)

Deployed web application	JDBC connections required to the databases
<p>Interact runtime environment</p> <p>(The Interact runtime environment is typically deployed in a different JVM from Campaign)</p>	<p>In the web application server where the Interact runtime environment is deployed, create JDBC connections to the databases that hold the following tables:</p> <ul style="list-style-type: none"> <li>• Interact runtime tables JNDI name: InteractRTDS</li> <li>• Interact profile tables JNDI name: prodUserDataSource</li> <li>• Interact test run tables (required for test run server group only) JNDI name: testRunDataSource</li> <li>• Interact learning tables (if you are using built-in learning) JNDI name: InteractLearningDS</li> <li>• Campaign contact and response history tables (if you are using cross-session response tracking) JNDI name: contactAndResponseHistoryDataSource</li> <li>• Marketing Platform system tables JNDI name: UnicaPlatformDS</li> </ul> <p><b>Important:</b> This is the required JNDI name for connections to the Platform system table database. You must set up the JDBC connection only if you install the Interact runtime environment in a web application server where Marketing Platform is not currently deployed. If Marketing Platform is deployed in the same web application server, the JDBC connection is already defined.</p> <p>All JNDI names are recommended, unless otherwise indicated.</p>

## Information for creating JDBC connections

Use default values when you create JDBC connections if specific values are not provided. For more information, see the application server documentation.

**Note:** If you are not using the default port setting for your database, make sure that you change it to the correct value.

### WebLogic

Use the following values if your application server is WebLogic:

#### SQLServer

- Database Driver: Microsoft MS SQL Server Driver (Type 4) Versions: 2008, 2008R2
- Default port: 1433
- Driver class: com.microsoft.sqlserver.jdbc.SQLServerDriver
- Driver URL: jdbc:sqlserver://  
<your\_db\_host>:<your\_db\_port>;databaseName=<your\_db\_name>
- Properties: Add user=<your\_db\_user\_name>

Oracle 11 and 11 g

- Driver: Other
- Default port: 1521
- Driver class: oracle.jdbc.OracleDriver
- Driver URL:  
jdbc:oracle:thin:@<your\_db\_host>:<your\_db\_port>:<your\_db\_service\_name>  
Enter the driver URL by using the format that is shown. IBM EMM applications do not allow the use of Oracle's RAC (Real Application Cluster) format for JDBC connections.
- Properties: Add user=<your\_db\_user\_name>

DB2

- Driver: Other
- Default port: 50000
- Driver class: com.ibm.db2.jcc.DB2Driver
- Driver URL: jdbc:db2://<your\_db\_host>:<your\_db\_port>/<your\_db\_name>
- Properties: Add user=<your\_db\_user\_name>

## WebSphere

Use the following values if your application server is WebSphere:

SQLServer

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

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

After you create the JDBC Provider and data source, go to the **Custom Properties** for the data source, and add, modify properties as follows.

- serverName=<your\_SQL\_server\_name>
- portNumber =<SQL\_Server\_Port\_Number>
- databaseName=<your\_database\_name>

Add the following custom property:

**Name:** webSphereDefaultIsolationLevel

**Value:** 1

**Datatype:** Integer

Oracle 11 and 11 g

- Driver: Oracle JDBC Driver
- Default port: 1521
- Driver class: oracle.jdbc.OracleDriver



- Driver URL:  
`jdbc:oracle:thin:@<your_db_host>:<your_db_port>:<your_db_service_name>`  
Enter the driver URL by using the format that is shown. IBM EMM applications do not allow the use of Oracle's RAC (Real Application Cluster) format for JDBC connections.

#### DB2

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

Add the following custom property:

**Name:** `webSphereDefaultIsolationLevel`

**Value:** 2

**Datatype:** Integer



---

## Chapter 4. Installing Interact

You must run the IBM EMM installer to start the installation of Interact. The IBM EMM installer starts the Interact installer during the installation process. Make sure that the IBM EMM installer and the product installer are saved at the same location.

Each time that you run the IBM EMM Suite installer, you must first enter database connection information for the Marketing Platform system tables. When the Interact installer starts, you must enter the required information for Interact.

After installing Interact, you can create an EAR file for your product, and you can install the reports package for your product. Creating the EAR file and installing the reports package are not mandatory actions.

**Important:** Before you install Interact, make sure that the available temporary space on the computer where you install Interact is more than three times the size of the Interact installer.

### Installation files

The installation files are named according to the version of the product and the operating system on which they must be installed, except UNIX. For UNIX, different installation files exist for the X Window System mode and the console mode.

The following table displays examples of the installation files that are named according to the product version and the operating system:

Table 14. Installation files

Operating system	Installation file
Windows: GUI and console mode	<i>Product_N.N.N.N_win64.exe</i> , where <i>Product</i> is the name of your product, <i>N.N.N.N</i> is the version number of your product, and Windows 64-bit is the operating system on which the file must be installed.
UNIX: X Window System mode	<i>Product_N.N.N.N_solaris64.bin</i> , where <i>Product</i> is the name of your product, and <i>N.N.N.N</i> is the version number of your product.
UNIX: Console mode	<i>Product_N.N.N.N.bin</i> , where <i>Product</i> is the name of your product, and <i>N.N.N.N</i> is the version number of your product. This file can be used for installation on all UNIX operating systems.

---

## Interact components

You must install a single instance of the Interact design time environment. In the design time environment, you define events, interaction points, smart segments, and treatment rules. You can install multiple Interact runtime servers to present offers to the customers.

Before you install the Interact design time environment, you must install and configure Campaign and an associated instance of Marketing Platform.

Before you install the Interact runtime environment, you must install a separate instance of Marketing Platform. A runtime environment must have an instance of Marketing Platform and at least one instance of the Interact runtime server. You can configure multiple instances of the Interact runtime server to work in the same runtime environment.

For best performance, install a runtime server on its own workstation, where no other IBM EMM products are installed.

The following table describes the components that you can select when you install Interact:

Table 15. Interact components

Component	Description
Interact Runtime Environment	<p>The Interact runtime server.</p> <p>You can integrate Interact runtime servers with a touchpoint, such as a website, to present offers that are based on real-time data.</p> <p>You can install multiple runtime servers in your environment and organize them into server groups. Each server group must have one instance of Marketing Platform that must be separate from the Marketing Platform for Campaign and separate from other server groups.</p>
Interact Design Time Environment	<p>The design time environment for Interact.</p> <p>You must install the design time environment on the same computer as Campaign. You must install only one design time environment.</p>
Interact Extreme Scale Server	<p>Install the Interact Extreme Scale Server component, if you want to improve the performance of the Interact runtime environment. The Interact runtime environment uses IBM WebSphere eXtreme Scale caching to enhance performance. If you want to install the Interact Extreme Scale Server component, you must install it for every instance of runtime server that you install.</p> <p>For more information, see the <i>IBM Interact Tuning Guide</i>.</p>

---

## Installing Interact by using the GUI mode

For Windows, use the GUI mode to install Interact. For UNIX, use the X Window System mode to install Interact.

**Important:** Before you use the GUI mode to install Interact, make sure that the available temporary space on the computer where you install Interact is more than three times the size of the Interact installer.

**Important:** If IBM EMM products are installed in a distributed environment, you must use the machine name rather than an IP address in the navigation URL for all of the applications in the suite.

Make sure that the IBM EMM installer and the Interact installers are in the same directory on the computer where you want to install Interact.

Make sure that you install Marketing Platform and Campaign before installing the Interact design time environment. For more information about installing Marketing Platform, see the *IBM Marketing Platform Installation Guide*. For more information about installing Campaign, see the *IBM Campaign Installation Guide*.

Complete the following actions to install Interact by using the GUI mode:

1. Go to the folder where you have saved the IBM EMM installer and double-click the installer to start it.
2. Click **OK** on the first screen to see the Introduction window.
3. Follow the instructions on the installer, and click **Next**. Use the information in the following table to take the appropriate actions on each window in the IBM EMM installer:

Table 16. IBM EMM installer GUI

Window	Description
Introduction	<p>This is the first window of the IBM EMM suite installer. You can open the Interact installation and upgrade guides from this window. You can also see a link for the installation and upgrade guides for the products whose installers are saved in the installation directory.</p> <p>Click <b>Next</b> to go to the next window.</p>
Response Files Destination	<p>Click the <b>Generate Response File</b> check box if you want to generate response files for your product. Response files store the information that is necessary for the installation of your product. You can use response files for an unattended installation of your product.</p> <p>In the <b>Response files destination</b> field, click <b>Choose</b> to browse for a destination where you want to save the response files. Alternatively, click <b>Restore Default Folder</b> to save the response files in the default C:\ location.</p> <p>Click <b>Next</b> to go to the next window.</p>
IBM EMM Products	<p>In the <b>Install Set</b> list, select <b>Custom</b> to select Interact as the product that you want to install.</p> <p>In the <b>Install Set</b> area, you can see all the products whose installation files are in the same directory on your computer.</p> <p>In the <b>Description</b> field, you can view the description of the product that you select in the <b>Install Set</b> area.</p> <p>Click <b>Next</b> to go to the next window.</p>

Table 16. IBM EMM installer GUI (continued)

Window	Description
Installation Directory	<p>In the <b>Specify the installation directory</b> field, click <b>Choose</b> to browse to the directory where you want to install your product.</p> <p>If you want to install the product in the folder where the installers are stored, click <b>Restore Default Folder</b>.</p> <p>Click <b>Next</b> to go to the next window.</p>
Select Application Server	<p>Select one of the following application servers for the installation:</p> <ul style="list-style-type: none"> <li>• IBM WebSphere</li> <li>• Oracle WebLogic</li> </ul> <p>Click <b>Next</b> to go to the next window.</p>
Platform Database Type	<p>Select the appropriate Marketing Platform database type.</p> <p>Click <b>Next</b> to go to the next window.</p>
Platform Database Connection	<p>Enter the following information about your database:</p> <ul style="list-style-type: none"> <li>• Database host name</li> <li>• Database port</li> <li>• Database name or System ID (SID)</li> <li>• Database user name</li> <li>• Database password</li> </ul> <p>Click <b>Next</b> to go to the next window.</p>
Platform Database Connection (continued)	<p>Review and confirm the JDBC connection.</p> <p>Click <b>Next</b> to go to the next window.</p>
Preinstallation Summary	<p>Review and confirm the values that you added during the installation process.</p> <p>Click <b>Install</b> to start the installation process.</p> <p>The IBM Interact installer opens.</p>

- Follow the instructions on the Interact installer to start installing Interact. Use the information in the following table to navigate through the Interact installer and take appropriate actions on each window in the IBM Interact installer:

Table 17. IBM Interact installer GUI

Window	Description
Introduction	<p>This is the first window of the IBM Interact installer. You can open the installation guide, upgrade guide and all documentation available for Interact from this window.</p> <p>Click <b>Next</b> to go to the next window.</p>
Software License Agreement	<p>Carefully read the agreement. Use <b>Print</b> to print the agreement. Click <b>Next</b> after you accept the agreement.</p>

Table 17. IBM Interact installer GUI (continued)

Window	Description
Installation Directory	<p>Click <b>Choose</b> to browse to the directory where you want to install Interact.</p> <p>Click <b>Next</b> to go to the next window.</p>
Interact Components	<p>In the <b>Install Set</b> list, select <b>Typical</b> to install only the Interact Runtime Environment.</p> <p>In the <b>Install Set</b> area, select <b>Custom</b> to install the Interact Runtime Environment, Interact Extreme Scale Server, and Interact Design Time Environment.</p> <p>In the <b>Description</b> field, you can view the description of the item that you select in the <b>Install Set</b> area.</p> <p>Click <b>Next</b> to go to the next window.</p>
Preinstallation Summary	<p>Review and confirm the values that you added during the installation process.</p> <p>Click <b>Install</b> to start the Interact installation.</p>
Installation Complete	<p>Use this window to view information about the locations of log files that are created during installation.</p> <p>Click <b>Done</b> to exit the IBM Interact installer and to go back to the IBM EMM suite installer.</p>

- Follow the instructions on the IBM EMM installer to finish installing Interact. Use the information in the following table to take the appropriate actions on each window in the IBM EMM installer:

Table 18. IBM EMM installer GUI

Window	Description
Deployment EAR file	<p>Specify whether you want to create an enterprise archive (EAR) file to deploy your IBM EMM products.</p> <p>Click <b>Next</b> to go to the next window.</p>
Package EAR file	<p>You can see this window if you select <b>Create an EAR file for deployment</b> in the Deployment EAR file window.</p> <p>Select the applications that you want to package in the EAR file.</p>
EAR file details	<p>Enter the following information for your EAR file:</p> <ul style="list-style-type: none"> <li>Enterprise application identifier</li> <li>Display name</li> <li>Description</li> <li>EAR file path</li> </ul>

Table 18. IBM EMM installer GUI (continued)

Window	Description
Deployment EAR file	Select <b>Yes</b> or <b>No</b> to create an additional EAR file. If you select <b>Yes</b> , you must enter the details for the new EAR file.  Click <b>Next</b> to complete the installation of your product.
Installation Complete	Use this window to view information about the installation log, error log, and output log of your installation.  Click <b>Done</b> to exit the IBM EMM installer.

## Creating an EAR file after running the installer

You create EAR files after you install IBM EMM products. You might do this to have a different combination of products in EAR file.

**Note:** Run the installer in console mode from the command line.

Use the following procedure if you want to create an EAR file after you install IBM EMM products:

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

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

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

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

---

## Installing Interact by using the console mode

Use the console mode to install Interact by using the command-line window. You can select various options in the command-line window to complete tasks such as selecting the products to install, or selecting the home directory for the installation.

Before you install Interact, make sure that you have configured the following elements:



- An application server profile
- A database schema.

To display the Installer screens correctly in console mode, configure your terminal software to support UTF-8 character encoding. Other character encoding, such as ANSI, will not render the text correctly, and some information will not be readable.

Complete the following actions to install Interact by using the command-line window:

1. Open a command-line prompt window and navigate to the directory where you have saved the IBM EMM installer and the Interact installer.
2. Complete one of the following actions:
  - For Windows, enter the following command:  
`ibm_emm_installer_full_name -i console`  
 For example, `IBM_EMM_Installer_9.1.0.0 -i console`
  - For Unix, invoke the `ibm_emm_installer_full_name.sh` file.  
 For example: `IBM_EMM_Installer_9.1.0.0.sh`
3. Follow the directions that are displayed in the command-line prompt. Use the following guidelines when you have to select an option in the command-line prompt:
  - The default options are defined by the symbol [X].
  - To select or clear an option, type the number that is defined for the option, and then press Enter.

For example, suppose the following list displays the components that you can install:

- 1 [X] Marketing Platform
- 2 [X] Campaign
- 3 Contact Optimization
- 4 Interaction History

If you want to install Interaction History, and do not want to install Campaign, enter the following command: **2,4**

The following list would then display the options that you selected:

- 1 [X] Marketing Platform
- 2 Campaign
- 3 Contact Optimization
- 4 [X] Interaction History

**Note:** Do not clear the option for Marketing Platform unless you have already installed it.

4. The IBM EMM installer launches the Interact installer during the installation process. Follow the instructions in the command-line prompt window of the Interact installer.
5. After you enter `quit` in the Interact installer command-line prompt window, the window shuts down. Follow the instructions in the command-line prompt window of the IBM EMM installer to complete the installation of Interact.

**Note:** If any error occurs during the installation, a log file is generated. You must exit the installer to view the log file.

---

## Installing Interact silently

Use the unattended or silent mode to install Interact multiple times.

Before you install Interact, make sure that you have configured the following elements:

- An application server profile
- A database schema

When you install Interact by using the silent mode, response files are used to obtain the information that is required during installation. You must create response files for a silent installation of your product. You can create response files by using one of the following methods:

- Using the sample response files as a template for creating your response files. The sample response files are included with your product installers in the ResponseFiles compressed archive. For more information about sample response files, see “Sample response files.”
- Running the product installers in the GUI (Windows) or X Window System (UNIX) mode or the console mode before you install the product in the silent mode. One response file is created for the IBM EMM suite installer, and one or more response files are created for your product installer. The files are created in the directory that you specify.

**Important:** For security reasons, the installer does not save database passwords in the response files. When you create response files, you must edit each response file to enter database passwords. Open each response file and search for PASSWORD to find where you must edit the response file.

When the installer runs in the silent mode, it looks for the response files in the following directories sequentially:

- In the directory where the IBM EMM installer is saved.
- In the home directory of the user who installs the product

Make sure that all response files are in the same directory. You can change the path where response files are read by adding arguments to the command line. For example: **-DUNICA\_REPLAY\_READ\_DIR="myDirPath" -f myDirPath/installer.properties**

Use the following command for Windows:

- **IBM\_EMM\_installer\_full\_name -i silent**

For example:

**IBM\_EMM\_Installer\_9.1.0.0\_win.exe -i silent**

Use the following command for Unix or Linux:

- **IBM\_EMM\_installer\_full\_name\_operating\_system.bin -i silent**

For example:

**IBM\_EMM\_Installer\_9.1.0\_unix.bin -i silent**

## Sample response files

You must create response files to set up a silent installation of Interact. You can use sample response files to create your response files. The sample response files are included with the installers in the ResponseFiles compressed archive.

The following table provides information about sample response files:

Table 19. Description of sample response files

Sample response file	Description
installer.properties	The sample response file for the IBM EMM master installer.
installer_product initials and product version number.properties	The sample response file for the Interact installer.  For example, installer_ucn.n.n.n.properties is the response file of the Campaign installer, where n.n.n.n is the version number.
installer_report pack initials, product initials, and version number.properties	The sample response file for the reports pack installer.  For example, installer_urpc.properties is the response file of the Campaign reports pack installer.

## Interact Report Package components

To use the reporting feature for Interact, install the IBM Cognos package and reporting schemas on the Marketing Platform system.

The following table describes the components that you can select when you install the report package for Interact:

Table 20. Interact Report Package components

Component	Description
IBMInteract reporting schemas (to be installed on the IBM EMM system)	The Interact reporting schemas make the following data from all Interact data sources available for reporting: <ul style="list-style-type: none"> <li>• Interactive channel-based campaign</li> <li>• Offers</li> <li>• Cells</li> </ul>
IBM Cognos package for IBM Interact (to be installed on the IBM Cognos system)	The IBM Cognos package includes the following components: <ul style="list-style-type: none"> <li>• A reporting metadata model for the Interact database tables</li> <li>• A set of example reports that you can use to track campaign, offer, and cell performance</li> </ul>

For information about installing the report package for Interact, see the *IBM EMM Reports Installation and Configuration Guide*.



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## Chapter 5. Configuring Interact before deployment

You must complete specific tasks before you deploy Interact. There are no pre-deployment configuration tasks for Interact Design Time and Interact Run Time.

---

### Creating and populating the Interact system tables

If you have not created and populated the system tables during the installation process, use your database client to run the Interact SQL scripts against the appropriate database or to create and populate the Interact runtime environment, design time environment, learning, user profile, and contact and response tracking data sources.

#### Design time environment tables

Before you can enable the Interact design time environment in Campaign, you must add some tables to your Campaign system table database.

The SQL scripts are in the *Interact\_HOME/interactDT/ddl* directory under your Interact design time environment installation.

If your Campaign system tables are configured for Unicode, use the appropriate script that is in the *Interact\_HOME/interactDT/ddl* directory in your Interact design time environment. There are no Unicode equivalent scripts for the **aci\_populate\_systab** scripts that are used to populate the design time environment tables.

Use the scripts in the following table to create the Interact design time environment tables:

Table 21. Scripts for creating design time environment tables

Data source type	Script name
IBM DB2	<b>aci_systab_db2.sql</b>  The user table space and system temporary table space where the Campaign system tables exist must each have a page size of 32K or greater.
Microsoft SQL Server	<b>aci_systab_sqlsvr.sql</b>
Oracle	<b>aci_systab_ora.sql</b>

Use the scripts in the following table to populate the Interact design time environment tables:

Table 22. Scripts for populating design time environment tables

Data source type	Script name
IBM DB2	<b>aci_populate_systab_db2.sql</b>
Microsoft SQL Server	<b>aci_populate_systab_sqlsvr.sql</b>

Table 22. Scripts for populating design time environment tables (continued)

Data source type	Script name
Oracle	<b>aci_populate_systab_ora.sql</b>

## Runtime environment tables

The SQL scripts are in the <Interact\_HOME>/ddl directory under your Interact installation.

If your Interact runtime tables are configured for Unicode, use the appropriate script that is in the <Interact\_HOME>/ddl/Unicode directory to create the runtime tables. There are no Unicode equivalent scripts for the **aci\_populate\_runtab** scripts that are used to populate the runtime tables.

You must run the SQL scripts once for each server group data source.

Use the scripts in the following table to create the Interact runtime tables:

Table 23. Scripts for creating runtime environment tables

Data source type	Script name
IBM DB2	<b>aci_runtab_db2.sql</b>  The user table space and system temporary table space where the Interact runtime environment tables exist must each have a page size of 32K or greater.
Microsoft SQL Server	<b>aci_runtab_sqlsvr.sql</b>
Oracle	<b>aci_runtab_ora.sql</b>

Use the scripts in the following table to populate the Interact runtime tables:

Table 24. Scripts for populating runtime environment tables

Data source type	Script name
IBM DB2	<b>aci_populate_runtab_db2.sql</b>  You must use the following command when you run the script: <b>db2 +c -td@ -vf aci_populate_runtab_db2.sql</b>
Microsoft SQL Server	<b>aci_populate_runtab_sqlsvr.sql</b>
Oracle	<b>aci_populate_runtab_ora.sql</b>

## Learning tables

You can use SQL scripts to create and populate tables for optional features such as learning, global offers, score override, and contact and response history tracking.

All the SQL scripts are in the <Interact\_HOME>/ddl directory.

**Note:** The built-in learning module requires a separate data source from the Interact runtime environment tables. For the built-in learning module, you must

create a data source to hold all the learning data. The separate data source can communicate with all server groups, which means you can learn from your different touchpoints at the same time.

If your Interact runtime tables are configured for Unicode, use the appropriate script that is in the `<Interact_HOME>/ddl/Unicode` directory to create the learning tables.

Use the scripts in the following table to create the Interact learning tables:

*Table 25. Scripts for creating learning tables*

Data source type	Script name
IBM DB2	<code>aci_lrntab_db2.sql</code>
Microsoft SQL Server	<code>aci_lrntab_sqlsvr.sql</code>
Oracle	<code>aci_lrntab_ora.sql</code>

## Contact and response history tables

You must run SQL scripts against the contact history tables if you want to use cross-session response tracking or the advanced learning feature.

All the SQL scripts are in the Interact installation directory.

**Note:** Using contact and response history features requires a separate data source from the Interact runtime environment tables. To use the contact and response history features, you must create a data source to reference contact and response data. The separate data source can communicate with all server groups.

If your contact history tables are configured for Unicode, use the appropriate script that is in the Unicode directory under the same location as the standard script to create the learning tables.

Use the scripts in the following table to create the Interact contact and response history tables:

*Table 26. Scripts for creating contact history tables*

Data source type	Script name
IBM DB2	<ul style="list-style-type: none"> <li><code>aci_crhtab_db2.sql</code> in the <code>&lt;Interact_HOME&gt;/ddl/</code> directory.</li> <li><code>aci_lrnfeature_db2.sql</code> in the <code>&lt;Interact_HOME&gt;/interactDT/ddl/acifeatures/</code> directory.</li> </ul>
Microsoft SQL Server	<ul style="list-style-type: none"> <li><code>aci_crhtab_sqlsvr.sql</code> in the <code>&lt;Interact_HOME&gt;/ddl/</code> directory.</li> <li><code>aci_lrnfeature_sqlsvr.sql</code> in the <code>&lt;Interact_HOME&gt;/interactDT/ddl/</code> directory.</li> </ul>
Oracle	<ul style="list-style-type: none"> <li><code>aci_crhtab_ora.sql</code> in the <code>&lt;Interact_HOME&gt;/ddl/</code> directory.</li> <li><code>aci_lrnfeature_ora.sql</code> in the <code>&lt;Interact_HOME&gt;/interactDT/ddl/</code> directory.</li> </ul>

---

## Creating Interact user profile tables

Some features of Interact, such as global offers, offer suppression, and score override, require specific tables in your user profile databases. Run SQL scripts to create the required user tables.

Use your database client to run the appropriate SQL scripts against the appropriate database or schema and create the required user tables. If you have multiple audience levels defined, you must create a table for each audience level.

For more information about the profile database, and the role that offer suppression, global offers, and score override tables play in offer serving, see the *IBM Interact Administrator's Guide*.

### User profile tables

You must use SQL scripts to create the following optional profile tables:

- Global offers table (UACI\_DefaultOffers)
- Offer suppression table (UACI\_BlackList)
- Score override table (UACI\_ScoreOverride)

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

You must run the SQL scripts once for every audience level. Modify the script for each audience level, after the first, and rename the profile tables that are created after you run the scripts.

Use the scripts in the following table to create the Interact user profile tables:

*Table 27. Scripts for creating user profile tables*

Data source type	Script name
IBM DB2	<code>aci_usrtab_db2.sql</code>
Microsoft SQL Server	<code>aci_usrtab_sqlsvr.sql</code>
Oracle	<code>aci_usrtab_ora.sql</code>

### Advanced scoring (optional)

For Interact built-in learning, you can use the advanced scoring feature to override components of the Interact learning algorithm.

All the SQL scripts are in the `ddl/aci/features` directory under your Interact installation.

If your scoring tables are configured for Unicode, use the appropriate script in the `ddl/aci/features/Unicode` directory under your Interact installation to create the learning tables. You must run the SQL scripts against the User Profile database.

Use the scripts in the following table to create the Interact scoring tables:

*Table 28. Scripts for creating advanced scoring tables*

Data source type	Script name
IBM DB2	<code>aci_scoringfeature_db2.sql</code>



Table 28. Scripts for creating advanced scoring tables (continued)

Data source type	Script name
Microsoft SQL Server	<b>aci_scoringfeature_sqlsvr.sql</b>
Oracle	<b>aci_scoringfeature_ora.sql</b>

## Running database scripts to enable Interact features

To use the optional features that are available in Interact, run database scripts against the database to create tables or update existing tables.

Your Interact installation, both the design time environment and runtime environment, includes feature **ddl** scripts. The **ddl** scripts add required columns to your tables.

To enable any of the optional features, run the appropriate script against the database or table that is indicated.

dbType is the database type, such as sqlsvr for Microsoft SQL Server, ora for Oracle, or db2 for IBM DB2.

Use the following table to run database scripts against the database to create tables or update existing tables:

Table 29. Database scripts

Feature Name	Feature Script	Run Against	Change
Global offers, offer suppression, and score override	<b>aci_usrtab_dbType.sql</b> in <i>Interact_Home\ddl\acifeatures\</i> (Runtime environment installation directory)	Your profile database (userProdDataSource)	Creates the UACI_DefaultOffers, UACI_BlackList, and UACI_ScoreOverride tables.
Scoring	<b>aci_scoringfeature_dbType.sql</b> in <i>Interact_Home\ddl\acifeatures\</i> (Runtime environment installation directory)	Score override tables in your profile database (userProdDataSource)	Adds the LikelihoodScore and AdjExploreScore columns.
Learning	<b>aci_lrnfeature_dbType.sql</b> in <i>Interact_Home\interactDT\ddl\acifeatures\</i> (Design time environment installation directory)	Campaign database that contains your contact history tables	Adds the columns RTSelectionMethod, RTLearningMode, and RTLearningModelID to the UA_DtlContactHist table. Also adds the columns RTLearningMode and RTLearningModelID to the UA_ResponseHistory table. This script is also required by the reporting features provided by the optional Interact Reports Pack.

## Registering Interact manually

If the Interact installer cannot connect to the Marketing Platform database during the installation process, you must register Interact manually.

You must import the Interact information into the Marketing Platform system tables manually after the installer closes to register Interact manually.

## Registering the Interact design time environment manually

Run the **configTool** utility to register the Interact design time environment manually if the environment was not automatically registered during the installation process.

The **configTool** utility imports menu items and sets configuration properties. You must run the **configTool** utility as many times as there are files.

The following commands can be used as an example to register the Interact design time environment manually:

- **configTool -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "full\_path\_to\_Interact\_DT\_installation\_directory\interactDT\conf\interact\_navigation.xml"**
- **configTool -v -i -o -p "Affinium|Campaign|about|components" -f "full\_path\_to\_Interact\_DT\_installation\_directory\interactDT\conf\interact\_subcomponent\_version.xml"**

The Interact design time environment configuration properties are included with the configuration properties for Campaign.

You can manually enable Interact by setting the **interactInstalled** property in the **Campaign > server > partitions > partitionNinternal** category to yes.

## Registering the Interact runtime environment manually

Run the **configTool** utility to register the Interact runtime environment manually if the environment was not automatically registered during the installation process.

The **configTool** utility imports configuration properties. You must run the **configTool** utility as many times as there are files.

**Important:** You must register only one instance of the Interact runtime environment with the Marketing Platform for each server group. All instances of Interact runtime server in a server group use the same set of configuration properties. If you register a second Interact runtime server with Marketing Platform, you can overwrite previous configuration settings.

Use the following example commands as guidelines to register the Interact runtime environment manually:

```
configTool -r Interact -f "full_path_to_Interact_RT_installation_directory\conf\interact_configuration.xml"
```

The Interact runtime environment has no graphical user interface, so there is no need to register any navigation files.

---

## Chapter 6. Deploying Interact

You must deploy the Interact runtime environment for every instance of the runtime server that you install. The Interact design time environment is deployed automatically with the Campaign EAR or WAR file.

You must know how to work with your web application server. Consult your web application server documentation for details.

### Deploying the design time environment

After you install Interact, the design time environment is deployed automatically when you deploy Campaign. After you deploy the Campaign.war file, configuration procedures automatically enable the Interact design time environment in Campaign. The Campaign.war file is in the Campaign installation directory.

### Deploying the runtime environment

You must deploy the Interact runtime environment by deploying the InteractRT.war file for every instance of the runtime server that you install or upgrade. For example, if six instances of a runtime server exist, you must install and deploy the Interact runtime environment six times. You can deploy the runtime environment on the same server as the design time environment, or you can deploy the Interact runtime environment on a separate server. The InteractRT.war is in the Interact installation directory.

**Note:** When you deploy the Interact runtime environment, the context root must be set to /interact. Do not use any other value for the context root, or navigation to the runtime environment, and within Interact runtime links and pages, do not operate correctly.

---

## Deploying Interact on WebSphere Application Server

You can deploy Interact runtime environment on supported versions of WebSphere Application Server (WAS) from a WAR file or EAR file. The Interact design time environment is deployed automatically with the Campaign EAR or WAR file.

**Note:** Make sure that multiple language encoding is enabled in WAS.

### Deploying Interact on WAS from a WAR file

You can deploy the Interact application from a WAR file on WAS.

Complete the following tasks before you deploy Interact:

- Confirm that your version of WebSphere meets the requirements in the *Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- Confirm that you created the data sources and database provider in WebSphere.

To deploy the Interact application WAR file on WAS, complete the following steps:

1. Go to the WebSphere Integrated Solutions Console.
2. Complete the following steps if your system tables are in DB2:

- a. Click the data source that you created. Go to the Custom Properties for the data source.
- b. Select the Custom properties link.
- c. Set the value for the **resultSetHoldability** property to 1.  
If you do not see the **resultSetHoldability** property, create the **resultSetHoldability** property and set its value to 1.
3. Go to **Applications > Application Types > WebSphere enterprise applications** and click **Install**.
4. In the Preparing for the application installation window, select the **Detailed - Show all options and parameters** check box and click **Next**.
5. Click **Continue** to see the Install New Application wizard.
6. Accept the default settings on the windows of the Install New Application wizard except the following windows:
  - In step 1 of the Install New Application wizard, select the **Precompile JavaServer Pages files** check box.
  - In step 3 of the installation wizard, set the **JDK Source Level** to 16.
  - In step 8 of the installation wizard, set the **Context Root** to `/interact`.
7. In the left navigation panel of WebSphere Integrated Solutions Console, navigate to **Applications > Application Types > WebSphere enterprise applications**.
8. In the Enterprise Applications window, click the `InteractRT.war` file.
9. In the **Web Module Properties** section, click **Session Management** and select the following check boxes:
  - **Override session management**
  - **Enable Cookies**
10. Click **Enable Cookies**, and in the **Cookie name** field, enter a unique cookie name.
11. In the **Applications > Enterprise Applications** section of the server, select the WAR file that you deployed.
12. In the **Detail Properties** section, select **Class loading and update detection**.
13. In the **Class loader order** section, select the **Classes loaded with local class loader first (parent last)** option.
14. For **WAR class loader policy**, select **Single class loader for application**.
15. Start your deployment.

## Deploying Interact on WAS from an EAR file

You can deploy the Interact application on WAS when Interact is a module within an EAR file.

You can deploy Interact by using an EAR file if you included Interact in an EAR file when you ran the IBM EMM installer.

Before you deploy Interact:

- Confirm that your version of WebSphere meets the requirements in the *Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- Confirm that you created the data sources and database provider in WebSphere.

To deploy Interact from an EAR file onto WebSphere Application Server, complete the following steps:

1. Go to the WebSphere Integrated Solutions Console.
2. If your system tables are in DB2, click the data source that you created. go to the Custom Properties for the data source. .
3. Select the Custom properties link.
4. Set the value for the **resultSetHoldability** property to 1.  
If you do not see the **resultSetHoldability** property, create the **resultSetHoldability** property and set its value to 1.
5. Go to **Applications > Application Types > WebSphere enterprise applications** and click **Install**.
6. In the Preparing for the application installation window, select the **Detailed - Show all options and parameters** check box and click **Next**.
7. Click **Continue** to see the Install New Application wizard.
8. Accept the default settings on the windows of the Install New Application wizard except the following windows:
  - In step 1 of the Install New Application wizard, select the **Precompile JavaServer Pages files** check box.
  - In step 3 of the installation wizard, set the **JDK Source Level** to 16.
  - In step 8 of the installation wizard, set the **Context Root** to /interact.
9. In the left navigation panel of WebSphere Integrated Solutions Console, navigate to **Applications > Application Types > WebSphere enterprise applications**.
10. In the Enterprise Applications window, select the EAR file that you want to deploy.
11. In the **Web Module Properties** section, click **Session Management** and select the following check boxes:
  - **Override session management**
  - **Enable Cookies**
12. Click **Enable Cookies**, and in the **Cookie name** field, enter a unique cookie name.
13. In the **Detail Properties** section, select **Class loading and update detection**.
14. In the **Class loader order** section, select the **Classes loaded with local class loader first (parent last)** option.
15. Start your deployment.  
For more information about WebSphere Application Server version 8, see Welcome to the WebSphere Application Server information center.

---

## Deploying Interact on WebLogic

You can deploy IBM EMM products on WebLogic.

Use the following guidelines when you deploy Interact on WebLogic:

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

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

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

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

- If you are configuring WebLogic to use the IIS plug-in, review the WebLogic documentation.
- If deploying in a production environment, set the JVM memory heap size parameters to 1024 by adding the following line to the setDomainEnv script: Set `MEM_ARGS=-Xms1024m -Xmx1024m -XX:MaxPermSize=256m`

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

1. If you also use AIX® 7.1 with WL11g, remove the xercesImpl.jar file from the unpackaged WEB\_INF/lib directory.
2. Build the campaign.war file to include the changes that you made before deploying the war file.

---

## Chapter 7. Configuring Interact after deployment

After you deploy Interact, you must configure the Interact design time and runtime environments. Configuring the environments completes a basic installation of Interact.

The Interact configuration properties on the Configuration page are used to complete important functions. If you want, you can adjust the Interact configuration properties.

For more information about the properties, see the *IBM Interact Administrator's Guide* or the context help.

1. Complete the following steps to configure the Interact runtime environment after you deploy Interact:
  - a. Configure Interact runtime environment properties
  - b. Configure multiple Interact runtime servers
2. Complete the following steps to configure the Interact design time environment after you deploy Interact:
  - a. Configure the test run data source
  - b. Add server groups
  - c. Select a server group for interactive flowchart test run
  - d. Configure the contact and response history module
3. Optional: If you want to use the IBM EMM reporting feature, you must install the Reports Package for Interact. For more information about Interact reports, see the *IBM EMM Reports Installation and Configuration Guide*.

---

### Configuring Interact runtime environment properties

For Interact runtime operation, you must configure data sources for every server group in the Interact runtime environment.

You must configure the following configuration properties on the Configuration page for every server group:

- Data source for the profile tables for the runtime environment
- Data source for the runtime environment system tables
- Data source for the test run tables
- Data source for built-in learning tables

The data source properties are required only if you use built-in learning.

- Data source of the contact and response history tables for cross-session response tracking

The data source properties are required only if you use cross-session response tracking.

- Audience levels for the profile

The audience level configuration properties must match the audience levels that you define for Campaign. However, you must configure the audience levels that are used in interactive flowcharts only. Set the **Audience Levels** configuration property in the **Interact > profile** category.

---

## Multiple Interact runtime servers

When you install multiple Interact runtime servers, configure the runtime server group to use the same schema for runtime tables, profile tables, learning tables, and Marketing Platform.

For best performance, install each production Interact server group with its own instance of Marketing Platform, although this is not a firm requirement. By default, Interact runtime servers in the same server group use the same instance of Marketing Platform, as in the following example:

1. Install and configure Marketing Platform and the Interact runtime environment on the first server and ensure that they are configured and working correctly.
2. Install only Interact runtime environment on the second server. Provide the same Marketing Platform data source details and credentials that you used for the Marketing Platform installation on the first server. This configuration registers the second Interact server to use the same instance of Marketing Platform.
3. Deploy the Interact runtime WAR file on the second server.
4. Verify that Interact runtime environment is deployed and running correctly on the second server.
5. Use the URL of the first Interact runtime server and the second server in a single server group in your Interact design time configuration.

Although not required, you can also install a unique instance of Marketing Platform for each Interact runtime server, or a few instances of Marketing Platform that support subsets of runtime servers. For example, for your server group that contains 15 runtime servers, if five runtime servers report to one instance of Marketing Platform, you have a total of three instances of Marketing Platform for 15 runtime servers.

If you have multiple instances of Marketing Platform, the Interact configuration must match across all instances of Marketing Platform for a server group. You must define the same runtime tables, profile tables, and learning tables for all instances of Marketing Platform in each server group. All Interact servers that belong to the same server group must share user credentials. If you have separate Marketing Platform instances for each Interact server, you must create the same user and password on each instance of Marketing Platform.

If you install a test environment and have multiple Interact runtime servers on the same system, you must make sure that you complete the following requirements:

- Each Interact runtime server instance must be in a separate web application instance.
- If you configure JMX monitoring for Interact servers that are running on the same system, you must configure the JMX monitoring for each Interact runtime server to use a different port and instance name. Edit **JAVA\_OPTIONS** in your web application server startup script and add the following options:
  - **-Dinteract.jmx.monitoring.port=portNumber**
  - **-Dinteract.runtime.instance.name=instanceName**

You must also set the instance name if you use a database load utility to work with several Interact servers that run on the same computer.



## Configuring multiple Interact runtime servers

You can install multiple runtime servers in your environment and organize the servers into server groups. The Interact runtime servers enable the design time environment to complete test runs of interactive flowcharts.

When you install multiple Interact runtime servers, you must remove network connectivity for the Interact runtime computer before you run the installer. Removing the network connectivity ensures that additional Interact runtime server installations do not overwrite the Marketing Platform configuration.

After you install all instances of the Interact runtime server, restart Marketing Platform.

If possible, you must configure your server groups to work with a load balancer with persistent (sticky) sessions enabled. Alternatively, you can use a method of selecting runtime servers from a server group when you work with the Interact API.

If you cannot use a load balancer with persistent (sticky) sessions, you can configure the runtime servers in a server group to use a multicast address for sharing cache data. All the servers must comprise a single server group.

**Note:** If you use a distributed cache, you must enable multicast to work between all members of a server group.

To enable a distributed cache, configure the following configuration properties under the **Affinium | interact | cacheManagement | Cache Managers | EHCACHE | Parameter Data** category:

- **cacheType** - set to Distributed.
- **multicastIPAddress** - define the IP address that all the Interact servers for the server group use for listening. The IP address must be unique across your server groups.
- **multicastPort** - define the port that all the Interact servers use for listening.

**Note:** When you uninstall an Interact server from a server group, make sure that you do not accidentally remove all IBM EMM configuration.

---

## Configuring the test run data source

Add the Interact test run tables as a Campaign data source so that Campaign can complete test runs of interactive flowcharts.

To add additional Campaign data sources, add data source configuration properties to the **Campaign > partitions > partitionN>datasources** category on the Configuration page by using the appropriate data source template. For more information, see the *IBM Campaign Installation Guide*.

Use the **OwnerForTableDisplay** property to define a database schema to limit the tables that are displayed when you map tables in an interactive channel.

The test run data source that is used in the Interact design time environment must specify the JNDI name of the design time test run tables.

If you configure your Interact environment for multiple locales, see the *IBM Campaign Administrator's Guide* for information about configuring the encoding properties as required for your database type.

If you use an SQLServer database and you set your locale to Japanese or Korean, you must configure the following properties in the **Campaign > partitions > partitionN>datasources > testRunDataSource** category for the test run data source:

- **ODBCUnicode** - set to UCS-2
- **stringEncoding** - set to WIDEUTF-8

---

## Adding server groups

Create server groups for Campaign to complete test runs of interactive flowcharts. Define the location of at least one runtime server in the server group.

**Important:** You must fully install and deploy Marketing Platform for each server group. If you install multiple Interact server groups, you must fully install and deploy Marketing Platform for each runtime server group. Each Interact runtime server can be associated with one design time environment only.

You must define the locations of the Interact runtime servers on the Configuration page in Marketing Platform. The design time environment must be able to access the runtime servers for deploying and completing test runs of interactive flowcharts.

You must create at least one server group, and the server group must contain at least one Interact runtime server that is defined by the instance URL.

You can have multiple server groups. For example, you can have one server group to interact with your website, one server group to interact with your call center, and one server group for testing. Each server group can contain multiple instance URLs, and each instance URL can represent one instance of Interact runtime.

If you have multiple Interact design time systems running in your environment, an Interact runtime server that is configured with a design time cannot be configured with any other design time. If two different design times send deployment data to the same Interact runtime, the deployments can become corrupted and undefined behavior occurs.

For every server group in the Interact design time configuration, you must specify the JNDI name for the user profile tables. This is necessary to support runtime features in Interact, such as global offers, offer suppression, score override, and SQL offers in the **Interact List** process box.

Create server groups by setting the **serverGroup** configuration property in the **Campaign > partitions > partitionN>Interact > serverGroups** template category. The name is used only for organizational purposes. However, you can use the same name for the property as the **serverGroupName** property to avoid confusion.

---

## Selecting a server group for interactive flowchart test run

Select a server group from the server groups that you created so that Campaign can complete a test run of interactive flowcharts.

Interactive flowcharts require an instance of the Interact runtime to run. You cannot use the Campaign batch flowchart engine to run an interactive flowchart. You must define a server group for Campaign to reference for completing test runs of interactive flowcharts. The server group is used to validate the table mapping for the interactive channel, and check the syntax of user macros in interactive flowcharts.

Set the following configuration properties in the **Campaign > partitions > partitionN>Interact > flowchart** category to configure the test run of an interactive flowchart:

- **serverGroup**
- **dataSource**

The data source that you specify for the **dataSource** property must be a Campaign data source.

---

## Configuring the contact and response history module

You must make contact and response history data available for reporting and use with Campaign. You must copy the data from the staging tables in the Interact runtime servers to the Campaign contact and response history tables.

**Note:** You must configure the Interact runtime data source credentials in the design time environment configuration page for the contact and response history module to function.

Complete the following steps to collect contact and response history data for each Interact runtime server group:

1. Confirm that you have added the Interact runtime databases to the web application server that hosts Campaign.
2. Add a runtime data source by setting the **runtimeDataSource** configuration property in the **Campaign > partitions > partitionN > Interact > contactAndResponseHistTracking > runtimeDataSources** template category.
3. Repeat the preceding steps for each Interact runtime server group from which you want to collect contact and response history data.

---

## Creating Interact system users

The Interact runtime environment users work with the Interact runtime servers to send configuration data from the design time environment to the runtime environment. The Interact design time environment users can edit interactive flowcharts.

Interact has the following types of system users:

- **Runtime environment users** are IBM user accounts that are configured to work with the Interact runtime servers. The users must send the Interact configuration data from the design time environment to the runtime environment when they use JMX monitoring with the JMXMP protocol.
- **Design time environment users** are Campaign users. Configure the security for the various members of your design time team as described in the *IBM Campaign Administrator's Guide*.

## Runtime environment user

The Interact runtime user account must be an internal user account.

The person who sends Interact configuration data from the design time environment to the runtime environment must log in as an IBM EMM user. The internal user account must exist in the instance of the Marketing Platform that the Interact runtime server is dependent on.

All Interact servers that belong to the same server group must share user credentials for runtime deployment. If you have separate Marketing Platform instances for each Interact server, you must create an account with the same user login name and password on each Marketing Platform instance.

If you enable security for JMX monitoring with the JMXMP protocol, you might require a separate user for JMX monitoring security.

## Design time environment users

Configure the Interact design time environment users in the same way you configure Campaign users, as described in the *IBM Campaign Administrator's Guide*.

You must configure an Interact design time environment user to have all the permissions of a Campaign user to edit flowcharts.

For a Campaign user who has permission to edit interactive flowcharts, you must store data source credentials for the Interact test run tables in their account.

The following table provides information about the permissions that a Campaign user must have to edit campaigns, channels, and flowcharts:

Table 30. Permissions for design time environment users

Category	Permissions
Campaigns	<p>The following list provides information about the permissions that users must have to modify campaigns:</p> <ul style="list-style-type: none"><li>• View Campaign Interaction Strategies - Ability to see but not edit interaction strategy tabs in a campaign.</li><li>• Edit Campaign Interaction Strategies - Ability to change the interaction strategy tabs, including treatment rules.</li><li>• Delete Campaign Interaction Strategies - Ability to remove interaction strategy tabs from campaigns. Deletion of an interaction strategy tab is restricted if the interactive channel to which it is already assigned is deployed.</li><li>• Add Campaign Interaction Strategies - Ability to create new interaction strategy tabs in a campaign.</li><li>• Initiate Campaign Interaction Strategy Deployments - Ability to mark an interaction strategy tab for deployment or undeployment.</li></ul>

Table 30. Permissions for design time environment users (continued)

Category	Permissions
Interactive Channels	<p>The following list provides information about the permissions that users must have to modify interactive channels:</p> <ul style="list-style-type: none"> <li>• Deploy Interactive Channels - Ability to deploy an interactive channel to Interact runtime environments.</li> <li>• Edit Interactive Channels - Ability to change the interactive channels.</li> <li>• Delete Interactive Channels - Ability to remove interactive channels. Deletion of interactive channels is restricted if the interactive channel is already deployed.</li> <li>• View Interactive Channels - Ability to see but not edit interactive channels.</li> <li>• Add Interactive Channels - Ability to create new interactive channels.</li> <li>• View Interactive Channel Reports - Ability to see the analysis tab of the interactive channel.</li> <li>• Add Interactive Channel Child Objects - Ability to add interaction points, zones, events, and categories.</li> </ul>
Sessions	<p>The following list provides information about the permissions that users must have to modify flowcharts:</p> <ul style="list-style-type: none"> <li>• View Interactive Flowcharts - Ability to see an interactive flowchart in a session.</li> <li>• Add Interactive Flowcharts - Ability to create new interactive flowcharts in a session.</li> <li>• Edit Interactive Flowcharts - Ability to change the interactive flowcharts.</li> <li>• Delete Interactive Flowcharts - Ability to remove interactive flowcharts. Deletion of interactive flowcharts is restricted if the interactive channel to which this interactive flowchart is assigned is already deployed.</li> <li>• Copy Interactive Flowcharts - Ability to copy interactive flowcharts.</li> <li>• Test Run Interactive Flowcharts - Ability to initiate a test run of an interactive flowchart.</li> <li>• Review Interactive Flowcharts - Ability to see an interactive flowchart and open processes to view settings, but unable to make changes.</li> <li>• Deploy Interactive Flowcharts - Ability to mark an interactive flowcharts for deployment or undeployment.</li> </ul>

## Verifying the Interact installation

You must verify whether Interact is correctly installed by confirming that you can access the interactive channels and the Interact runtime URL.

1. To verify that the Interact design time environment is installed, log in to the IBM EMM console and confirm that you can access **Campaign > Interactive Channels**.
2. Complete the following steps to verify that the Interact runtime environment is correctly installed:
  - a. Access the Interact runtime URL by using a supported web browser.  
The runtime URL is:

`http://host.domain.com:port/interact/jsp/admin.jsp`

where *host.domain.com* is the computer where Interact is installed and *port* is the port number on which the Interact application server is listening.

b. Click **Interact Initialization Status**.

If the Interact server is running correctly, Interact responds with the following message:

System initialized with no errors!

If the initialization fails, review the installation procedure and confirm that you followed all the instructions.

---

## Chapter 8. Configuring multiple partitions for Interact

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

---

### How multiple partitions work

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

#### Partition benefits

Multiple partitions are useful for setting up strong security between groups of users, because each partition has its own set of Interact system tables. Multiple partitions cannot be used when groups of users must share data.

Each partition has its own set of configuration settings, and Interact can be customized for each group of users. However, all partitions share the same installation binaries. With the same binaries for all partitions, you can minimize the installation and upgrade efforts for multiple partitions.

#### Partition user assignment

Access to partitions is managed through membership in Marketing Platform groups.

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

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

#### Partition data access

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

- A user cannot access a partition if the user is not a member of a group that is assigned to a partition.
- A user of one partition cannot view or change data in another partition.
- Users cannot navigate the Interact file system above the root directory of their partition from the browse dialog boxes in Interact. For example, if two partitions, named `partition1` and `partition2` exist, and you belong to the group that is associated with `partition1`, you cannot navigate the directory structure for `partition2` from a dialog box.

## Setting up multiple partitions for the Interact design time environment

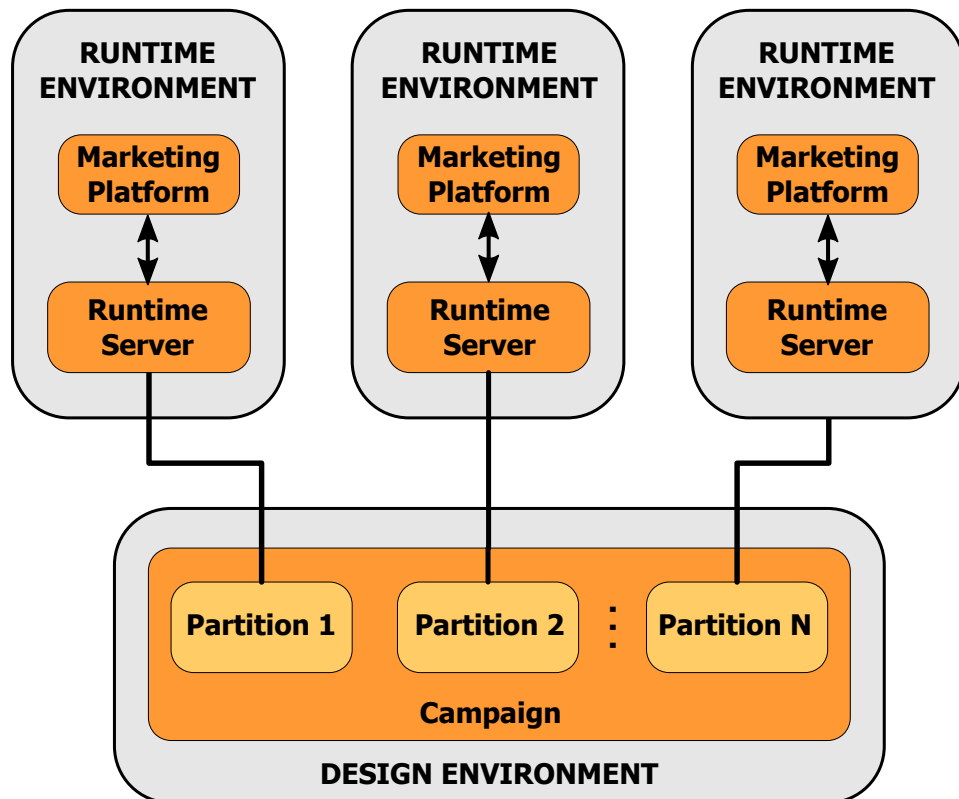
In the Campaign family of products, partitions provide a way to secure the data that is associated with different groups of users. You can create multiple partitions only for the Interact design time environment.

You can create multiple partitions to use with Campaign and the Interact design time environment. You can use partitions to configure Interact and Campaign so that different groups of users have access to different sets of Interact and Campaign data.

**Note:** The Interact runtime environment does not support multiple partitions. You cannot configure the Interact runtime environment to work in multiple partitions, nor can one Interact runtime environment work with multiple partitions from a design time.

If you set up multiple partitions with Campaign, you set up multiple partitions for Interact. You must configure each partition in the design time environment to communicate with a separate Interact runtime environment, including separate Marketing Platform and runtime tables. If you set up multiple partitions with Campaign, you must configure each partition to communicate with a separate Interact runtime environment.

The following diagram shows multiple partitions configured for Interact:



Complete the following steps to set up multiple partitions for the Interact design time environment:



1. You must manually enable Interact for each partition by setting the **interactInstalled** configuration property in the **Campaign > server > partitions > partitionNinternal** to yes.
2. Complete the following configuration steps for each partition:
  - a. Configure the test run data source
  - b. Add server groups
  - c. Select a server group for interactive flowchart test runs
  - d. Configure the contact and response history module



---

## Chapter 9. Uninstalling Interact

Run the Interact uninstaller to uninstall Interact. When you run the Interact uninstaller, the files that were created during the installation process are removed. For example, files such as configuration files, installer registry information, and user data are removed from the computer.

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

If you manually remove the files in your installation directory instead of running the uninstaller, the result might be an incomplete installation if you later reinstall an IBM product in the same location. After uninstalling a product, its database is not removed. The uninstaller only removes default files that are created during installation. Any file that is created or generated after installation is not removed.

In addition to the general instructions for uninstalling IBM EMM products, follow the guidelines when you uninstall Interact:

- If you have multiple Interact runtime installations using the same Marketing Platform installation, you must remove network connectivity for the Interact runtime workstation before you run the uninstaller. Failure to do so uninstalls the configuration data for all the other Interact runtime installations from Marketing Platform.
- You can safely ignore any warnings about failure to unregister with Marketing Platform.
- You can export a copy of your configuration as a precaution before uninstalling Interact.
- If you uninstall the Interact design time environment, after you run the uninstaller, you may need to manually unregister Interact. Use the **configtool** utility to unregister `full_path_to_Interact_DT_installation_directory\interactDT\conf\interact_navigation.xml`.

**Note:** On UNIX, the same user account that installed Interact must run the uninstaller.

Complete the following tasks to uninstall Interact:

1. If you have deployed the Interact web application, undeploy the web application from WebSphere or WebLogic.
2. Shut down WebSphere or WebLogic.
3. Stop the processes that are related to Interact.
4. If the `ddl` directory exists in the product installation directory, run the scripts that are provided in the `ddl` directory to drop tables from the system table database.
5. Complete one of the following steps to uninstall Interact:
  - Double-click the Interact uninstaller that exists in the `Uninstall_Product` directory. The uninstaller runs in the mode in which you installed Interact.

- In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Interact by using the console mode:

**Uninstall\_Product -i console**

- In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Interact by using the silent mode:

**Uninstall\_Product -i silent**

When you uninstall Interact by using the silent mode, the uninstallation process does not present any dialogs for user interaction.

**Note:** If you do not specify an option for uninstalling Interact, the Interact uninstaller runs in the mode in which Interact is installed.

---

## Chapter 10. configTool

The properties and values on the Configuration page are stored in the system tables. You can use the configTool utility to import and export configuration settings to and from the system tables.

### When to use configTool

You might want to use configTool for the following reasons.

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

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

### Syntax

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

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

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

```
configTool -vp -p "elementPath" -f importFile [-d]
```

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

### Commands

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

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

The element path must use the internal names of categories and properties. You can obtain them by going to the Configuration page, selecting the wanted category or property, and looking at the path that is displayed in parentheses in the right pane. Delimit a path in the configuration property hierarchy by using the | character, and surround the path with double quotation marks.

Note the following.

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

When you use `-d` with the `-vp` command, the `configTool` deletes any child nodes in the path you specify if those nodes are not included in the XML file you specify.

**`-i -p "parentElementPath" -f importFile [o]`**

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

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

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

The parent element path must use the internal names of categories and properties. You can obtain them by going to the Configuration page, selecting the required category or property, and looking at the path that is displayed in parentheses in the right pane. Delimit a path in the configuration property hierarchy by using the `|` character, and surround the path with double quotation marks.

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

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

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

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

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

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

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

**`-vp -p "elementPath" -f importFile [-d]`**

This command is used mainly in manual upgrades, to import configuration properties. If you applied a fix pack that contains a new configuration property, and you then upgrade, importing a configuration file as part of a manual upgrade process can override values that were set when the fix pack was applied. The `-vp` command ensures that the import does not override previously set configuration values.

**Important:** After you use the `configTool` utility with the `-vp` option, you must restart the web application server on which Marketing Platform is deployed so the changes are applied.

When you use `-d` with the `-vp` command, the `configTool` deletes any child nodes in the path you specify if those nodes are not included in the XML file you specify.

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

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

Note the following.

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

The `configTool` utility uses product names as parameters with the commands that register and unregister products. With the 8.5.0 release of IBM EMM, many product names changed. However, the names that are recognized by `configTool` did not change. The valid product names for use with `configTool` are listed below, along with the current names of the products.

*Table 31. Product names for configTool registration and unregistration*

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

Table 31. Product names for configTool registration and unregistration (continued)

Product name	Name used in configTool
CustomerInsight	Insight
Digital Analytics for On Premises	NetInsight
Opportunity Detection	Detect
Leads	Leads
Interaction History	InteractionHistory
Attribution Modeler	AttributionModeler
IBM SPSS Modeler Advantage Enterprise Marketing Management Edition	SPSS
Digital Analytics	Coremetrics

### **-u *productName***

Unregister an application that is specified by *productName*. You do not have to include a path to the product category; the product name is sufficient, and it is required. The process removes all properties and configuration settings for the product.

## **Options**

### **-o**

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

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

## **Examples**

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

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

```
configTool -i -p "Affinium|Campaign|partitions|partition1|dataSources" -f OracleTemplate.xml
```
- Export all configuration settings to a file named `myConfig.xml` in the `D:\backups` directory.  

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

```
configTool -x -p "Affinium|Campaign|partitions|partition1" -f partitionTemplate.xml
```
- Manually register an application named `productName`, by using a file named `app_config.xml` in the default `tools/bin` directory under the Marketing Platform installation, and force it to overwrite an existing registration of this application.



- ```
configTool -r product Name -f app_config.xml -o
```
- Unregister an application named productName.  

```
configTool -u productName
```



---

## Before you contact IBM technical support

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

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

### Information to gather

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

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

### System information

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

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

You can access the About page by selecting **Help > About**. If the About page is not accessible, check for a `version.txt` file that is located under the installation directory for your application.

### Contact information for IBM technical support

For ways to contact IBM technical support, see the IBM Product Technical Support website: ([http://www.ibm.com/support/entry/portal/open\\_service\\_request](http://www.ibm.com/support/entry/portal/open_service_request)).

**Note:** To enter a support request, you must log in with an IBM account. This account must be linked to your IBM customer number. To learn more about associating your account with your IBM customer number, see **Support Resources > Entitled Software Support** on the Support Portal.



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