

IBM Marketing Platform  
Version 9 Release 0  
January 15, 2013

## *Installation Guide*



**Note**

Before using this information and the product it supports, read the information in “Notices” on page 73.

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

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## Chapter 1. Preparing to install IBM

The installation process involves working with a number of software and hardware elements, including some that IBM® does not provide. The IBM documentation provides guidance for installing, configuring, and upgrading the IBM EMM product. For information about working with systems that IBM does not provide, see the documentation for those products.

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

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### Marketing Platform basic installation checklist

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

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

#### Prepare the Marketing Platform data source

1. “Step: Create the Marketing Platform system table database or schema” on page 5  
Create the Marketing Platform system table database or schema and record the information.
2. “Step: Configure the web application server for your JDBC driver” on page 6  
Add the database driver for the Marketing Platform system table database to the web application server classpath.
3. “Step: Create the JDBC connection in the web application server” on page 6  
Create a JDBC connection to the Marketing Platform system table database. Be sure to use UnicaPlatformDS as the JNDI name for the connection.

#### Install the Marketing Platform

1. Chapter 3, “Installing the IBM Marketing Platform,” on page 11  
Download the IBM and Marketing Platform installers.
2. “Step: Obtain required information” on page 17  
Gather the required database and web application server information.
3. “Step: Run the IBM installer” on page 18  
The IBM installer launches installers for all products it finds in the same directory.
4. “Step: Create and populate the Marketing Platform system tables manually, if necessary” on page 19  
If your company policy does not permit the installer to create the Marketing Platform system tables automatically, or if automatic creation did not occur due to a connection failure, create the tables manually.

#### Deploy the Marketing Platform

1. Chapter 4, “Deploying the IBM Marketing Platform,” on page 21  
Follow the specific guidelines for WebSphere® or WebLogic.
2. “Step: Verify your Marketing Platform installation” on page 23  
Log in to IBM EMM and check basic functions.

#### **Configure the Marketing Platform**

1. Chapter 5, “Configuring the IBM Marketing Platform After Deployment,” on page 25  
Optionally, set password constraints
2. If you plan to use the reporting feature in any of the IBM Enterprise products, see the *IBM EMM Reports Installation and Configuration Guide*.

---

## **Installing with other system components**

The following diagram provides an overview of where to install IBM applications. The diagram shows all the products, which are not all required for .

This setup represents a basic installation. You might require a more complex, distributed installation to meet your security and performance requirements.

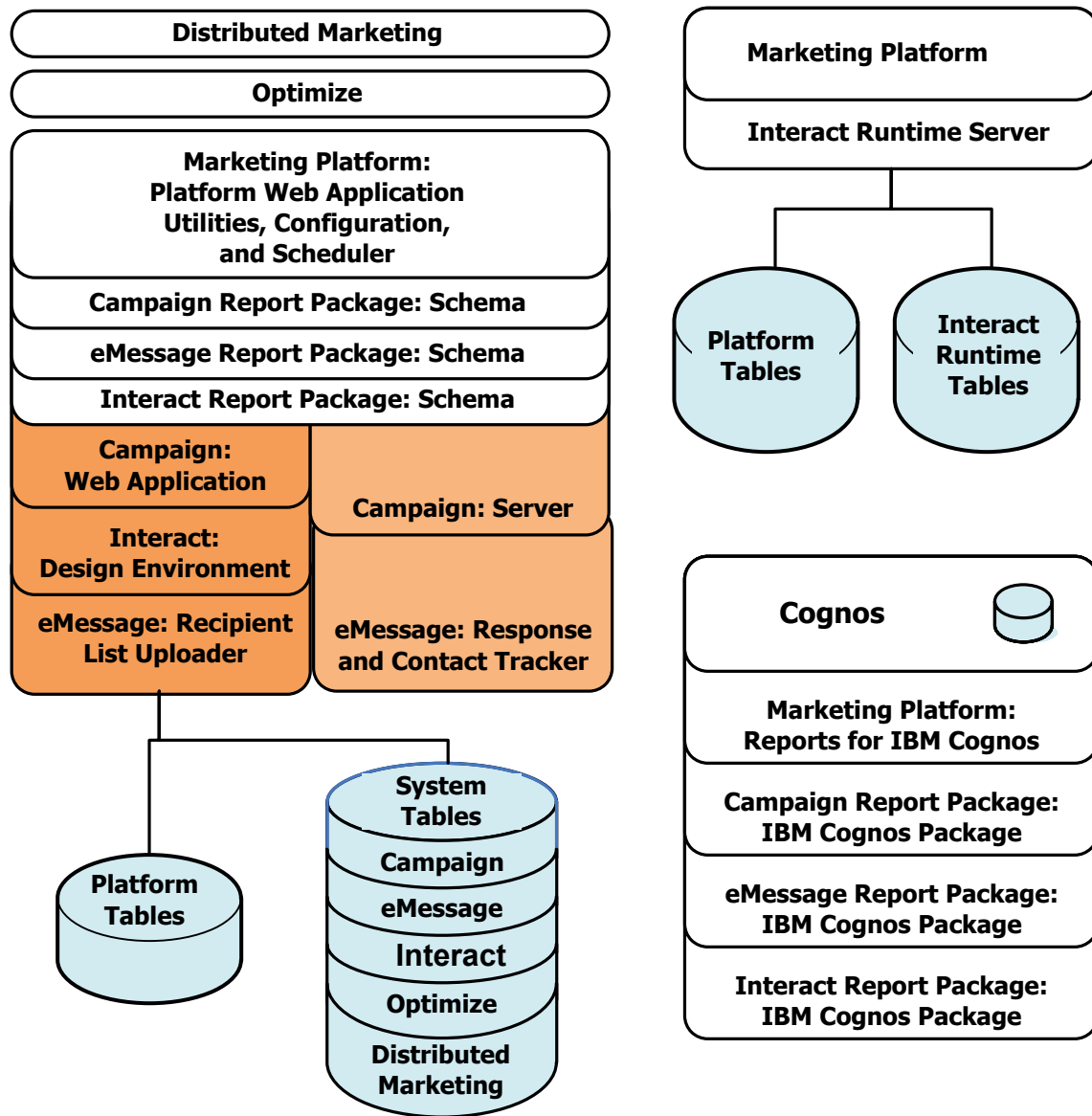


Figure 1. IBM EMM components

## Prerequisites

The following are prerequisites for installing IBM EMM products.

### System requirements

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

### JVM requirement

IBM EMM applications within a suite must be deployed on a dedicated Java™ virtual machine (JVM). IBM EMM products customize the JVM used by the web application server. If you encounter JVM-related errors, you may need to create an

Oracle WebLogic or WebSphere domain that is dedicated to the IBM EMM products.

## **Network domain requirement**

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

## **Knowledge requirement**

To install IBM EMM products, you must possess or work with people who possess a thorough knowledge of the environment in which the products are installed. This knowledge includes the operating systems, databases, and web application servers.

## **Required permissions**

Verify that your network permissions allow you to perform the procedures in this guide, that you have logins with appropriate permissions, and that the product installation files that you download have appropriate permissions, as follows.

- You must have the administrative login name and password for your web application server.
- You must have administration access for all necessary databases.
- You must have write permission for all files that you must edit.
- You must have write permission for all directories where you must save a file, such as the installation directory and backup directory if you are upgrading.
- The operating system account that you use to run the web application server and IBM EMM components must have read and write access to the relevant directory and subdirectories.
- You must have appropriate read/write/execute permissions to run the installer.

On UNIX, the user account that performs the IBM product installation must be a member of the same group as the user account that installed the web application server on which it will be deployed. This is because the web application server needs access to the product's file system.

- On UNIX, all of the installer files for IBM products must have full execute permissions (rwxr-xr-x).

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## **If you are upgrading**

If you are upgrading, you should read Chapter 6, “Upgrading the IBM Marketing Platform,” on page 27.



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## Chapter 2. Preparing the IBM Marketing Platform Data Source

This section provides the information you need to set up the database and JDBC connection for the Marketing Platform system tables. You will enter the details about this database when you run the IBM installer later in the installation process, so you should print and fill in the “Marketing Platform database information checklist” on page 8.

---

### Step: Create the Marketing Platform system table database or schema

1. Work with a database administrator to create the Marketing Platform system table database or schema.

Follow these vendor-specific guidelines.

- If your Marketing Platform system tables are in Oracle, you must enable auto commit for the environment open. See the Oracle documentation for instructions.
- If your Marketing Platform system tables are in DB2®, set the database page size to at least 16k (32k if you need to support Unicode). See the DB2 documentation for instructions.
- If Marketing Platform system tables are in SQL Server, you must use either SQL Server authentication only, or both SQL Server and Windows authentication, because the 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.

If you plan to enable locales that use multi-byte characters (for example, Chinese, Korean, and Japanese), ensure that the database is created to support them.

2. Have the database administrator create an account that can be used to create and populate the Marketing Platform system tables. This is done later in the installation process, and can be performed manually or automatically by the IBM EMM installer

This account must have at least the following rights.

- CREATE TABLES
  - CREATE VIEWS (for reporting)
  - CREATE SEQUENCE (Oracle only)
  - CREATE INDICES
  - ALTER TABLE
  - INSERT
  - UPDATE
  - DELETE
3. Obtain the information about your database or schema and the database account and then print and complete the “Marketing Platform database information checklist” on page 8. You will need this information during later steps in the installation process.

---

## Step: Configure the web application server for your JDBC driver

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

1. Obtain the latest vendor-provided Type 4 JDBC driver supported by IBM EMM, as described the *Recommended Software Environments and Minimum System Requirements* document.
  - If the driver does not exist on the machine where the Marketing Platform will be deployed, obtain it and unpack it on the machine where you plan to deploy the Marketing Platform. Unpack the drivers in a path that does not include spaces.
  - If you obtain the driver from a machine where the data source client is installed, verify that the version is the latest supported by IBM .
2. Include the full path to the driver, including the file name, in the classpath of the web application server where you plan to deploy the Marketing Platform, as follows.
  - For all supported versions of WebLogic, set the classpath in the `setDomainEnv` script in the `WebLogic_domain_directory/bin` directory where environment variables are configured. Your driver entry must be the first entry in the CLASSPATH list of values, before any existing values, to ensure that the web application server uses the correct driver. For example:

### UNIX

```
CLASSPATH="/home/oracle/product/10.2.0/jdbc/lib/ojdbc14.jar:
${PRE_CLASSPATH}${CLASSPATHSEP}${WEBLOGIC_CLASSPATH}
${CLASSPATHSEP}${POST_CLASSPATH}${CLASSPATHSEP}${WLP_POST_CLASSPATH}"
export CLASSPATH
```

### Windows

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

- For all supported versions of WebSphere, you set the classpath in the next step, while you are setting up the JDBC providers for the Marketing Platform.
3. Make a note of this database driver classpath in the Marketing Platform database information checklist, as you will need to enter it when you run the installer.
  4. Restart the web application server so your changes take effect.  
During startup, monitor the console log to confirm that the classpath contains the path to the database driver.

---

## Step: Create the JDBC connection in the web application server

The Marketing Platform web application must be able to communicate with its system table database using a JDBC connection. You must create this JDBC connection in the web application server where you plan to deploy the Marketing Platform.

In WebSphere, set the classpath for your database driver during this process.

**Important:** You must use `UnicaPlatformDS` as the JNDI name. This is required, and is noted in the “Marketing Platform database information checklist” on page 8.

**Note:** When the Marketing Platform system tables are created in a different schema from the default schema of the database login user, you must specify that non-default schema name in the JDBC connection used to access the system tables.

## Information for creating JDBC connections

When you create a JDBC connection, you can use this section to help you determine some of the values you must enter.

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

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

### WebLogic

Use these values if your application server is WebLogic.

#### SQLServer

- 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 11g

- Driver: Other
- Default port: 1521
- Driver class: `oracle.jdbc.OracleDriver`
- Driver URL:  
`jdbc:oracle:thin:@<your_db_host>:<your_db_port>:<your_db_service_name>`  
Enter the driver URL using the format 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 these values if your application server is WebSphere.

### SQLServer

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

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

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

- serverName=<your\_SQL\_server\_name>
- portNumber =<SQL\_Server\_Port\_Number>
- databaseName=<your\_database\_name>
- enable2Phase = false

### Oracle 11 and 11g

- Driver: Oracle JDBC Driver
- Default port: 1521
- Driver class: oracle.jdbc.OracleDriver
- Driver URL:  
jdbc:oracle:thin:@<your\_db\_host>:<your\_db\_port>:<your\_db\_service\_name>  
Enter the driver URL using the format 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>

---

## Marketing Platform database information checklist

Data source type	
Data source name	
Data source host name	
Data source port	
Data source account user name	
Data source account password	
JNDI name	UnicaPlatformDS
JDBC driver class	
JDBC connection URL	
JDBC driver classpath on your system	





---

## Chapter 3. Installing the IBM Marketing Platform

Obtain the DVD, or download the software from IBM .

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

To install the Marketing Platform you need the following.

- The IBM master installer
- The Marketing Platform installer

### Setting permissions on UNIX-type systems

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

### Choosing the right installer file

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

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

**If you plan to install on Windows using either GUI or console mode —**

*Product\_N.N.N.N\_win.exe* is version N.N.N.N and is intended for installation on the Windows operating systems.

**If you plan to install on Solaris using X-windows mode —**

*Product\_N.N.N.N\_solaris.bin* is version N.N.N.N and is intended for installation on the Solaris operating system.

**If you plan to install on a UNIX type system using console mode —**

*Product\_N.N.N.N\_.sh* is version N.N.N.N and is intended for installation on all supported UNIX type operating systems.

---

## How the IBM EMM installers work

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

### Single directory requirement for installer files

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

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

To install IBM EMM products, you must place the master installer and the product installers in the same directory. When you run the master installer, it detects the product installation files in the directory. You can then select the products you want to install.

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

## Installing patches

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

## Check for a JAVA\_HOME environment variable

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

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

If you have a JAVA\_HOME environment variable, and it points to an incorrect JRE, you must unset the JAVA\_HOME variable before you run the IBM EMM installers. You can do this as follows:

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

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

You can reset the environment variable after installation is complete.

## Choosing product installation directories

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

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

If the directory you specify does not exist, the installer creates it, assuming that your login has the appropriate permissions.

The default top-level directory for IBM EMM installations is /IBM/EMM (UNIX) or C:\IBM\EMM (Windows). The product installers then install product files in individual subdirectories under the EMM directory.



## Installation types

The IBM EMM installer performs the following types of installation.

- **New installation:** When you run the installer and select a directory where an IBM EMM product has never been installed, the installer automatically performs a new installation.
- **Upgrade installation:** When you run the installer and select a directory where *an earlier* version of an IBM EMM product is installed, the installer automatically performs an upgrade installation. For products where installers automatically update the database, upgrade installation adds new tables but does not overwrite data in existing tables.

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

- **Reinstallation:** When you run the installer and select a directory where *the same* version of an IBM EMM product is installed, the installer overwrites your existing installation. To preserve any existing data, back up your installation directories and your system table databases before reinstalling.

Typically, reinstallation is not recommended.

## Installation modes

The IBM EMM installer can run in the following modes.

- Console (command line) mode

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

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

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

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

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

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

## Installing multiple times using unattended mode

If you must install IBM EMM products multiple times, you may want to run the IBM EMM installers in unattended mode, which requires no user input.

### About the response files

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

You can use either of the following options to create response files.

- You can use the sample response file as a template for directly creating your response files. The sample files are included with your product installers in a compressed archive named ResponseFiles. The sample response files are named as follows.
  - IBM EMM master installer - `installer.properties`
  - Product installer - `installer_` followed by initials for the product name and numbers for the version. For example, the Campaign installer has a response file named `installer_ucN.N.N.N.properties`.
  - Product reports packs installer - `installer_` including initials for the report pack and the product name, plus numbers for the version. For example, the Campaign reports pack installer has a response file named `installer_urpcN.N.N.N.properties`.

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

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

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

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

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

## Where the installer looks for response files

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

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

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

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

## Effect of unattended mode when you uninstall

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

## Unattended mode and upgrades

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

## Automatic vs. manual system table creation

The Marketing Platform installer lets you choose whether or not to allow the installer to create the system tables in the database.

If you choose to allow the installer to create the system tables, you must provide information that enables the installer to connect to the Marketing Platform database you created in an earlier step. For the Marketing Platform, this is the same information that you provide in the IBM EMM master installer for product registration, as described in “Step: Obtain required information” on page 17.

If you choose to create the system tables manually, you must use your database client to run the SQL scripts provided with your Marketing Platform installation. Details for manual table creation are provided in “Step: Create and populate the Marketing Platform system tables manually, if necessary” on page 19.

## IBM Site ID

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

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

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

## IBM EMM installer exit codes

When you run the IBM EMM suite installer in Windows or Linux, it produces standard exit codes that either denote successful installation or errors in installation.

This section describes standard exit codes produced by the IBM EMM installer.

The codes are listed with the Windows code first, followed by the equivalent code in Linux, in parentheses.

If you see a value other than 0 or 1, it means the installation failed for one of the reasons cited below.

Code	Description
0 (0)	Success: The installation completed successfully without any warnings or errors.

Code	Description
1 (1)	The installation completed successfully, but one or more of the actions from the installation sequence caused a warning or a non-fatal error.
-1 (255)	Canceled by the user.
1000 (232)	The installation includes an invalid command-line option.
1001 (233)	One or more of the actions from the installation sequence caused an unrecoverable error.
2000 (208)	Unhandled error
2001 (209)	The installation failed the authorization check, may indicate an expired version.
2002 (210)	The installation failed a rules check. A rule placed on the installer itself failed.
2003 (211)	An unresolved dependency in silent mode caused the installer to exit.
2004 (212)	The installation failed because not enough disk space was detected during the execution of the Install action.
2005 (213)	The installation failed while trying to install on a Windows 64-bit system, but installation did not include support for Windows 64-bit systems.
2006 (214)	The installation failed because it was launched in a UI mode that is not supported by this installer.
3000 (184)	Unhandled error specific to a launcher.
3001 (185)	The installation failed due to an error specific to the lax.main.class property.
3002 (186)	The installation failed due to an error specific to the lax.main.method property.
3003 (187)	The installation was unable to access the method specified in the lax.main.method property.
3004 (188)	The installation failed due to an exception error caused by the lax.main.method property.
3005 (189)	The installation failed because no value was assigned to the lax.application.name property.
3006 (190)	The installation was unable to access the value assigned to the lax.nl.java.launcher.main.class property.
3007 (191)	The installation failed due to an error specific to the lax.nl.java.launcher.main.class property.
3008 (192)	The installation failed due to an error specific to the lax.nl.java.launcher.main.method property.
3009 (193)	The installation was unable to access the method specified in the lax.nl.launcher.java.main.method property.
4000 (160)	A Java executable could not be found at the directory specified by the java.home system property.
4001 (161)	An incorrect path to the installer jar caused the relaucher to launch incorrectly.
5000 (136)	Modification of existing instance failed because the instance has not been uninstalled properly or because the Registry has been corrupted.

---

## Where to install Marketing Platform components

The Marketing Platform application contains the IBM common navigation, reporting, user administration, security, scheduling, and configuration management features. Follow these guidelines.

- For each IBM EMM environment, you must install and deploy the Marketing Platform once.
- If you want to use the Marketing Platform utilities on additional machines, you must install both the utilities and the web application. This is needed because the utilities use the jar files in the web application. However, when you install the Marketing Platform for this purpose, you do not have to deploy the Marketing Platform again, nor do you have to create additional Marketing Platform system tables.

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

Component	Description
Marketing Platform utilities	Command line tools that allow you to work with the Marketing Platform system table database from the command line to import and export configurations, create partitions and data filters, and restore the platform_admin user. Install this on every machine where you want to be able to use Marketing Platform utilities.
Marketing Platform web application	The web application that supplies the common user interface, security, and configuration management for IBM EMM. Install this on the machine where you plan to deploy the Marketing Platform. Also, if you are configuring additional machines where you want to be able to use the Marketing Platform utilities, you must also install the web application because the utilities use the JAR files included in the web application. You should not deploy on these additional machines.
Reports for IBM Cognos® BI	Reports integration components for IBM Cognos. Install this component only on the Cognos system.

---

## Step: Obtain required information

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

### Obtain connection information for the Marketing Platform database

The installation wizards for all products must be able to communicate with the Marketing Platform system table database, to register their menu items, security information, and configuration properties. Each time you run the installer in a new location, you must enter the following database connection information for the Marketing Platform system table database.

- Database type.
- Database host name.
- Database port.
- Database name or schema ID.
- User name and password for the database account.

You obtained this information when you created the database or schema and filled out the Marketing Platform database information checklist.

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

## **Obtain information about your deployment on the web application server**

Obtain the following information about your planned Marketing Platform deployment.

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

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

## **Obtain information required to enable Marketing Platform utilities**

If you plan to use the Marketing Platform utilities, obtain the following JDBC connection information before you start to install the Marketing Platform.

- Path to the JRE. The default value is the path to the 1.6 version of the JRE that the installer places under your IBM installation directory.  
You can accept this default or specify a different path. If you specify a different path, you must point to the 1.6 version of the Sun JRE.
- JDBC driver class. The installer automatically provides this, based on the database type you specify in the installer.
- JDBC connection URL. The installer provides the basic syntax, but you must provide the host name, database name, and port.
- JDBC driver classpath on your system.

You obtained the last three pieces of information listed above when you created the database or schema and filled out the Marketing Platform database information checklist.

---

## **Step: Run the IBM installer**

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

- You have obtained the software products you plan to install, and you have put all of the installers in the same directory.
- You have available the information you gathered as described in “Step: Obtain required information” on page 17.

If your company policy does not allow the installer to create and populate the Marketing Platform system tables during installation, see “Step: Create and populate the Marketing Platform system tables manually, if necessary.”

**Note:** If you plan to deploy the Marketing Platform on WebLogic 9.2, do not include the Marketing Platform in an EAR file. See the WebLogic guidelines “Guidelines for deploying the Marketing Platform on WebLogic” on page 21 for details.

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

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

- **GUI or X-windows mode**

Run the IBM\_EMM\_Installer file. On UNIX-type systems, use the .bin file.

- **Console mode on Windows**

Open a command prompt, and from the directory where you placed the IBM software, run the IBM\_EMM\_Installer executable file with -i console. For example,

```
IBM_EMM_Installer_N.N.N.N_OS -i console
```

- **Console mode on UNIX-type systems**

Run the IBM\_EMM\_installer.sh file with no switch.

- **Unattended mode**

Open a command prompt, and from the directory where you placed the IBM software, run the IBM\_EMM\_Installer executable file with -i silent. On UNIX-type systems, use the .bin file.

For example, to specify a response file located in the same directory as the installer:

```
IBM_EMM_Installer_N.N.N.N_OS -i silent
```

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

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

For more information about unattended mode, see “Installing multiple times using unattended mode” on page 13.

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

---

## Step: Create and populate the Marketing Platform system tables manually, if necessary

The IBM installer can create the Marketing Platform system tables during installation, but if your company policy does not permit this, you must create and populate the tables manually.

1. Run the IBM installer as described in “Step: Run the IBM installer” on page 18, but with the following differences in your choices when it launches the Marketing Platform installer.
  - Select **Manual database setup**.
  - Deselect the **Run Platform configuration** checkbox.

2. After the installer finishes, create the system tables manually by running the following SQL scripts appropriate for your database type against your Marketing Platform system table database, as described in “Creating system tables” on page 67.

Run the scripts in this order.

- ManagerSchema\_*DBType*.sql

If you plan to support multi-byte characters (for example, Chinese, Japanese, or Korean) and your database is DB2, use the ManagerSchema\_DB2\_unicode.sql script.

- ManagerSchema\_\_*DBType*\_CeateFKConstraints.sql
- active\_portlets.sql
- quartz\_\_*DBType*.sql

3. Run the IBM installer again, making the following selections when it launches the Marketing Platform installer.

- Select **Manual database setup**.
- Select the **Run Platform configuration** checkbox.

This adds default data to the system tables.



---

## Chapter 4. Deploying the IBM Marketing Platform

When you deploy the Marketing Platform in your web application server, you must follow the guidelines described in this section.

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

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

---

### Guidelines for deploying the Marketing Platform on WebLogic

Follow the guidelines in this section when you deploy the Marketing Platform on WebLogic.

#### All versions of WebLogic

Follow the guidelines in this section when you deploy the Marketing Platform products on any supported version of WebLogic.

1. IBM EMM products customize the JVM used by WebLogic. You may need to create a WebLogic instance dedicated to IBM EMM products if you encounter JVM-related errors.
2. 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 BEA WebLogic documentation.
3. Deploy the Marketing Platform as a web application.
4. **Only if your instance of WebLogic is configured to use a JVM version 1.6 or newer**, do the following to work around an issue with the time zone database.
  - Stop WebLogic.
  - Download the Timezone Updater tool from the Oracle web site:  
<http://www.oracle.com/technetwork/java/javase/tzupdater-readme-136440.html>
  - Follow the steps provided by the Timezone Updater tool to update the time zone data in your JVM.
5. If you are configuring WebLogic to use the IIS plug-in, review the BEA WebLogic documentation.

#### Additional guidelines for WebLogic 11gR1 G only

Follow the guidelines in this section when you deploy the Marketing Platform on WebLogic 11gR1.

1. **Only if your installation must support non-ASCII characters**, for example for Portuguese or for locales that require multi-byte characters, edit the `setDomainEnv` script, located in the `bin` directory under your WebLogic domain directory, as follows.
  - Add the following to `JAVA_OPTIONS`.
 

```
-Dfile.encoding=UTF-8
```
2. In the WebLogic console, click the **Domain** link on the home page, and check the **Archived Real Path Enabled** box on the Web Applications tab.
3. Restart WebLogic.
4. Deploy and start the EAR file or the WAR file (`unica.war`).

---

## Guidelines for deploying the Marketing Platform on all versions of WebSphere

Follow the guidelines in this section when deploying the Marketing Platform on IBM WebSphere.

1. Be sure that the version of WebSphere meets the requirements described in the *IBM Enterprise Products Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
2. Set a custom property in the server as follows.
  - Name: `com.ibm.ws.webcontainer.invokefilterscompatibility`
  - Value: `true`

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

3. Deploy the IBM EAR file or `unica.war` file as an enterprise application. Follow the guidelines below. Unless otherwise noted below, you can accept the default settings.
 

Ensure that the JDK source level of the JSP compiler is set to Java 16 and that JSP pages are precompiled, as follows.

  - In the form where you browse to and select the WAR file, select **Show me all installation options and parameters** so the **Select Installation Options** wizard runs.
  - In step 1 of the **Select Installation Options** wizard, select **Precompile JavaServer Pages files**.
  - In step 3 of the **Select Installation Options** wizard, do the following.
    - In step 3 of the **Select Installation Options** wizard, ensure that the **JDK Source Level** is set to 16. If 16 is not available, select 15.

If you deployed an EAR, set the JDK Source Level for each WAR file.

The context root must be the `it /unica`, all lower case.

4. In the server's **Web Container Settings > Web Container > Session Management** section, enable cookies.
5. Specify a different session cookie name for each deployed application. Use the procedure that is appropriate for your deployment, as follows.
  - Select the **Override session management** checkbox under **Session Management**.
  - **If you deployed separate WAR files** for your IBM EMM products, in the WebSphere console, in the server's **Applications > Enterprise Applications > [deployed\_application] > Session Management > Enable Cookies > Cookie Name** section, specify a session cookie name that is unique.

- Select the **Override session management** checkbox under **Session Management**.
  - If you deployed EAR files for your IBM EMM products, in the WebSphere console, in the server's **Applications > Enterprise Applications > [deployed\_application] > Module Management > [deployed\_module] > Session Management > Enable Cookies > Cookie Name** section, specify a session cookie name that is unique.
6. **Only if your installation must support non-ASCII characters**, for example for Portuguese or for locales that require multi-byte characters, add the following to **Generic JVM Arguments** at the server level.
 

```
-Dfile.encoding=UTF-8
-Dclient.encoding.override=UTF-8
```

 Navigation tip: select **Servers > Application Servers > Java and Process Management > Process Definition > Java Virtual Machine > Generic JVM Arguments**. See the WebSphere documentation for additional details.
  7. In the server's **Applications > Enterprise Applications** section, select the EAR file or WAR file that you deployed, then select **Class loading and update detection** and set the following General Properties.
    - If you are deploying a WAR file:
      - For **Class loader order**, select **Classes loaded with local class loader first (parent last)**.
      - For **WAR class loader policy**, select **Single class loader for application**.
    - If you are deploying an EAR file:
      - For **Class loader order**, select **Classes loaded with local class loader first (parent last)**.
      - For **WAR class loader policy**, select **Class loader for each WAR file in application**.
  8. Start your deployment.
  9. **Only if your instance of WebSphere is configured to use a JVM version 1.6 or newer**, do the following to work around an issue with the time zone database.
    - Stop WebSphere.
    - Download the IBM Time Zone Update Utility for Java (JTZU) from the IBM web site:
 

```
http://www.ibm.com/developerworks/java/jdk/dst/index.html
```
    - Follow the steps provided by the IBM (JTZU) to update the time zone data in your JVM.
  10. Restart WebSphere.

---

## Step: Verify your Marketing Platform installation

1. Access the IBM EMM URL using Internet Explorer.
 

If you entered a domain when you installed, the URL is the following, where *host* is the machine where the Marketing Platform is installed, *domain.com* is the domain in which the host machine resides, and *port* is the port number on which the web application server listens.

```
http://host.domain.com:port/unica
```
2. Log in using the default administrator login, which is `asm_admin` with password as the password.

You will be asked to change the password. You can enter the existing password, but for good security you should choose a new one.

The default home page is the dashboard, which you will configure later. A 'page not found' message may be displayed on the dashboard page until it has been configured.

3. Under the **Settings** menu, check the Users, User Groups, and User Permissions pages to verify that the pre-configured users, groups, roles, and permissions are present, as described in the *Marketing Platform Administrator's Guide*.
4. Add a new user and group and verify that data is entered into the Marketing Platform system table database.
5. Under the **Settings** menu, check the Configuration page to verify that the Marketing Platform configuration properties exist.

There are additional configuration tasks, such as configuring the dashboard, setting up user access to IBM applications, and integrating with an LDAP or web access control system (optional). See the *IBM Marketing Platform Administrator's Guide* for instructions.

---

## Chapter 5. Configuring the IBM Marketing Platform After Deployment

For a basic installation of the Marketing Platform, you must perform additional configuration only under the following conditions.

- If you are using the IBM EMM reporting feature, see the *IBM EMM Reports Installation and Configuration Guide*.
- If you have a particular password policy in mind, see “To change default password settings” to determine whether you must change the default password settings.

The Marketing Platform has additional properties on the Configuration page that perform important functions that you can optionally adjust. See the context help for the properties, or the *IBM Marketing Platform Administrator's Guide* to learn more about what they do and how to set them.

---

### To change default password settings

You set password policies on the IBM EMM Configuration page in the IBM EMM > General > Password settings category.

These password options apply only to passwords for internal users (created within IBM EMM), not to users imported through synchronization with an external system (such as Windows Active Directory, a supported LDAP directory server, or web access control server). The exception is the Maximum failed login attempts allowed property, which affects both internal and external users. Also note that this property does not override any similar restriction set in an external system.

The default settings are as follows.

- Maximum failed login attempts allowed - 3
- Password history count - 0
- Validity (in days) - 30
- Blank passwords allowed - True
- Allow identical user name and password - True
- Minimum number of numeric characters - 0
- Minimum number of letter characters - 0
- Minimum character length - 4

See the online help for descriptions of these properties.



---

## Chapter 6. Upgrading the IBM Marketing Platform

Before you upgrade the Marketing Platform, be sure you have read and understood “Upgrade prerequisites for all IBM EMM products” and “Marketing Platform upgrade scenarios” on page 29.

---

### Upgrade prerequisites for all IBM EMM products

To upgrade any IBM EMM product, you must meet all of the prerequisites listed under “Prerequisites” on page 3 in the “Preparing to Install” chapter.

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

#### Remove response files generated by previous installations

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

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

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

The response files are named `installer_<product><version>.properties`, except for the file for the IBM installer itself, which is named `installer.properties`. The installer creates these files in the directory specified by the user during installation. The default location is the user's home directory.

#### User account requirement (UNIX only)

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

#### 32-bit to 64-bit version upgrades

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

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

#### Knowledge requirements

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

- The basic function of the IBM installer, as described in “How the IBM EMM installers work” on page 11
- General IBM EMM product functionality and components, including the structure of the file system

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

## Oracle or DB2 only: auto commit requirement

If your Marketing Platform system tables are in Oracle or DB2, you must enable auto commit for the environment open. See the Oracle or DB2 documentation for instructions.

## Check names of user-defined groups and roles

If any of the user-created groups or roles have the same name as any system-defined roles, change these group or role names before upgrade. If any user-created groups or roles have the same name as a system-defined role, problems can occur when you upgrade.

For example, if a user-created group or role is named "Admin," you should change the name, as this is the name of a system-defined role used in Campaign.

---

## Upgrading Schedules with time zone support

In version 8.5.0, the Marketing Platform Scheduler allows you to select any of a large number of world wide time zones for your tasks. If you had scheduled tasks in your pre-8.5.0 version of the Marketing Platform, they will be set to the default time zone, which is the time zone of the server on which the Marketing Platform is installed.

To take advantage of the time zone support in the Scheduler, you should edit your scheduled tasks and select the new time zone as needed. See the *IBM Marketing Platform Administrator's Guide* for information about using the Scheduler.

---

## Upgrading IBM Digital Analytics dashboard portlets

If you have any dashboards that contain custom IBM Digital Analytics portlets, you must recreate those portlets after your upgrade is complete.

---

## If you have re-branded the IBM frameset

If you have re-branded the IBM frameset as described in the *IBM Marketing Platform Administrator's Guide*, you must back up the files you modified before you proceed with the upgrade, and restore them after you have completed the upgrade installation but before you deploy your new version.

Typically, these files are the `corporatetheme.css` file and branding images. This file and the images are located under the `css\theme` directory within the `unica.war` file.

Therefore, you should do the following.

1. Make a backup copy of the `unica.war` file before you start the upgrade procedure.
2. Extract the `unica.war` file and set aside copies of your `corporatetheme.css` file and branding images.
3. Proceed with the upgrade as described in this chapter, but do not deploy.



4. Extract the new unica.war file and overwrite the existing images and corporatetheme.css file with your backed-up versions.
5. Re-war the new unica.war file, and deploy.

See the *IBM Marketing Platform Administrator's Guide* for additional details on re-branding.

## Marketing Platform upgrade scenarios

Follow these guidelines for upgrading the Marketing Platform.

Marketing Platform source version	Upgrade path
7.x	<p>A direct upgrade from these versions is not supported. Follow these steps.</p> <ul style="list-style-type: none"> <li>First, upgrade from any 7.x version to version 8.6.0. To perform this upgrade to version 8.6.0, obtain the software and follow the instructions in the installation guide for that version.</li> <li>Then, perform the upgrade as described in one of the following topics. <ul style="list-style-type: none"> <li>“To upgrade from version 8.x with automatic migration” on page 30</li> <li>“To upgrade from version 8.6.x with manual migration” on page 46</li> </ul> </li> </ul>
8.0.x or 8.1.x, <b>integrated with an LDAP server</b>	<ol style="list-style-type: none"> <li>If you have mapped LDAP groups in the LDAP references for AM user creation property that are not mapped in the LDAP reference to AM group map property, you must do the following in your current version of the Marketing Platform before proceeding with the upgrade. <ul style="list-style-type: none"> <li>Identify any groups in the <b>LDAP references for AM user creation</b> property that are not mapped in the <b>LDAP reference to AM group map</b> property.</li> <li>Map the LDAP groups you have identified to an appropriate Marketing Platform group. After you perform an LDAP synchronization, you can map these users to additional Marketing Platform groups to control their application access as needed. For instructions, see the <i>IBM Marketing Platform Administrator's Guide</i>.</li> </ul> <p>Performing the previous steps ensures that all desired users are created in the Marketing Platform.</p> </li> <li>Then, perform the upgrade as described in one of the following topics. <ul style="list-style-type: none"> <li>“To upgrade from version 8.x with automatic migration” on page 30</li> <li>“To upgrade from version 8.0.x, 8.1.x, or 8.2.x versions before 8.2.0.7 with manual migration” on page 31</li> </ul> </li> </ol>
<ul style="list-style-type: none"> <li>8.0.x (not integrated with an LDAP server)</li> <li>8.1.x (not integrated with an LDAP server)</li> <li>8.2.x before version 8.2.0.7</li> </ul>	<p>Upgrade your installation of the Marketing Platform as described in one of the following topics.</p> <ul style="list-style-type: none"> <li>“To upgrade from version 8.x with automatic migration” on page 30</li> <li>“To upgrade from version 8.0.x, 8.1.x, or 8.2.x versions before 8.2.0.7 with manual migration” on page 31</li> </ul>
8.2.0.7 and later 8.2.x versions	<p>Upgrade your installation of the Marketing Platform as described in one of the following topics.</p> <ul style="list-style-type: none"> <li>“To upgrade from version 8.x with automatic migration” on page 30</li> <li>“To upgrade from version 8.2.0.7 and later 8.2.x versions with manual migration” on page 36</li> </ul>
8.5.x	<p>Upgrade your installation of the Marketing Platform as described in one of the following topics.</p> <ul style="list-style-type: none"> <li>“To upgrade from version 8.x with automatic migration” on page 30</li> <li>“To upgrade from version 8.5.x with manual migration” on page 41</li> </ul>

Marketing Platform source version	Upgrade path
8.6.x	<p>Upgrade your installation of the Marketing Platform as described in one of the following topics.</p> <ul style="list-style-type: none"> <li>• “To upgrade from version 8.x with automatic migration”</li> <li>• “To upgrade from version 8.6.x with manual migration” on page 46&gt;</li> </ul>

## To upgrade from version 8.x with automatic migration

Upgrading from version 8.x is an in-place upgrade. You install to the directory where your current Marketing Platform is installed.

Ensure that you have the following in one directory.

- The IBM EMM master installer
- The Marketing Platform installer

A best practice is to do the following.

- Place the installers in the same directory where you originally placed the installers for the earlier versions of your products.
- Remove any earlier versions of the IBM EMM product installers from the directory, to avoid having the master installer attempt to install the earlier versions.

1. Make a backup copy of your Marketing Platform system table database.

**Important:** Do not skip this step. If upgrade fails, you will not be able to roll back your database and your data will be corrupted.

2. Undeploy your Marketing Platform deployment.
3. Run the IBM EMM master installer.

The IBM EMM master installer starts. See “Step: Run the IBM installer” on page 18 for details on running the installer.

- When the IBM EMM master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory which is under this root directory.
- When the IBM EMM master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

The IBM EMM master installer will pause and launch the Marketing Platform installer.

4. Follow these guidelines in the Marketing Platform installer.
  - When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named Platform.
  - Select **Automatic database setup**.
  - Follow all the remaining steps in the installation wizard, entering all requested information.
5. Deploy your installation following the guidelines in Chapter 4, “Deploying the IBM Marketing Platform,” on page 21.
6. Pay close attention to the installation summary windows. If errors are reported, check the installer log files and contact IBM EMM technical support if necessary.

---

## To upgrade from version 8.0.x, 8.1.x, or 8.2.x versions before 8.2.0.7 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration required for an upgrade automatically, but if your organization's policy does not allow this, you must perform this procedure to upgrade manually.

This procedure applies only to upgrades from versions 8.0.x, 8.1.x, and 8.2.x versions before 8.2.0.7 of the Marketing Platform. See “Marketing Platform upgrade scenarios” on page 29 for information on upgrading from other versions.

Ensure that you have the following in one directory.

- The IBM master installer
- The Marketing Platform installer

Also, ensure that your installation of Marketing Platform 8.x is fully functional and that you can run the command line tools. This procedure requires the use of three Marketing Platform utilities located in the `tools/bin` directory under your Marketing Platform installation. Complete information on using these utilities, including example commands for common tasks, is available as follows.

- “The populateDb utility” on page 62
  - “The configTool utility” on page 53
  - “The alertConfigTool utility” on page 57
1. Log in to IBM EMM, navigate to the **Settings > Configuration** page, and determine whether a property named **LDAP BaseDN periodic search enabled** is present under the **Platform | Security | Login method details | LDAP synchronization** category.  
You will use this information in a later step.
  2. Make a backup of your Marketing Platform system table database.

**Important:** Do not skip this step. If upgrade fails, you will not be able to roll back your database and your data will be corrupted.

3. Undeploy your current version.
4. Run the IBM master installer.

The IBM master installer starts. Follow these guidelines in the IBM master installer.

- When the IBM master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.
- When the IBM master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory which is under this root directory.

The IBM master installer will pause and launch the Marketing Platform installer.

5. Follow these guidelines in the Marketing Platform installer.
  - When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
  - Allow the installer to back up your previous installation.
  - Select **Manual database setup**.
  - Deselect the **Run Platform configuration** checkbox.

- Follow all the remaining steps in the Marketing Platform installer, entering all requested information.
6. After all of the installers finish, use the configTool utility to perform the following steps to ensure that the SQL scripts you run in the next step work correctly.
    - a. Export all of your configuration properties, from the root node Affinium.  
For example, the following command exports the properties to a file named config\_property\_export.xml, which is written to the install directory under your Marketing Platform installation. This is a Windows example.  

```
configTool.bat -x -p "Affinium" -f "C:\Unica\Platform\install\config_property_export.xml"
```
    - b. Delete all of the configuration properties, from the root node Affinium.  
For example, the following command deletes the properties. This is a Windows example.  

```
configTool.bat -d -o -p "Affinium"
```
    - c. Import the configuration properties you exported.  
For example, the following command imports the properties from a file named config\_property\_export.xml, located in the install directory under your Marketing Platform installation. This is a Windows example.  

```
configTool.bat -i -o -f "C:\Unica\Platform\install\config_property_export.xml"
```
  7. Use the appropriate table below to locate the SQL scripts, provided with your new Marketing Platform installation, against your Marketing Platform system table database. Run the SQL scripts in the order shown.

*Table 1. Use this table if you are upgrading from version 8.0.x*

Script Name	Location
ManagerSchema_DB_Type_81upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade80to81
ManagerSchema_DB_Type_8201upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade82to8201
ManagerSchema_DB_Type_85upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade82to85
insert_new_85_locales.sql	db\upgrade85to86
ManagerSchema_DB_Type_86upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade85to86
insert_new_8601_locales.sql	db\upgrade86to8601
active_portlets.sql	db
ManagerSchema_DB_Type_90upg.sql, where <i>DB_Type</i> is the database type of your system tables database.	db\upgrade86to90

*Table 2. Use this table if you are upgrading from version 8.1.x or 8.2.0*

Script Name	Location
ManagerSchema_DB_Type_8201upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade82to8201
ManagerSchema_DB_Type_85upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade82to85

Table 2. Use this table if you are upgrading from version 8.1.x or 8.2.0 (continued)

Script Name	Location
insert_new_85_locales.sql	db\upgrade82to85
ManagerSchema_DB_Type_86upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade85to86
insert_new_8601_locales.sql	db\upgrade86to8601
active_portlets.sql	db
ManagerSchema_DB_Type_90upg.sql, where <i>DB_Type</i> is the database type of your system tables database.	db\upgrade86to90

Table 3. Use this table if you are upgrading from version 8.2.0.1 and later patch versions before 8.2.0.7

Script Name	Location
ManagerSchema_DB_Type_85upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade82to85
insert_new_85_locales.sql	db\upgrade82to85
ManagerSchema_DB_Type_86upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade85to86
insert_new_8601_locales.sql	db\upgrade86to8601
active_portlets.sql	db
ManagerSchema_DB_Type_90upg.sql, where <i>DB_Type</i> is the database type of your system tables database.	db\upgrade86to90

8. Run the upgrade86to90 batch or shell script, located tools\bin\upgrade86to90 directory under your Marketing Platform installation.
9. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

This utility is located in the tools/bin directory under your Marketing Platform installation.

Example: populateDb -n Manager

10. Use the configTool utility to import configuration properties, as described in the following table. The example commands are for a Windows system.

The configTool utility is located in the tools/bin directory under your Marketing Platform installation. The example commands are for a Windows system.

The example commands are for a Windows system.

For complete details on the function of the configuration properties, see the online help for the **Settings > Configuration** page, or the *IBM Marketing Platform Administrator's Guide*.

Table 4. Use this table if you are upgrading from version 8.0.x, 8.1.x, or 8.2.x versions before 8.2.0.7

File name, location, and purpose	Example command
<p>Skip this import if the property named <b>LDAP BaseDN periodic search enabled</b> is present under the <b>Platform   Security   Login method details   LDAP synchronization</b> category. This is the property you checked for in step 1 of this procedure.</p> <p>If the property is not present, perform the following import.</p> <ul style="list-style-type: none"> <li>File: Ldap_Auto_Sync_BaseDN_Settings.xml</li> <li>Location: conf/upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that enables LDAP import search by DN</li> </ul>	<pre>configTool.bat -i -p "Affinium suite security ldapSynchronization ldapProperties" -f C:\Unica\Platform\conf\upgrade86to90\ Ldap_Auto_Sync_BaseDN_Settings.xml</pre>
<ul style="list-style-type: none"> <li>File: interaction_history_scheduler.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Interaction History</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ interaction_history_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>File: attribution_modeler_scheduler.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Attribution Modeler</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ attribution_modeler_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -i -p "Affinium" -f C:\Unica\Platform\conf\coremetrics_configuration.xml</li> <li>configTool.bat -i -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</li> </ul>
<ul style="list-style-type: none"> <li>File: cognos10_integration.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for reporting</li> </ul>	<pre>configTool.bat -i -p "Affinium Report integrations" -f C:\Unica\Platform\conf\upgrade85to86\cognos10_integration.xml</pre>
<ul style="list-style-type: none"> <li>File: No file - removing properties</li> <li>Purpose: Remove JMS configuration properties that are no longer used</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -d -o -p "Affinium suite jmsServer"</li> <li>configTool.bat -d -o -p "Affinium suite jmsPort"</li> </ul>
<ul style="list-style-type: none"> <li>File: LDAP_Anonymous_bind.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: <b>Only if you are upgrading from version 8.2.0 or later</b>, import a new LDAP configuration property</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -d -o -p "Affinium suite jmsServer"</li> <li>configTool.bat -d -o -p "Affinium suite jmsPort"</li> </ul>

Table 4. Use this table if you are upgrading from version 8.0.x, 8.1.x, or 8.2.x versions before 8.2.0.7 (continued)

File name, location, and purpose	Example command
<ul style="list-style-type: none"> <li>File: quicklinks_category.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import properties for quicklinks dashboard portlets</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\quicklinks_category.xml</pre>
<ul style="list-style-type: none"> <li>File: communication_email.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties to enable email notifications</li> </ul>	<pre>configTool.bat -i -o -p "Affinium Manager" -f C:\Unica\Platform\conf\upgrade86to90\communication_email.xml</pre>
<ul style="list-style-type: none"> <li>File: notification.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties for the notification feature</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\notification.xml</pre>
<ul style="list-style-type: none"> <li>File: manager_alerts_registration.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties that create the alerts menu items</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite uiNavigation alerts" -f C:\Unica\Platform\conf\manager_alerts_registration.xml</pre>
<ul style="list-style-type: none"> <li>File: disablePageTagging.xml</li> <li>Location: conf\upgrade82to85 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that determines whether IBM can gather basic statistics that track overall product usage trends.</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade82to85\disablePageTagging.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<pre>configTool.bat -i -o -p "Affinium" -f C:\Unica\Platform\ conf\coremetrics_configuration.xml configTool.bat -i -o -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<pre>configTool.bat -i -o -p "Affinium" -f C:\Unica\Platform\ conf\coremetrics_configuration.xml configTool.bat -i -o -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</pre>

11. Use the alertConfigTool utility to register the Marketing Platform alerts and notifications, as follows.

The alertConfigTool utility is located in the tools\bin directory under your Marketing Platform installation.



Run this utility from the tools\bin directory. You reference the Platform\_alerts\_configuration.xml file, located in the conf directory under your Marketing Platform installation.

Example command (Windows): alertConfigTool.bat -i -f C:\Platform\conf\Platform\_alerts\_configuration.xml

12. To upgrade the dashboard, run the upgrade85Dashboard script, located in the tools\bin directory under your Marketing Platform installation.
13. Update the **Help > About** page, as follows.
  - a. Use the configTool utility to export the Affinium | Manager | about category (this category is not visible on the Configuration page, as it is marked hidden).  
Example (Windows): configTool.bat -x -p "Affinium|Manager|about" -f C:\Unica\Platform\conf\about.xml
  - b. Edit the exported XML file you just created (about.xml in the example) to change the version number and display name, as follows.  
Find the releaseNumber property and change the value to the current version of the Marketing Platform. In the example, below, change 8.0.0 to your new version.  

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>8.0.0</value>
</property>
```
  - c. Use the configTool utility to import the revised file. You must use the -o option to overwrite the node. Remember that you must specify the parent node when you import.  
Example (Windows): configTool.bat -i -p "Affinium|Manager" -f "about.xml" -o
14. Deploy and verify your installation as described in the chapter Chapter 4, "Deploying the IBM Marketing Platform," on page 21.

After you upgrade your IBM EMM applications, see the *IBM EMM Reports Installation and Configuration Guide* for additional steps required for reporting upgrades.

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## To upgrade from version 8.2.0.7 and later 8.2.x versions with manual migration

This procedure applies only to upgrades from version 8.2.0.7 and later 8.2.x versions of the Marketing Platform.

See "Marketing Platform upgrade scenarios" on page 29 for information on upgrading from other versions.

Ensure that you have the following in one directory.

- The IBM master installer
- The Marketing Platform installer

Also, ensure that your installation of Marketing Platform 8.x is fully functional and that you can run the command line tools. This procedure requires the use of three Marketing Platform utilities located in the tools/bin directory under your



Marketing Platform installation. Complete information on using these utilities, including example commands for common tasks, is available as follows.

- “The populateDb utility” on page 62
  - “The configTool utility” on page 53
  - “The alertConfigTool utility” on page 57
1. Log in to IBM EMM, navigate to the **Settings > Configuration** page, and determine whether a property named **LDAP BaseDN periodic search enabled** is present under the **Platform | Security | Login method details | LDAP synchronization** category.  
You will use this information in a later step.
  2. Make a backup of your Marketing Platform system table database.

**Important:** Do not skip this step. If upgrade fails, you will not be able to roll back your database and your data will be corrupted.

3. Undeploy your current version.
4. Run the IBM master installer.

The IBM master installer starts. Follow these guidelines in the IBM master installer.

- When the IBM master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.
- When the IBM master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory which is under this root directory.

The IBM master installer will pause and launch the Marketing Platform installer.

5. Follow these guidelines in the Marketing Platform installer.
  - When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named Platform.
  - Allow the installer to back up your previous installation.
  - Select **Manual database setup**.
  - Deselect the **Run Platform configuration** checkbox.
  - Follow all the remaining steps in the Marketing Platform installer, entering all requested information.
6. After all of the installers finish, use the configTool utility to perform the following steps to ensure that the SQL scripts you run in a later step work correctly.
  - a. Export all of your configuration properties, from the root node Affinium.  
For example, the following command exports the properties to a file named config\_property\_export.xml, which is written to the install directory under your Marketing Platform installation. This is a Windows example.  

```
configTool.bat -x -p "Affinium" -f "C:\Unica\Platform\install\config_property_export.xml"
```
  - b. Delete all of the configuration properties, from the root node Affinium.  
For example, the following command deletes the properties. This is a Windows example.  

```
configTool.bat -d -o -p "Affinium"
```

- c. Import the configuration properties you exported.

For example, the following command imports the properties from a file named `config_property_export.xml`, located in the install directory under your Marketing Platform installation. This is a Windows example.

```
configTool.bat -i -o -f "C:\Unica\Platform\install\
config_property_export.xml
```

7. In the `db\upgrade82to85` directory under your Marketing Platform installation, edit a SQL script as follows.
  - a. The SQL script is `ManagerSchema_DB_Type_86upg.sql`, where `DB_Type` is the database type of your system tables database
  - b. For all database types, remove the following statement.  
`ALTER TABLE USCH_RUN ADD PAYLOAD NVARCHAR(4000);`
  - c. If your database is DB2, also remove the following statements.  
`ALTER TABLE qrtz_job_details ALTER COLUMN job_data SET DATA TYPE blob(4000);`  
`ALTER TABLE qrtz_triggers ALTER COLUMN job_data SET DATA TYPE blob(4000);`
8. Use the appropriate table below to locate the SQL scripts, provided with your new Marketing Platform installation, against your Marketing Platform system table database. Run the SQL scripts in the order shown.

*Table 5. Use this table if you are upgrading from version 8.2.0.7 or a later 8.2.x version*

Script Name	Location
<code>ManagerSchema_DB_Type_85upg.sql</code> , where <code>DB_Type</code> is the database type of your system tables database	<code>db\upgrade82to85</code>
<code>insert_new_85_locales.sql</code>	<code>db\upgrade82to85</code>
<code>ManagerSchema_DB_Type_86upg.sql</code> , where <code>DB_Type</code> is the database type of your system tables database	<code>db\upgrade85to86</code>
<code>insert_new_8601_locales.sql</code>	<code>db\upgrade86to8601</code>
<code>active_portlets.sql</code>	<code>db</code>
<code>ManagerSchema_DB_Type_90upg.sql</code> , where <code>DB_Type</code> is the database type of your system tables database.	<code>db\upgrade86to90</code>

9. Run the `upgrade86to90` batch or shell script, located `tools\bin\upgrade86to90` directory under your Marketing Platform installation.
10. Use the `populateDb` utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.  
 This utility is located in the `tools/bin` directory under your Marketing Platform installation.  
 Example: `populateDb -n Manager`
11. Use the `configTool` utility to import configuration properties, as described in the following table. The example commands are for a Windows system.  
 The `configTool` utility is located in the `tools/bin` directory under your Marketing Platform installation. The example commands are for a Windows system.  
 The example commands are for a Windows system.

For complete details on the function of the configuration properties, see the online help for the **Settings > Configuration** page, or the *IBM Marketing Platform Administrator's Guide*.

Table 6. Use this table if you are upgrading from version 8.2.0.7 or a later 8.2.x version

File name, location, and purpose	Example command
<p>Skip this import if the property named <b>LDAP BaseDN periodic search enabled</b> is present under the <b>Platform   Security   Login method details   LDAP synchronization</b> category. This is the property you checked for in step 1 of this procedure.</p> <p>If the property is not present, perform the following import.</p> <ul style="list-style-type: none"> <li>File: Ldap_Auto_Sync_BaseDN_Settings.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that enables LDAP import search by DN</li> </ul>	<pre>configTool.bat -i -p "Affinium suite security ldapSynchronization ldapProperties" -f C:\Unica\Platform\conf\upgrade86to90\ Ldap_Auto_Sync_BaseDN_Settings.xml</pre>
<ul style="list-style-type: none"> <li>File: interaction_history_scheduler.xml</li> <li>Location: conf\upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Interaction History</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ interaction_history_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>File: attribution_modeler_scheduler.xml</li> <li>Location: conf\upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Attribution Modeler</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ attribution_modeler_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<pre>configTool.bat -i -p "Affinium" -f C:\Unica\Platform\conf\ coremetrics_configuration.xml configTool.bat -i -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</pre>
<ul style="list-style-type: none"> <li>File: cognos10_integration.xml</li> <li>Location: conf\upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for reporting</li> </ul>	<pre>configTool.bat -i -p "Affinium Report integrations" -f C:\Unica\Platform\conf\upgrade85to86\cognos10_integration.xml</pre>
<ul style="list-style-type: none"> <li>File: No file - removing properties</li> <li>Purpose: Remove JMS configuration properties that are no longer used</li> </ul>	<pre>configTool.bat -d -o -p "Affinium suite jmsServer" configTool.bat -d -o -p "Affinium suite jmsPort"</pre>

Table 6. Use this table if you are upgrading from version 8.2.0.7 or a later 8.2.x version (continued)

File name, location, and purpose	Example command
<ul style="list-style-type: none"> <li>File: LDAP_Anonymous_bind.xml</li> <li>Location: conf\upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: <b>Only if you are upgrading from version 8.2.0 or later</b>, import a new LDAP configuration property</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -d -o -p "Affinium suite jmsServer"</li> <li>configTool.bat -d -o -p "Affinium suite jmsPort"</li> </ul>
<ul style="list-style-type: none"> <li>File: quicklinks_category.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import properties for quicklinks dashboard portlets</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\quicklinks_category.xml</pre>
<ul style="list-style-type: none"> <li>File: communication_email.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties to enable email notifications</li> </ul>	<pre>configTool.bat -i -o -p "Affinium Manager" -f C:\Unica\Platform\conf\upgrade86to90\communication_email.xml</pre>
<ul style="list-style-type: none"> <li>File: notification.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties for the notification feature</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\notification.xml</pre>
<ul style="list-style-type: none"> <li>File: manager_alerts_registration.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties that create the alerts menu items</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite uiNavigation alerts" -f C:\Unica\Platform\conf\manager_alerts_registration.xml</pre>
<ul style="list-style-type: none"> <li>File: disablePageTagging.xml</li> <li>Location: conf\upgrade82to85 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that determines whether IBM can gather basic statistics that track overall product usage trends.</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade82to85\disablePageTagging.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -i -o -p "Affinium" -f C:\Unica\Platform\conf\coremetrics_configuration.xml</li> <li>configTool.bat -i -o -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</li> </ul>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -i -o -p "Affinium" -f C:\Unica\Platform\conf\coremetrics_configuration.xml</li> <li>configTool.bat -i -o -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</li> </ul>

12. Use the alertConfigTool utility to register the Marketing Platform alerts and notifications, as follows.

The alertConfigTool utility is located in the tools\bin directory under your Marketing Platform installation.

Run this utility from the tools\bin directory. You reference the Platform\_alerts\_configuration.xml file, located in the conf directory under your Marketing Platform installation.

Example command (Windows): alertConfigTool.bat -i -f  
C:\Platform\conf\Platform\_alerts\_configuration.xml

13. To upgrade the dashboard, run the upgrade85Dashboard script, located in the tools\bin directory under your Marketing Platform installation.

14. Update the **Help > About** page, as follows.

- a. Use the configTool utility to export the Affinium | Manager | about category (this category is not visible on the Configuration page, as it is marked hidden).

Example (Windows): configTool.bat -x -p "Affinium|Manager|about" -f  
C:\Unica\Platform\conf\about.xml

- b. Edit the exported XML file you just created (about.xml in the example) to change the version number and display name, as follows.

Find the releaseNumber property and change the value to the current version of the Marketing Platform. In the example, below, change 8.0.0 to your new version.

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>8.0.0</value>
</property>
```

- c. Use the configTool utility to import the revised file. You must use the -o option to overwrite the node. Remember that you must specify the parent node when you import.

Example (Windows): configTool.bat -i -p "Affinium|Manager" -f  
"about.xml" -o

15. Deploy and verify your installation as described in the chapter Chapter 4, "Deploying the IBM Marketing Platform," on page 21.

After you upgrade your IBM EMM applications, see the *IBM EMM Reports Installation and Configuration Guide* for additional steps required for reporting upgrades.

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## To upgrade from version 8.5.x with manual migration

This procedure applies only to upgrades from version 8.5.x of the Marketing Platform. Automatic upgrade from these versions is not supported.

See "Marketing Platform upgrade scenarios" on page 29 for information on upgrading from other versions.

Ensure that you have the following in one directory.

- The IBM master installer
- The Marketing Platform installer

Also, ensure that your installation of Marketing Platform 8.x is fully functional and that you can run the command line tools. This procedure requires the use of three Marketing Platform utilities located in the `tools/bin` directory under your Marketing Platform installation. Complete information on using these utilities, including example commands for common tasks, is available as follows.

- “The populateDb utility” on page 62
  - “The configTool utility” on page 53
  - “The alertConfigTool utility” on page 57
1. Log in to IBM EMM, navigate to the **Settings > Configuration** page, and determine whether a property named **LDAP BaseDN periodic search enabled** is present under the **Platform | Security | Login method details | LDAP synchronization** category.

You will use this information in a later step.

2. Make a backup of your Marketing Platform system table database.

**Important:** Do not skip this step. If upgrade fails, you will not be able to roll back your database and your data will be corrupted.

3. Undeploy your current version.
4. Run the IBM master installer.

The IBM master installer starts. Follow these guidelines in the IBM master installer.

- When the IBM master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.
- When the IBM master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory which is under this root directory.

The IBM master installer will pause and launch the Marketing Platform installer.

5. Follow these guidelines in the Marketing Platform installer.
  - When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named Platform.
  - Allow the installer to back up your previous installation.
  - Select **Manual database setup**.
  - Deselect the **Run Platform configuration** checkbox.
  - Follow all the remaining steps in the Marketing Platform installer, entering all requested information.
6. After all of the installers finish, in the `db\upgrade85to86` directory under your Marketing Platform installation, edit a SQL script as follows.
  - a. The SQL script is `ManagerSchema_DB_Type_86upg.sql`, where `DB_Type` is the database type of your system tables database
  - b. For all database types, remove the following statement.
 

```
ALTER TABLE USCH_RUN ADD PAYLOAD NVARCHAR(4000);
```
  - c. If your database is DB2, also remove the following statements.
 

```
ALTER TABLE qrtz_job_details ALTER COLUMN job_data SET DATA TYPE blob(4000);
ALTER TABLE qrtz_triggers ALTER COLUMN job_data SET DATA TYPE blob(4000);
```

7. Use the appropriate table below to locate the SQL scripts, provided with your new Marketing Platform installation, against your Marketing Platform system table database. Run the SQL scripts in the order shown.

*Table 7. Use this table if you are upgrading from version 8.5.x*

Script Name	Location
ManagerSchema_DB_Type_86upg.sql, where <i>DB_Type</i> is the database type of your system tables database	db\upgrade85to86
active_portlets.sql	db
ManagerSchema_DB_Type_90upg.sql, where <i>DB_Type</i> is the database type of your system tables database.	db\upgrade86to90

8. Run the upgrade86to90 batch or shell script, located tools\bin\upgrade86to90 directory under your Marketing Platform installation.
9. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

This utility is located in the tools/bin directory under your Marketing Platform installation.

Example: populateDb -n Manager

10. Use the configTool utility to import configuration properties, as described in the following table. The example commands are for a Windows system.

The configTool utility is located in the tools/bin directory under your Marketing Platform installation. The example commands are for a Windows system.

The example commands are for a Windows system.

For complete details on the function of the configuration properties, see the online help for the **Settings > Configuration** page, or the *IBM Marketing Platform Administrator's Guide*.

*Table 8. Use this table if you are upgrading from any version 8.5.x*

File name, location, and purpose	Example command
<p>Skip this import if the property named <b>LDAP BaseDN periodic search enabled</b> is present under the <b>Platform   Security   Login method details   LDAP synchronization</b> category. This is the property you checked for in step 1 of this procedure.</p> <p>If the property is not present, perform the following import.</p> <ul style="list-style-type: none"> <li>• File: Ldap_Auto_Sync_BaseDN_Settings.xml</li> <li>• Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>• Purpose: Import a configuration property that enables LDAP import search by DN</li> </ul>	<pre>configTool.bat -i -p "Affinium suite security ldapSynchronization ldapProperties" -f C:\Unica\Platform\conf\upgrade86to90\ Ldap_Auto_Sync_BaseDN_Settings.xml</pre>



Table 8. Use this table if you are upgrading from any version 8.5.x (continued)

File name, location, and purpose	Example command
<ul style="list-style-type: none"> <li>File: interaction_history_scheduler.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Interaction History</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ interaction_history_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>File: attribution_modeler_scheduler.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the scheduler configuration properties required for Attribution Modeler</li> </ul>	<pre>configTool.bat -i -p "Affinium suite scheduler taskRegistrations" -f C:\Unica\Platform\conf\upgrade85to86\ attribution_modeler_scheduler.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -i -p "Affinium" -f C:\Unica\Platform\conf\coremetrics_configuration.xml</li> <li>configTool.bat -i -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</li> </ul>
<ul style="list-style-type: none"> <li>File: cognos10_integration.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for reporting</li> </ul>	<pre>configTool.bat -i -p "Affinium Report integrations" -f C:\Unica\Platform\conf\upgrade85to86\cognos10_integration.xml</pre>
<ul style="list-style-type: none"> <li>File: No file - removing properties</li> <li>Purpose: Remove JMS configuration properties that are no longer used</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -d -o -p "Affinium suite jmsServer"</li> <li>configTool.bat -d -o -p "Affinium suite jmsPort"</li> </ul>
<ul style="list-style-type: none"> <li>File: LDAP_Anonymous_bind.xml</li> <li>Location: conf/upgrade85to86 directory under your Marketing Platform installation</li> <li>Purpose: <b>Only if you are upgrading from version 8.2.0 or later</b>, import a new LDAP configuration property</li> </ul>	<ul style="list-style-type: none"> <li>configTool.bat -d -o -p "Affinium suite jmsServer"</li> <li>configTool.bat -d -o -p "Affinium suite jmsPort"</li> </ul>
<ul style="list-style-type: none"> <li>File: quicklinks_category.xml</li> <li>Location: conf/upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import properties for quicklinks dashboard portlets</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\quicklinks_category.xml</pre>
<ul style="list-style-type: none"> <li>File: communication_email.xml</li> <li>Location: conf/upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties to enable email notifications</li> </ul>	<pre>configTool.bat -i -o -p "Affinium Manager" -f C:\Unica\Platform\conf\upgrade86to90\communication_email.xml</pre>



Table 8. Use this table if you are upgrading from any version 8.5.x (continued)

File name, location, and purpose	Example command
<ul style="list-style-type: none"> <li>File: notification.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties for the notification feature</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\notification.xml</pre>
<ul style="list-style-type: none"> <li>File: manager_alerts_registration.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties that create the alerts menu items</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite uiNavigation alerts" -f C:\Unica\Platform\conf\manager_alerts_registration.xml</pre>
<ul style="list-style-type: none"> <li>File: disablePageTagging.xml</li> <li>Location: conf\upgrade82to85 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that determines whether IBM can gather basic statistics that track overall product usage trends.</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade82to85\disablePageTagging.xml</pre>
<ul style="list-style-type: none"> <li>Files: coremetrics_configuration.xml and coremetrics_navigation.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import the configuration properties required for single sign-on with IBM Digital Analytics</li> </ul>	<pre>configTool.bat -i -o -p "Affinium" -f C:\Unica\Platform\ conf\coremetrics_configuration.xml configTool.bat -i -o -p "Affinium suite uiNavigation mainMenu Analytics" -f C:\Unica\Platform\conf\coremetrics_navigation.xml</pre>

11. Use the alertConfigTool utility to register the Marketing Platform alerts and notifications, as follows.

The alertConfigTool utility is located in the tools\bin directory under your Marketing Platform installation.

Run this utility from the tools\bin directory. You reference the Platform\_alerts\_configuration.xml file, located in the conf directory under your Marketing Platform installation.

Example command (Windows): alertConfigTool.bat -i -f  
C:\Platform\conf\Platform\_alerts\_configuration.xml

12. To upgrade the dashboard, run the upgrade85Dashboard script, located in the tools\bin directory under your Marketing Platform installation.
13. Update the **Help > About** page, as follows.

- a. Use the configTool utility to export the Affinium | Manager | about category (this category is not visible on the Configuration page, as it is marked hidden).

Example (Windows): configTool.bat -x -p "Affinium|Manager|about" -f  
C:\Unica\Platform\conf\about.xml

- b. Edit the exported XML file you just created (about.xml in the example) to change the version number and display name, as follows.

Find the releaseNumber property and change the value to the current version of the Marketing Platform. In the example, below, change 8.0.0 to your new version.

```
<property name="releaseNumber" type="string">
```

```
<displayNameKey>about.releaseNumber</displayNameKey>
<value>8.0.0</value>
</property>
```

- c. Use the configTool utility to import the revised file. You must use the -o option to overwrite the node. Remember that you must specify the parent node when you import.

Example (Windows): configTool.bat -i -p "Affinium|Manager" -f "about.xml" -o

14. Deploy and verify your installation as described in the chapter Chapter 4, "Deploying the IBM Marketing Platform," on page 21.

After you upgrade your IBM EMM applications, see the *IBM EMM Reports Installation and Configuration Guide* for additional steps required for reporting upgrades.

---

## To upgrade from version 8.6.x with manual migration

This procedure applies only to upgrades from version 8.6.x of the Marketing Platform. Automatic upgrade from these versions is not supported.

See "Marketing Platform upgrade scenarios" on page 29 for information on upgrading from other versions.

Ensure that you have the following in one directory.

- The IBM master installer
- The Marketing Platform installer

Also, ensure that your installation of Marketing Platform is fully functional and that you can run the command line tools. This procedure requires the use of three Marketing Platform utilities located in the tools/bin directory under your Marketing Platform installation. Complete information on using these utilities, including example commands for common tasks, is available as follows.

- "The populateDb utility" on page 62
  - "The configTool utility" on page 53
  - "The alertConfigTool utility" on page 57
1. Log in to IBM EMM, navigate to the **Settings > Configuration** page, and determine whether a property named **LDAP BaseDN periodic search enabled** is present under the **Platform | Security | Login method details | LDAP synchronization** category.

You will use this information in a later step.

2. Make a backup of your Marketing Platform system table database.

**Important:** Do not skip this step. If upgrade fails, you will not be able to roll back your database and your data will be corrupted.

3. Undeploy your current version.
4. Run the IBM master installer.

The IBM master installer starts. Follow these guidelines in the IBM master installer.

- When the IBM master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

- When the IBM master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory which is under this root directory.

The IBM master installer will pause and launch the Marketing Platform installer.

5. Follow these guidelines in the Marketing Platform installer.
  - When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named Platform.
  - Allow the installer to back up your previous installation.
  - Select **Manual database setup**.
  - Deselect the **Run Platform configuration** checkbox.
  - Follow all the remaining steps in the Marketing Platform installer, entering all requested information.
6. After all of the installers finish, run the following SQL script, provided with your new Marketing Platform installation, against your Marketing Platform system table database.  
 ManagerSchema\_DB\_Type\_90upg.sql, where  
 DB\_Type is the database type of your system tables database.  
 The file is located in the db\upgrade86to90 directory under your Marketing Platform installation.
7. Run the upgrade86to90 batch or shell script, located tools\bin\upgrade86to90 directory under your Marketing Platform installation.
8. Use the configTool utility to import configuration properties, as shown in the following table.

The configTool utility is located in the tools/bin directory under your Marketing Platform installation. The example commands are for a Windows system.

The example commands are for a Windows system.

For complete details on the function of the configuration properties, see the online help for the **Settings > Configuration** page, or the *IBM Marketing Platform Administrator's Guide*.

Table 9. Use this table if you are upgrading from version 8.6.0.

File name, location, and purpose	Example command
<p>Skip this import if the property named <b>LDAP BaseDN periodic search enabled</b> is present under the <b>Platform   Security   Login method details   LDAP synchronization</b> category. This is the property you checked for in step 1 of this procedure.</p> <p>If the property is not present, perform the following import.</p> <ul style="list-style-type: none"> <li>• File: Ldap_Auto_Sync_BaseDN_Settings.xml</li> <li>• Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>• Purpose: Import a configuration property that enables LDAP import search by DN</li> </ul>	<pre>configTool.bat -i -p "Affinium suite security ldapSynchronization ldapProperties" -f C:\Unica\Platform\conf\Ldap_Auto_Sync_BaseDN_Settings.xml</pre>

Table 9. Use this table if you are upgrading from version 8.6.0. (continued)

File name, location, and purpose	Example command
<ul style="list-style-type: none"> <li>File: quicklinks_category.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import properties for quicklinks dashboard portlets</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\quicklinks_category.xml</pre>
<ul style="list-style-type: none"> <li>File: communication_email.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties to enable email notifications</li> </ul>	<pre>configTool.bat -i -o -p "Affinium Manager" -f C:\Unica\Platform\conf\upgrade86to90\communication_email.xml</pre>
<ul style="list-style-type: none"> <li>File: notification.xml</li> <li>Location: conf\upgrade86to90 directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties for the notification feature</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade86to90\notification.xml</pre>
<ul style="list-style-type: none"> <li>File: manager_alerts_registration.xml</li> <li>Location: conf directory under your Marketing Platform installation</li> <li>Purpose: Import configuration properties that create the alerts menu items</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite uiNavigation alerts" -f C:\Unica\Platform\conf\manager_alerts_registration.xml</pre>
<ul style="list-style-type: none"> <li>File: disablePageTagging.xml</li> <li>Location: conf\upgrade82to85 directory under your Marketing Platform installation</li> <li>Purpose: Import a configuration property that determines whether IBM can gather basic statistics that track overall product usage trends.</li> </ul>	<pre>configTool.bat -i -o -p "Affinium suite" -f C:\Unica\Platform\conf\upgrade82to85\disablePageTagging.xml</pre>

9. Use the alertConfigTool utility to register the Marketing Platform alerts and notifications, as follows.

The alertConfigTool utility is located in the tools\bin directory under your Marketing Platform installation.

Run this utility from the tools\bin directory. You reference the Platform\_alerts\_configuration.xml file, located in the conf directory under your Marketing Platform installation.

Example command (Windows): alertConfigTool.bat -i -f  
C:\Platform\conf\Platform\_alerts\_configuration.xml

10. Update the **Help > About** page, as follows.

- a. Use the configTool utility to export the Affinium | Manager | about category (this category is not visible on the Configuration page, as it is marked hidden).

Example (Windows): configTool -x -p "Affinium|Manager|about" -f  
C:\Unica\Platform\conf\about.xml

- b. Edit the exported XML file you just created (about.xml in the example) to change the version number and display name, as follows.

Find the releaseNumber property and change the value to the current version of the Marketing Platform. In the example, below, change 8.0.0 to your new version.

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>8.0.0</value>
</property>
```

- c. Use the configTool utility to import the revised file. You must use the -o option to overwrite the node. Remember that you must specify the parent node when you import.

Example (Windows): configTool -i -p "Affinium|Manager" -f  
"about.xml" -o

11. Deploy and verify your installation as described in the chapter Chapter 4, "Deploying the IBM Marketing Platform," on page 21.

After you upgrade your IBM EMM applications, see the *IBM EMM Reports Installation and Configuration Guide* for additional steps required for reporting upgrades.



---

## Appendix A. About Marketing Platform utilities

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

### Location of utilities

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

### List and descriptions of utilities

The Marketing Platform provides the following utilities.

- “The `configTool` utility” on page 53 - imports, exports, and deletes configuration settings, including product registrations
- “The `alertConfigTool` utility” on page 57 - registers alerts and configurations for IBM EMM products
- “The `datafilteringScriptTool` utility” on page 57 - creates data filters
- “The `encryptPasswords` utility” on page 58 - encrypts and stores passwords
- “The `partitionTool` utility” on page 60 - creates database entries for partitions
- “The `populateDb` utility” on page 62 - populates the Marketing Platform database
- “The `restoreAccess` utility” on page 62 - restores a user with the `platformAdminRole` role
- “The `scheduler_console_client` utility” on page 64 - lists or starts IBM EMM Scheduler jobs that are configured to listen for a trigger.

### Prerequisites for running Marketing Platform utilities

The following are prerequisites for running all Marketing Platform utilities.

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

### Troubleshooting connection issues

All of the Marketing Platform utilities except `encryptPasswords` interact with the Marketing Platform system tables. To connect to the system table database, these utilities use the following connection information, which is set by the installer using information provided when the Marketing Platform was installed. This information is stored in the `jdbc.properties` file, located in the `tools/bin` directory under your Marketing Platform installation.

- JDBC driver name
- JDBC connection URL (which includes the host, port, and database name)

- Data source login
- Data source password (encrypted)

In addition, these utilities rely on the `JAVA_HOME` environment variable, set either in the `setenv` script located in the `tools/bin` directory of your Marketing Platform installation, or on the command line. The Marketing Platform installer should have set this variable automatically in the `setenv` script, but it is a good practice to verify that the `JAVA_HOME` variable is set if you have a problem running a utility. The JDK must be the Sun version (not, for example, the JRockit JDK available with WebLogic).

## Special characters

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

## Standard options in Marketing Platform utilities

The following options are available in all Marketing Platform utilities.

`-l logLevel`

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

`-L`

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

`-h`

Display a brief usage message in the console.

`-m`

Display the manual page for this utility in the console.

`-v`

Display more execution details in the console.

---

## Running Marketing Platform utilities on additional machines

On the machine where the Marketing Platform is installed, you can run the Marketing Platform utilities without any additional configuration. However, you might want to run the utilities from another machine on the network. This procedure describes the steps required to do this.

### To set up Marketing Platform utilities on additional machines

1. Ensure that the machine on which you perform this procedure meets the following prerequisites.



- The correct JDBC driver must exist on the machine or be accessible from it.
  - The machine must have network access to the Marketing Platform system tables.
  - The Java runtime environment must be installed on the machine or be accessible from it.
2. Gather the following information about the Marketing Platform system tables.
    - The fully qualified path for the JDBC driver file or files on your system.
    - The fully qualified path to an installation of the Java runtime environment. The default value in the installer is the path to the supported version of the JRE that the installer places under your IBM installation directory. You can accept this default or specify a different path.
    - Database type
    - Database host
    - Database port
    - Database name/system ID
    - Database user name
    - Database password
  3. Run the IBM installer and install the Marketing Platform.

Enter the database connection information that you gathered for the Marketing Platform system tables. If you are not familiar with the IBM installer, see the Campaign or Marketing Operations installation guide.

You do not have to deploy the Marketing Platform web application.

---

## Reference: Marketing Platform utilities

This section describes the Marketing Platform utilities, with functional details, syntax, and examples.

### The configTool utility

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

#### When to use configTool

You might want to use configTool for the following reasons.

- To import partition and data source templates supplied with Campaign, which you can then modify and duplicate using the Configuration page.
- To register (import configuration properties for) IBM 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 using configTool to import the edited XML.

**Important:** This utility modifies the `usm_configuration` and `usm_configuration_values` tables in the Marketing Platform system table database, which contain the configuration properties and their values. For best results, either create backup copies of these tables, or export your existing configurations using

configTool and back up the resulting file so you have a way to restore your configuration if you make an error when using configTool to import.

## Valid product names

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

Product name	Name used in configTool
Marketing Platform	Manager
Campaign	Campaign
Distributed Marketing	Collaborate
eMessage	emessage
Interact	interact
Contact Optimization	Optimize
Marketing Operations	Plan
CustomerInsight	Insight
Digital Analytics for On Premises	NetInsight
PredictiveInsight	Model
Leads	Leads

## Syntax

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

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

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

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

```
configTool -u productName
```

## Commands

### **-d -p "*elementPath*"**

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

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

Note the following.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Note the following.

- When you use the `-r` option, the registration file must have `<application>` as the first tag in the XML.

Other files may be provided with your product that you can use to insert configuration properties into the Marketing Platform database. For these files, use the `-i` option. Only the file that has the `<application>` tag as the first tag can be used with the `-r` option.

- The registration file for the Marketing Platform is named `Manager_config.xml`, and the first tag is `<Suite>`. To register this file on a new installation, use the `populateDb` utility, or rerun the Marketing Platform installer as described in the *IBM Marketing Platform Installation Guide*.
- After the initial installation, to reregister products other than the Marketing Platform, use `configTool` with the `-r` option and `-o` to overwrite the existing properties.

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

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

## **Options**

#### **-o**

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

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

## **Examples**

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

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

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

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

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

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

## The alertConfigTool utility

Notification types are specific to the various IBM EMM products. Use the `alertConfigTool` utility to register the notification types when the installer has not done this automatically during installation or upgrade.

### Syntax

```
alertConfigTool -i -f importFile
```

### Commands

**`-i -f importFile`**

Import alert and notification types from a specified XML file.

### Example

- Import alert and notification types from a file named `Platform_alerts_configuration.xml` located in the `tools\bin` directory under the Marketing Platform installation.  
`alertConfigTool -i -f Platform_alerts_configuration.xml`

## The datafilteringScriptTool utility

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

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

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

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

### When to use datafilteringScriptTool

You must use `datafilteringScriptTool` when you create new data filters.

### Prerequisites

The Marketing Platform must be deployed and running.

## Using datafilteringScriptTool with SSL

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

- Truststore file name and path
- Truststore password

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

```
:call exec
```

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

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

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

```
:call exec
```

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

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

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

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

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

## Syntax

```
datafilteringScriptTool -r pathfile
```

## Commands

**-r *path\_file***

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

## Example

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

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

## The encryptPasswords utility

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

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

## When to use encryptPasswords

Use `encryptPasswords` as for the following reasons.

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

## Prerequisites

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

See Appendix A, “About Marketing Platform utilities,” on page 51 for additional prerequisites.

## Syntax

```
encryptPasswords -d databasePassword
```

```
encryptPasswords -k keystorePassword
```

## Commands

### **-d *databasePassword***

Encrypt the database password.

### **-k *keystorePassword***

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

## Examples

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

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

```
encryptPasswords -k myPassword
```

## The partitionTool utility

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

### When to use partitionTool

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

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

### Special characters and spaces

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

See Appendix A, “About Marketing Platform utilities,” on page 51 for additional restrictions.

### Syntax

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

### Commands

The following commands are available in the partitionTool utility.

#### -c

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

- Creates a new IBM EMM user with the Admin role in both the Administrative Roles policy and the global policy in Campaign. The partition name you specify is automatically set as this user’s password.
- Creates a new Marketing Platform group and makes the new Admin user a member of that group.
- Creates a new partition object.
- Replicates all the policies associated with the source partition and associates them with the new partition.
- For each replicated policy, replicates all roles associated with the policy.
- For each replicated role, maps all functions in the same way that they were mapped in the source role.
- Assigns the new Marketing Platform group to the last system-defined Admin role created during role replication. If you are cloning the default partition, partition1, this role is the default Administrative Role (Admin).

### Options

**-d *partitionDescription***



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

**`-g groupName`**

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

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

**`-n partitionName`**

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

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

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

**`-s sourcePartition`**

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

**`-u adminUserName`**

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

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

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

## Examples

- Create a partition with the following characteristics.
  - Cloned from `partition1`
  - Partition name is `myPartition`
  - Uses the default user name (`myPartitionAdminUser`) and password (`myPartition`)
  - Uses the default group name (`myPartitionAdminGroup`)
  - Description is "ClonedFromPartition1"

```
partitionTool -c -s partition1 -n myPartition -d "ClonedFromPartition1"
```
- Create a partition with the following characteristics.
  - Cloned from `partition1`
  - Partition name is `partition2`
  - Specifies user name of `customerA` with the automatically assigned password of `partition2`
  - Specifies group name of `customerAGroup`

– Description is "PartitionForCustomerAGroup"

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

## The populateDb utility

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

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

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

### Syntax

```
populateDb -n productName
```

### Commands

*-n productName*

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

### Examples

- Insert Marketing Platform default data manually.  

```
populateDb -n Manager
```
- Insert Campaign default data manually.  

```
populateDb -n Campaign
```

## The restoreAccess utility

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

### When to use restoreAccess

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

#### PlatformAdminRole users disabled

It is possible that all users with PlatformAdminRole privileges in the Marketing Platform might become disabled in the system. Here is an example of how the platform\_admin user account might become disabled. Suppose you have only one user with PlatformAdminRole privileges (the platform\_admin user). Assume the

Maximum failed login attempts allowed property in the **General | Password settings** category on the Configuration page is set to 3. Then suppose someone who is attempting to log in as `platform_admin` enters an incorrect password three times in a row. These failed login attempts cause the `platform_admin` account to become disabled in the system.

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

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

If the user login name you specify exists in the Marketing Platform as an internal user, that user's password is changed.

Only a user with the login name of `PlatformAdmin` and with `PlatformAdminRole` privileges can universally administer all dashboards. So if the `platform_admin` user is disabled and you create a user with `restoreAccess`, you should create a user with a login of `platform_admin`.

### Improper configuration of Active Directory integration

If you implement Windows Active Directory integration with improper configuration and can no longer log in, use `restoreAccess` to restore the ability to log in.

When you run `restoreAccess` in this way, the utility changes the value of the Platform | Security | Login method property from Windows integrated login to Marketing Platform. This change allows you to log in with any user account that existed before you were locked out. You can optionally specify a new login name and password as well. You must restart the web application server on which the Marketing Platform is deployed if you use the `restoreAccess` utility in this way.

### Password considerations

Note the following about passwords when you use `restoreAccess`.

- The `restoreAccess` utility does not support blank passwords, and does not enforce password rules.
- If you specify a user name that is in use, the utility resets the password for that user.

### Syntax

```
restoreAccess -u loginName -p password
```

```
restoreAccess -r
```

### Commands

**-r**

When used without the `-u loginName` option, reset the value of the Platform | Security | Login method property to Marketing Platform. Requires restart of the web application server to take effect.

When used with the `-u loginName` option, create a PlatformAdminRole user.

## Options

### **-u loginName**

Create a user with PlatformAdminRole privileges with the specified login name. Must be used with the `-p` option.

### **-p password**

Specify the password for the user being created. Required with `-u`.

## Examples

- Create a user with PlatformAdminRole privileges. The login name is tempUser and the password is tempPassword.  
`restoreAccess -u tempUser -p tempPassword`
- Change the value of the login method to IBM Marketing Platform and create a user with PlatformAdminRole privileges. The login name is tempUser and the password is tempPassword.  
`restoreAccess -r -u tempUser -p tempPassword`

## The scheduler\_console\_client utility

Jobs configured in the IBM EMM Scheduler can be listed and kicked off by this utility, if they are set up to listen for a trigger.

### What to do if SSL is enabled

When the Marketing Platform web application is configured to use SSL, the JVM used by the scheduler\_console\_client utility must use the same SSL certificate that is used by the web application server on which the Marketing Platform is deployed.

Take the following steps to import the SSL certificate

- Determine the location of the JRE used by the scheduler\_console\_client.
  - If JAVA\_HOME is set as a system environment variable, the JRE it points to is the one used by the scheduler\_console\_client utility.
  - If JAVA\_HOME is not set as a system environment variable, the scheduler\_console\_client utility uses the JRE set either in the setenv script located in the tools/bin directory of your Marketing Platform installation, or on the command line.
- Import the SSL certificate used by the web application server on which the Marketing Platform is deployed to the JRE used by scheduler\_console\_client. The Sun JDK includes a program called keytool that you can use to import the certificate. Consult the Java documentation for complete details on using this program, or access the help by entering `-help` when you run the program.
- Open the tools/bin/schedulerconsoleclient file in a text editor and add the following properties. These differ depending on the web application server on which Marketing Platform is deployed.
  - For WebSphere, add these properties to the file.  
`-Djavax.net.ssl.keyStoreType=JKS`  
`-Djavax.net.ssl.keyStore="Path to your key store JKS file"`

- Djavax.net.ssl.keyStorePassword="*Your key store password*"
- Djavax.net.ssl.trustStore="*Path to your trust store JKS file*"
- Djavax.net.ssl.trustStorePassword="*Your trust store password*"
- DisUseIBMSSLSocketFactory=false
- For WebLogic, add these properties to the file.
  - Djavax.net.ssl.keyStoreType="JKS"
  - Djavax.net.ssl.trustStore="*Path to your trust store JKS file*"
  - Djavax.net.ssl.trustStorePassword="*Your trust store password*"

If the certificates do not match, the Marketing Platform log file contains an error such as the following.

Caused by: sun.security.provider.certpath.SunCertPathBuilderException:  
unable to find valid certification path to requested target

## Prerequisites

The Marketing Platform must be installed, deployed, and running.

## Syntax

```
scheduler_console_client -v -t trigger_name user_name
```

```
scheduler_console_client -s -t trigger_name user_name
```

## Commands

### -v

List the scheduler jobs configured to listen for the specified trigger.

Must be used with the -t option.

### -s

Send the specified trigger.

Must be used with the -t option.

## Options

### -t *trigger\_name*

The name of the trigger, as configured in the scheduler.

## Example

- List jobs configured to listen for a trigger named trigger1.  

```
scheduler_console_client -v -t trigger1
```
- Execute jobs configured to listen for a trigger named trigger1.  

```
scheduler_console_client -s -t trigger1
```

---

## About Marketing Platform SQL scripts

This section describes the SQL scripts provided with the Marketing Platform to perform various tasks relating to the Marketing Platform system tables. They are designed to be run against the Marketing Platform system tables.

The Marketing Platform SQL scripts are located in the db directory under your Marketing Platform installation.

You must use the database client to run the SQL against the Marketing Platform system tables.

---

## Reference: Marketing Platform SQL scripts

This section describes the Marketing Platform SQL scripts.

### Removing all data (ManagerSchema\_DeleteAll.sql)

The Manager\_Schema\_DeleteAll.sql script removes all data from the Marketing Platform system tables without removing the tables themselves. This script removes all users, groups, security credentials, data filters, and configuration settings from the Marketing Platform.

#### When to use ManagerSchema\_DeleteAll.sql

You might want to use ManagerSchema\_DeleteAll.sql if corrupted data prevents you from using an instance of the Marketing Platform.

#### Additional requirements

To make the Marketing Platform operational after running ManagerSchema\_DeleteAll.sql, you must perform the following steps.

- Run the populateDB utility as described in “The populateDb utility” on page 62. The populateDB utility restores the default configuration properties, users, roles, and groups, but does not restore any users, roles, and groups you have created or imported after initial installation.
- Use the configTool utility with the config\_navigation.xml file to import menu items, as described in “The configTool utility” on page 53.
- If you have performed any post-installation configuration, such as creating data filters or integrating with an LDAP server or web access control platform, you must perform these configurations again.
- If you want to restore previously existing data filters, run the datafilteringScriptTool utility using the XML originally created to specify the data filters.

### Removing data filters only (ManagerSchema\_PurgeDataFiltering.sql)

The ManagerSchema\_PurgeDataFiltering.sql script removes all data filtering data from the Marketing Platform system tables without removing the data filter tables themselves. This script removes all data filters, data filter configurations, audiences, and data filter assignments from the Marketing Platform.

## When to use ManagerSchema\_PurgeDataFiltering.sql

You might want to use ManagerSchema\_PurgeDataFiltering.sql if you need to remove all data filters without removing other data in the Marketing Platform system tables.

**Important:** The ManagerSchema\_PurgeDataFiltering.sql script does not reset the values of the two data filter properties, Default table name and Default audience name. If these values are no longer valid for the data filters you want to use, you must set the values manually on the Configuration page.

## Removing system tables (ManagerSchema\_DropAll.sql)

The ManagerSchema\_DropAll.sql script removes all Marketing Platform system tables from a database. This script removes all tables, users, groups, security credentials, and configuration settings from the Marketing Platform.

**Note:** If you run this script against a database containing an earlier version of the Marketing Platform system tables, you might receive error messages in your database client stating that constraints do not exist. You can safely ignore these messages.

## When to use ManagerSchema\_DropAll.sql

You might want to use ManagerSchema\_DropAll.sql if you have uninstalled an instance of the Marketing Platform where the system tables are in a database that contains other tables you want to continue using.

## Additional requirements

To make the Marketing Platform operational after running this script, you must perform the following steps.

- Run the appropriate SQL script to re-create the system tables, as described in “Creating system tables.”
- Run the populateDB utility as described in “The populateDb utility” on page 62. Running the populateDB utility restores the default configuration properties, users, roles, and groups, but does not restore any users, roles, and groups you have created or imported after initial installation.
- Use the configTool utility with the config\_navigation.xml file to import menu items, as described in “The configTool utility” on page 53.
- If you have performed any post-installation configuration, such as creating data filters or integrating with an LDAP server or web access control platform, you must perform these configurations again.

## Creating system tables

Use the scripts described in the following table to create Marketing Platform system tables manually, when your company policy does not allow you to use the installer to create them automatically. The scripts are shown in the order in which you must run them.

Datasource Type	Script Names
IBM DB2	<ul style="list-style-type: none"> <li>ManagerSchema_DB2.sql</li> </ul> <p>If you plan to support multi-byte characters (for example, Chinese, Japanese, or Korean), use the ManagerSchema_DB2_unicode.sql script.</p> <ul style="list-style-type: none"> <li>ManagerSchema_DB2_CeateFKConstraints.sql</li> <li>active_portlets.sql</li> </ul>
Microsoft SQL Server	<ul style="list-style-type: none"> <li>ManagerSchema_SqlServer.sql</li> <li>ManagerSchema__SqlServer_CeateFKConstraints.sql</li> <li>active_portlets.sql</li> </ul>
Oracle	<ul style="list-style-type: none"> <li>ManagerSchema_Oracle.sql</li> <li>ManagerSchema__Oracle_CeateFKConstraints.sql</li> <li>active_portlets.sql</li> </ul>

If you plan to use the scheduler feature that enables you to configure a flowchart to run at predefined intervals, you must also create the tables that support this feature. To create the scheduler tables, run the appropriate script, as described in the following table.

Data Source Type	Script Name
IBM DB2	quartz_db2.sql
Microsoft SQL Server	quartz_sqlServer.sql
Oracle	quartz_oracle.sql

## When to use the create system tables scripts

You must use these scripts when you install or upgrade the Marketing Platform if you have not allowed the installer to create the system tables automatically, or if you have used ManagerSchema\_DropAll.sql to delete all Marketing Platform system tables from your database.



---

## Appendix B. Uninstalling IBM products

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

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

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.

Running the IBM uninstaller ensures that all configuration files, installer registry information, and user data are removed from the system. If you manually remove the files in your installation directory instead of running the uninstaller, the result might be an incomplete installation if you later reinstall an IBM product in the same location. After uninstalling a product, its database is not removed. The uninstaller only removes default files that get created during installation. Any file created or generated after installation is not removed.

---

### To uninstall IBM products

Follow these instructions to properly remove IBM products from your system.

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

1. If your IBM product has a web application deployed, undeploy the IBM EMM product web application from WebSphere or WebLogic.
2. Shut down WebSphere or WebLogic.
3. Stop any running processes that are related to the product you are removing.  
For example, stopping the Campaign or Contact Optimization Listener services before uninstalling those products.
4. Check your product installation directory for a `ddl` directory, and if one exists, you can run scripts provided there to drop tables from the system table database.
5. Run the IBM EMM uninstaller and follow the directions in the wizard.

The uninstaller is in the `Uninstall_Product` directory, where *Product* is the name of your IBM EMM product. The `Uninstall_Product` directory is in your product installation directory.

When you uninstall a product that was installed with the unattended mode, the uninstall also runs in unattended mode (without presenting any dialogs for user interaction).



---

## Contacting 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. To ensure that your problem is resolved efficiently and successfully, you collect information before you log your call.

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 IBM applications.

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