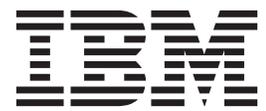


IBM Unica CustomerInsight
Version 8 Release 6.0
May 25, 2012

Installation Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 23.

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

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Chapter 1. Contacting IBM Unica technical support

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

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

Information to gather

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

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

System information

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

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

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under the installation directory for each application. If the `version.txt` file is not available, use the command `NetTracker admin -buildinfo` to obtain the version information.

Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (<http://www.unica.com/about/product-technical-support.htm>).

Chapter 2. About IBM Unica CustomerInsight

IBM Unica CustomerInsight provides marketers with the ability to visually and interactively analyze marketing data, including customer data or marketing objects. Through integration with the IBM suite, CustomerInsight allows marketers to take actions based on their analyses, such as targeting specific populations with marketing campaigns.

Specifically, CustomerInsight provides marketers with the following capabilities:

- **Easy visualization of customer data, through tabular and graphical views of dimensions and metrics**

Marketers can see accurate count information and other numeric metrics quickly (min, max, sum and average), while interactively selecting, drilling, and exploring new dimensions, all through an easy drag-and-drop interface.

- **Easy generation of EasySets without IT intervention**

Marketers can generate EasySets from tables of customer, prospect, or marketing data. CustomerInsight automatically generates dimensions, metrics, and filters for EasySets.

- **Easy-to-use interface for visually based target selection**

Marketers can view multiple dimensions of data simultaneously, as well as relationships between dimensions. CustomerInsight lets users work with varying levels of granularity (for example, different numbers of ranged bins for numeric variables), make selections, and subsequently refine them by drilling into additional dimensions. Users can add filters and various metrics at any time to provide additional information or aid in the visual selection process.

Benefits of IBM Unica CustomerInsight

IBM Unica CustomerInsight provides marketers with the following benefits:

- **The capability to easily answer marketing questions without IT intervention**

Users can quickly and easily gather data from disparate sources and generate a small, relevant EasySet for subsequent analysis, or they can interact with an EasySet created for them to answer their own marketing questions.

- **Ease-of-use and consistent interface for analysis**

Users do not need to learn complex analytical tools or use many different applications to analyze marketing data. Users can analyze both online data using IBM Unica NetInsight and combined online and offline customer data in IBM Unica CustomerInsight, using the same interface.

- **Integration with IBM Unica Marketing**

In addition to analyzing customer information, users can take action based on the analyses. For example, a marketer can visually select a set of customers for targeting in a marketing campaign.

Note: CustomerInsight can work with customer data generated through other IBM Unica applications, as well as with data from your own systems.

Chapter 3. About installing IBM Unica CustomerInsight

This section provides instructions on how to install and upgrade CustomerInsight.

Installation prerequisites

Before you begin the CustomerInsight installation process, ensure that:

- IBM Unica Marketing Platform is installed and running, and you know its URL.
- If you are using IBM Unica Campaign, it is installed and you know the name of the partition to use with this installation of CustomerInsight.

Note: Integration of CustomerInsight with Campaign is optional. However, because CustomerInsight uses the audience levels defined as part of a Campaign partition, if you are not using Campaign you must see “To add IBM Unica Campaign configuration data to IBM Unica Marketing Platform” on page 19.

- The database you intend to use for CustomerInsightsystem tables is set up and running. This is the database where EasySet data must be located for building EasySets. CustomerInsight also creates and manages EasySet data in this database. For more information, see the section for your database type:
 - Before installing CustomerInsight for SQL Server
 - Before installing CustomerInsight for Oracle
 - Before installing CustomerInsight for DB2

Note: If you are using Campaign with CustomerInsight you must also configure the CustomerInsight system database as a data source for Campaign. This is required to map the UAI_Selection and UAI_Selection_SQL system tables within Campaign and for the execution of saved CustomerInsight selections against the CustomerInsight system database. See the *IBM Unica Campaign Administrator’s Guide* for more information.

- The Web server you intend to use for CustomerInsight is set up and running. CustomerInsight supports the following Web servers:
 - IIS
 - Apache
- Users have their browsers set up to use CustomerInsight. For more information, see To configure Microsoft Internet Explorer.

For a complete list of IBM product versions compatible with this product, refer to the *IBM Product Compatibility Matrix* and any other product compatibility documents posted under Documentation on the IBM Customer Central web site (<https://customercentral.unica.com>).

For a complete list of third-party requirements for this product, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of CustomerInsight posted on the IBM Unica Customer Central web site (<https://customercentral.unica.com>).

Where to install IBM Unica CustomerInsight

Follow the guidelines below when installing CustomerInsight .

Installation location

A Web server must be installed and running on the server on which you install CustomerInsight .

CustomerInsight directories

Where you install CustomerInsight files is subject to your Web server configuration. These guidelines describe where to install files relative to other files on your server.

CustomerInsight uses three different directories:

- **CustomerInsight HTML directory:** Put this directory in its own subdirectory under your Web server's HTML document root. This is where CustomerInsight stores the reports it generates.
- **CustomerInsight CGI-BIN directory:** Put this directory in its own subdirectory under your Web server's CGI-BIN document root. On Windows running IIS this will typically be under the Scripts directory.
- **CustomerInsight program directory:** Put this directory in any location. On Windows, the default is C:\Program Files\Insight; on UNIX, the default is /usr/local/Insight.

This directory contains the binary and configuration files.

The system database

Each installed instance of CustomerInsight requires its own system table database. IBM does not support configuring two or more instances of CustomerInsight with the same database instance.

About UTF-8 support

CustomerInsight supports UTF-8 for Oracle and DB2 databases.

CustomerInsight does not support UTF-8 for Microsoft SQL Server databases.

Note: If you are planning on using UTF-8 contact, IBM technical support for additional guidance.

Case-sensitivity requirement for CustomerInsight databases

CustomerInsight requires a case-sensitive database. If your database is not case-sensitive, the CustomerInsight installation will not complete.

Important: Other products in the IBM Unica Marketing do not support case-sensitive databases. The databases for those products must be separate from the CustomerInsight database.

Before installing IBM Unica CustomerInsight for DB2

Your database server must be running a supported version of DB2®. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of CustomerInsight posted on the IBM Unica Customer Central web site (<https://customers.unica.com>).

You must know the user name, password, and database alias necessary to log onto your DB2 database server from your computer in order to complete the installation. If your computer is not currently configured as a DB2 client, consult the DB2 documentation for instructions.

Database code page

Your database should use a single-byte, case-sensitive, and accent-sensitive code page. You can use a UTF-8, IBM-1252 (on Windows systems) or ISO8859-1 (on UNIX systems) code page. If you are considering using a different code page, you should first contact IBM Unica technical support.

Note: If you are planning on using UTF-8, you are encouraged to contact IBM Unica technical support for additional guidance.

Before installing IBM Unica CustomerInsight for Oracle

Important: If you are installing on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

To install CustomerInsight , you need a valid user account for your Oracle database. This user account must have previously been granted the CONNECT role, and must have sufficient space available in the quota for the default tablespace. The amount of space available must be large enough to accommodate the total size of the data you expect to process with CustomerInsight .

Your database server must be running a supported version of Oracle. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of CustomerInsight .

You must know the user name, password, and service name necessary to log into your Oracle database server from your computer to install CustomerInsight .

If your computer is not currently configured as an Oracle client, consult the Oracle documentation for instructions.

Database and client character sets

The database and client character sets you use when creating your Oracle database can have a significant impact on CustomerInsight . The **WE8ISO8859P1** and **AL32UTF8** character sets are safe to use as both the database and the client character sets.

If you are considering using AL32UTF8 or a different character set, you should first contact IBM Unica technical support. If you do not know which character set you are using, contact your database administrator.

Note: The **US7ASCII** character set should never be used.

Oracle 10gR2 configuration

Important: Oracle 10gR2 is only supported for 32-bit Linux installations. If you are installing on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

With Oracle 10gR2, the CONNECT role alone is not sufficient for the CustomerInsight user to connect to the database. To enable successful database connections, you must grant the CustomerInsight user the following additional permissions:

- CREATE SESSION

This permission is needed to create a session. Oracle throws an ORA-01045 error when someone tries to connect to a database if this privilege is missing.

- ALTER SESSION

This permission is needed to alter your current session in one of the following ways:

- To enable or disable the SQL trace facility
- To change the values of NLS parameters
- To change your DBMS session label in Trusted Oracle
- To change the default label format for your session
- To close a database link
- To send advice to remote databases for forcing an in-doubt distributed transaction
- To permit or prohibit procedures and stored functions from issuing COMMIT and ROLLBACK statements
- To change the goal of the cost-based optimization approach
- In a parallel server, to indicate that the session must access database files as if the session were connected to another instance

- CREATE TABLE

This permission is needed to create a table, the basic structure to hold user data, specifying the following information:

- Column definitions
- Integrity constraints
- The table's tablespace
- Storage characteristics
- An optional cluster
- Data from an arbitrary query

Permissions required for Oracle users

All Oracle users require the following permissions in order for CustomerInsight to terminate database sessions associated with running reports that are canceled by a user or admin:

- ALTER SYSTEM
- SELECT on gv_\$session

If you are unable to grant these permissions to all users, check the reportschedule_qexec log file regularly. CustomerInsight logs error messages listing database sessions that were not terminated, so you can identify the sessions you must manually terminate.

Before installing IBM Unica CustomerInsight for SQL Server

To install CustomerInsight , you must have a valid user account for your SQL Server database. This user account must be granted the db_owner role on the

database that you intend to use for CustomerInsight . The amount of space available must be large enough to accommodate the total size of the data you expect to process with CustomerInsight .

Your database server must be running a supported version of SQL Server. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of CustomerInsight on the IBM Unica Customer Central web site (<https://customers.unica.com>).

If your computer is not currently configured as a SQL Server client, consult the SQL Server documentation for instructions.

SQL Server ODBC drivers

Your computer must have version 3.7 or later of the SQL Server ODBC driver installed. Acceptable versions of the SQL Server ODBC driver are included in the SQL Server distribution and are installed when SQL Server is installed. You can also find acceptable SQL Server ODBC drivers in the Microsoft Data Access Components package version 2.1 or later. If your computer does not currently have the correct SQL Server ODBC driver installed, consult the SQL Server documentation or the Microsoft data access Web site for instructions.

SQL Server case-sensitivity considerations

A default SQL Server installation treats character strings in a case-insensitive and accent-insensitive manner due to the default sort order setting. However, the CustomerInsight database must be both case-sensitive and accent-sensitive. (The installation does not complete with a case-insensitive database.) As a best practice, use a database with the Latin1_General_BIN collation order for Latin1 languages. Consult your SQL Server documentation for information and instructions on creating a case-sensitive database.

To install IBM Unica CustomerInsight on UNIX

Before proceeding with these instructions, please review the prerequisites to installation described earlier in the guide.

Before beginning the installation, note the complete URL for the IBM Unica Marketing installation that you want to connect to as well as the complete name of the Campaign partition to use with this installation of CustomerInsight.

1. Obtain the IBM Unica CustomerInsight DVD, or download the software from IBM.
2. Unpack the installer archive into a temporary directory. For example:

```
gunzip CustomerInsight -<version>-<database>-UNIX OS.tar.gz
tar xvf CustomerInsight -<version>-<database>-UNIX OS.tar
```
3. Change directories to the temporary directory.
4. Run the install program with the command `./ntinstall`.
5. Read and accept the license agreement.
6. Enter the following requested information when prompted.
 - For DB2, the instance name for the DB2 client and the user name, password, and database alias for the DB2 database.

For Oracle, the path to your Oracle client program directory (**ORACLE_HOME**) and the user name, password, and service name for the Oracle database.

Note: CustomerInsight tries to connect to the database. If it encounters difficulties, it displays an error message.

- The program directory to store executables.
 - The HTML directory in which to store HTML. This directory must be under the document root for your Web server reports.
 - The URL that corresponds to the HTML directory you specified.
 - The CGI-BIN directory. This directory must be set up as a CGI-BIN directory within your Web server software.
 - The URL that corresponds to the CGI-BIN directory you specified.
7. Enter the complete URL for the IBM Unica Marketing installation that you want to connect to, then the complete name of the Campaign partition to use.

Note: If you enter the incorrect IBM Unica Marketing URL, users are not able to log in and an error message states that the login failed.

8. Specify whether you want to enter information about your email server during the installation process. This allows users to email reports and send application error notifications to CustomerInsight administrators. If you do not configure mail server settings during installation you can do it later through the administration interface.

If you enter Yes, enter:

- a. The host name or IP address of your mail server.
- b. The TCP port on which your mail server is installed, or press Enter to accept the default of 25.
- c. The email address from which all reports will be sent.
- d. The email address(es) of the individuals who should be notified of errors. Separate multiple email addresses with commas.

After your review the values you entered and correct any mistakes, CustomerInsight finishes the installation and displays a URL for you to enter into your Web browser to begin.

Note: For Linux environments: The user running Apache requires write permission to the <CustomerInsight>/data/admin/logging directory. After installation, check the permissions on the logging directory. If they are owned by a user other than the Apache user, you may need to change their access permissions to allow write access to the Apache user if you have umasks set.

You should now enable users to connect to CustomerInsight from other IBM applications.

If you are using IBM Unica Campaign, you may need to add additional audience levels to work with your marketing data in CustomerInsight. See the *IBM Unica Campaign Administrator's Guide* for instructions.

If you are not using IBM Unica Campaign, add IBM Unica Campaign configuration data to IBM Unica Marketing Platform.

To install CustomerInsight on Windows

Before proceeding with these instructions, please review the prerequisites to installation described earlier in the guide.

Before beginning the installation, note the complete URL for the IBM Unica Marketing Platform instance that you want to connect to as well as the complete name of the IBM Unica Campaign partition to use with this installation of CustomerInsight.

1. Obtain the CustomerInsight DVD, or download the software from IBM.
2. Log in to the server console with administrative access rights.
3. Double-click the self-extracting archive.
4. Follow the on-screen instructions.

Note: If you enter the incorrect Marketing Platform URL, users are not able to log in and an error message states that the login failed.

You should now enable users to connect to CustomerInsight from other IBM applications.

If you are not using Campaign, you should also add Campaign configuration data to Marketing Platform.

If you are using IBM Unica Campaign, you may need to add additional audience levels to work with your marketing data in IBM Unica CustomerInsight. See the *IBM Unica Campaign Administrator's Guide* for instructions.

Note: If you are using an Oracle database and installed the Oracle client immediately before installing CustomerInsight, you must reboot the server before you can use CustomerInsight.

To upgrade IBM Unica CustomerInsight

Before beginning the upgrade, review the "Installation prerequisites" on page 5.

If you currently use CustomerInsight version 8.5.0, you can upgrade directly to version 8.6.0, as described below. If you are using an earlier version, you must first upgrade to version 8.5.0.

1. Back up the following directories
 - The program directory
 - On Windows, the default program directory is C:\Program Files\CustomerInsight.
 - On Unix, the default program directory is usr/local/CustomerInsight.
 - The HTML directory used by CustomerInsight
 - The CGI-BIN directory used by CustomerInsight
 - The CustomerInsight database
2. Run the installation program for your operating system and database.

When prompted for the program directory, you must select or enter the same directory in which CustomerInsight your previous version of Insight is installed.

Note: If you indicate a different directory, CustomerInsight is installed as a new program, and the pre-existing installation is not upgraded.

When you select or enter the CustomerInsight program directory for the pre-existing version, the installation program detects that you are upgrading, and uses existing installation information. As a result, you are not prompted to enter information about the database connection, IBM Unica Marketing and IBM Unica Campaign installations, HTML and CGI-BIN directories, or email settings.

The installation program upgrades your existing CustomerInsight installation to the current version.

Upgrade details are logged in the file `ntupgrade.log`, located in the `<installation_home>` directory.

When the upgrade process is complete, you must perform the following tasks:

- **Configure EasySets to use the geographic database (optional):** If you require access to geographic reports in any of your EasySets, configure each of these profiles to use the geographic database. For information, see the *CustomerInsight Configuration Guide*.
- **Resample any EasySets that use sampling.** Use the command `nettracker EasySet_name -resample` to resample the profile.

For information on database errors you might receive during the upgrade process, see the section for your database.

Note: On Windows, the upgrade creates a second CustomerInsight program group in the **Start** menu. You can delete one of the program groups.

DB2 installation error messages

The CustomerInsight installation program attempts to connect to your DB2 database and create tables that CustomerInsight needs to generate reports. During this test, you may receive an error message if CustomerInsight detects a problem with your current DB2 configuration that will prevent it from running. Some common error messages and their causes are:

- Could not allocate the environment handle
CustomerInsight was unable to find the local DB2 instance you specified.
- The database alias name or database name "NAME" could not be found
You specified an undefined database alias.
- A communication error has been detected. Communication protocol being used: "TCP/IP". Communication API being used: "SOCKETS". Location where the error was detected "". Communication function detecting the error: "connect". Protocol specific error code(s): "111", "*", "*"
The remote instance you are trying to connect to is not running.
- No start database manager command was issued
The local database you are trying to connect to is not running.
- Attempt to establish connection failed with security reason "#"
("<description>")
You do not have permission to log into the DB2 database (due to an incorrect user name, invalid password, etc.).
- User "USER NAME" does not have the CONNECT privilege
Your user name and password were correct, but you are not allowed to connect to the database.

- USER NAME does not have the privilege to perform operation "OPERATION"
You do not have the rights required to perform some of the database functions necessary to run CustomerInsight in the DB2 database you specified.
- Setup was unable to connect to the CustomerInsight interface using the CGI URL you provided.
This occurs post-installation on Windows/IIS platforms. To resolve the issue, edit the Internet Guest Account user (usually IUSR_<COMPUTERNAME>) by making it a member of the DB2USERS group. Then restart the IIS Admin service.

Most of these error messages are the result of problems with your DB2 configuration. If necessary, check your DB2 documentation for help resolving them.

Oracle installation error messages

The CustomerInsight installation program attempts to connect to your Oracle database and create tables that CustomerInsight needs to generate reports. During this test, you may receive an error message if CustomerInsight detects a problem with your current Oracle configuration that will prevent it from running. Some common error messages and their causes are:

- Could not resolve service name
CustomerInsight was unable to locate the computer where your Oracle service is running, or a service with the name provided running on that computer.
- Invalid user name/password
You do not have the ability to log onto the Oracle database with the user name and password you provided.
- No listener
You specified a service name which resolved to a computer that is not currently running Oracle.
- User lacks privilege
You do not have the rights required to perform some of the database functions necessary to run CustomerInsight in the Oracle database you connected to.
- No privileges on tablespace NAME
You do not have space in the database allocated to you.
- ld.so.1: ntinstall: fatal: libcIntsh.so.10.1: open failed: No such file or directory
You are installing CustomerInsight with Oracle 11g and do not have the Oracle Client 10.2 32-bit libraries on your LD_LIBRARYPATH. When installing CustomerInsight with Oracle 11g, you must use the Oracle 10.2 32-bit client. (Post-installation you can upgrade the client to version 11 if you choose.)

These error messages are a result of problems with your Oracle configuration. If you receive one of these error messages, check your Oracle documentation or ask your database administrator for help resolving it.

SQL Server installation error messages

The CustomerInsight installation program attempts to connect to your SQL Server database and create various tables that CustomerInsight needs to generate reports. During this test, you may receive an error message if CustomerInsight detects a problem with your current SQL Server configuration that will prevent it from running. Some common error messages and their causes are:

- Specified SQL server not found

CustomerInsight was unable to locate the computer where SQL Server is running.

- Login failed for user "username"

You do not have the ability to log into the SQL Server database with the user name and password you provided. Check with your database administrator for a valid user name.

- The user "user name" must have the db_owner role set for database "database"

You do not have the rights required to perform some of the database functions necessary to run CustomerInsight in the SQL Server database you specified.

These error messages are a result of problems with your SQL Server configuration. If you receive one of these error messages, check with your database administrator or your SQL Server documentation for help resolving it.

Chapter 4. About configuring third-party software

This section provides instructions on how to configure Web browsers and Web servers for use with CustomerInsight.

Configuring Microsoft Internet Explorer

For optimal performance, configure Internet Explorer to check for newer versions of stored pages every time you visit a web page.

Note: If you are using IBM Unica Marketing Platform for authentication, for greater security, set cookies to expire every time the browser closes.

Setting MIME types for Internet Explorer

Note: You must have administrative rights to complete this task.

You change the MIME settings for Internet Explorer to allow users to export report data as a .csv or .rtf file. In the Control Panel, configure the CSV, DOC, RTF, and XLS file types to confirm open after download.

Users should now see the **Save As** dialog box when exporting report data.

Note: You must change the MIME settings on the CustomerInsight Web server in addition to changing MIME settings for Internet Explorer.

About printing chart legends in Internet Explorer

The legends in CustomerInsight summary graphs are table cells with background colors set. By default, Internet Explorer does not print background colors. To print the legends in color, you must turn on background printing in Internet Explorer.

About Web server password protection

CustomerInsight contains features that you can use to restrict access to EasySets and options, but your Web server's built-in security must be used to completely restrict access. See the documentation for your Web server for more information.

About MIME types and exporting reports

CustomerInsight can export data, allowing users to import reports into popular software products such as Microsoft Excel, Access, and Word. CustomerInsight uses the .csv, .html, and .rtf extensions when exporting data. For optimal performance, the best practice is to add the MIME type application/octet-stream for the file extension .csv.

For more information consult your Web server documentation.

Enabling the scripts directory in IIS

In IIS the scripts directory is not enabled by default. The CustomerInsight installation program automatically enables the scripts directory. If necessary, you can manually enable the scripts directory. For more information, see the Microsoft IIS documentation.

About IIS directory permissions

You must ensure that the **Internet Guest Account** exists on the following directories, with **Full Control**, and that the control is propagated to all children objects.

- The CustomerInsight root installation directory
- The CustomerInsight directory in the IIS Web root directory (by default, C:\inetpub\wwwroot).
- The IIS scripts directory (by default, C:\inetpub\scripts).

Setting MIME types

You change MIME settings on the server to allow users to export report data as a .csv or .rtf file. Doing so allows users to access the **Save As** dialog box when they export a report. You must set both the .csv and .rtf file extensions to application/octet-stream. For more information, see your web server documentation.

Note: If users are not seeing the **Save As** dialog box when exporting data, you must change MIME settings for Internet Explorer.

To set MIME types on Apache

You change the MIME settings on the server to allow users to export report data as a .csv or .rtf file. Doing so allows users to access the **Save As** dialog box when they export reports. You need to set both the .csv and .rtf file extensions to application/octet-stream.

1. Change to the <ApacheHome>/conf directory. (UNIX only).
2. Open the file mime.types in a text editor.

On Windows:

- For releases prior to 2.2, the default location for mime.types is C:\Program Files\Apache Group\Apache\conf.
- For Apache 2.2, the default location for mime.types is C:\Program Files\Apache Software Foundation\Apache2.2\conf.

On UNIX, the default location for mime.types is /usr/local/apache/conf.

3. Change the line application/octet-stream bin dms lha lzh exe class to application/octet-stream bin dms lha lzh exe class csv rtf.
4. Save and close mime.types.
5. Restart Apache.

Users should now see the **Save As** dialog box when exporting report data.

If users do not see the **Save As** dialog box when exporting data, you must change MIME settings for Internet Explorer.

Chapter 5. About IBM Unica CustomerInsight integration with IBM Unica Marketing

IBM Unica CustomerInsight is integrated with IBM Unica Marketing as follows:

- **Suite-wide single sign-on**

Once a user signs on to one application in the suite (for example, CustomerInsight or Campaign), he or she can navigate between the suite applications without having to sign on a second time.

- **Central authentication**

You can configure CustomerInsight so that users are authenticated through the IBM Unica Marketing Platform.

Note: Users must be configured in the IBM Unica Marketing Platform in order to save group selections.

- **Audience-level configuration**

You define the audience levels that CustomerInsight uses when creating an EasySet through the Configuration Manager functionality in the Marketing Platform. You can also use Campaign to manage audience levels.

Note: There is a one-to-one correspondence between an CustomerInsight installation and a IBM Unica Marketing Platform installation. You can integrate one installation of CustomerInsight with one installation of the IBM Unica Marketing Platform.

To register IBM Unica CustomerInsight with the IBM Unica Marketing Platform

In order to use CustomerInsight with other IBM Unica Marketing products, you must register it with the IBM Unica Marketing Platform. Registration allows users to use a single sign on for all IBM Unica Marketing products and creates links in the IBM Unica Marketing interface to CustomerInsight .

Before you begin the registration process, complete the following tasks:

- Install both the IBM Unica Marketing Platform and CustomerInsight .
- Stop the Web application server that is serving the IBM Unica Marketing Platform.

To complete the registration process:

1. In a text editor, open `insight_config.xml`, located at the top level of the CustomerInsight installation directory.
2. Set the value of the **serverURL** property to the URL for CustomerInsight and save your changes to the file.

For example:

```
<property name="serverURL" type="string_property" width="40">
  <value>http://my_customerinsight_server/customerinsight_root</value>
</property>
```

By default, the URL is the computer name or IP address and installation root directory. You can copy the URL from the `NetTracker.cfg` file, under `<platform>/<htmlurl>`.

3. Run the IBM Unica Marketing Platform configTool as follows:

```
configTool -r Insight -f <INSIGHT_HOME>/insight_config.xml
```

This enables single sign on between CustomerInsight and the Marketing Platform.

Note: If you make a mistake or the CustomerInsight URL changes, you can change the value through the IBM Unica Marketing Platform.

4. Run configTool a second time, this time as follows:

```
configTool -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f <INSIGHT_HOME>/insight_navigation.xml
```

This enables the CustomerInsight menu item within the IBM Unica Marketing Platform.

Note: For more information on using the configTool utility, see the IBM Unica Marketing Platform documentation.

Important: To be able to view the CustomerInsight menu item within the Marketing Platform, individual users must be assigned the CustomerInsight User Role in the IBM Unica Marketing Platform. Without that assignment the menu item will not be visible.

To connect to other IBM Unica Marketing applications from IBM Unica CustomerInsight

Follow the instructions below when using CustomerInsight and you want to open another installed IBM Unica Marketing component.

In the upper-left corner, click **IBM**.
A new browser window opens displaying the Marketing Platform's main page.

To change your password through IBM Unica Marketing Platform

When CustomerInsight is using IBM Unica Marketing Platform authentication (the best practice authentication configuration option), after your user ID is initially created, or when your password expires, you receive a message that your password is expired when you log into CustomerInsight . To specify a new password, you must use IBM Unica Marketing Platform.

1. Open IBM Unica Marketing Platform.
2. Log in using your existing password.
You are then prompted to change your password.
3. Enter and confirm the new password, following the password rules established for Marketing Platform.
4. Save the new password.

You can now log in to CustomerInsight with the new password.

About IBM Unica CustomerInsight integration with IBM Unica Campaign

IBM Unica CustomerInsight provides a visual selection capability of customer populations for subsequent use in IBM Unica Campaign. After exploring and selecting data, CustomerInsight users can easily bring the selections into Campaign for targeting.

The typical workflow for this integration is as follows:

1. The Campaign user creates a flowchart with a **Snapshot** process that outputs a table of customer data based on certain selection criteria. That source table is created in the CustomerInsight system database.
2. From that source table you create an EasySet. You can visually explore the data and select the best set of targets for a particular campaign or offer.
3. You then save the selected data as a CustomerInsight selection and access it in Campaign using a **Select** process in a flowchart.

Note: In order to have access to the CustomerInsight Selection options in Campaign, you must first register CustomerInsight with the Marketing Platform. See the topic “To register IBM Unica CustomerInsight with the IBM Unica Marketing Platform” on page 17 for enabling users to connect to CustomerInsight from other IBM Unica Marketing applications.

About IBM Unica CustomerInsight and IBM Unica Campaign partitions

One installation of CustomerInsight works with one partition of Campaign.

You select the Campaign partition to work with during the CustomerInsight installation. You can change the Campaign partition through the CustomerInsight web interface.

Note: You must add Campaign partition configuration data to Marketing Platform for use with your installation of CustomerInsight if you are using Campaign. This is required to store audience levels to be used with CustomerInsight.

To add IBM Unica Campaign configuration data to IBM Unica Marketing Platform

Before you complete this task, you must have installed Marketing Platform and CustomerInsight, and Marketing Platform must not be running.

As a best practice, contact IBM technical support before beginning this task.

You must complete this task when you are using CustomerInsight and not using Campaign. Even though you are not using Campaign, CustomerInsight relies on Campaign configuration data being present in the central Marketing Platform database to create EasySets correctly. Specifically, you must define the audience levels to be used in EasySets as part of the Campaign configuration. When creating a new EasySet, CustomerInsight automatically searches the EasySet data for fields matching any audience levels defined in the Marketing Platform (field names are case-sensitive). Each EasySet table must contain the field(s) for at least one audience level. If multiple matches are found, the user can choose the desired audience level from a drop-down list of available options.

If Campaign is installed, you may not need to complete this task. If you require additional audience levels than those defined in Campaign, you may either follow these steps to add those additional audience levels, or, if you have appropriate administrative permissions in Campaign, you can add the audience levels through the Campaign interface. For instructions, see the *Campaign Administrator's Guide*.

Note: You can modify the name and type of an audience level through the Marketing Platform as needed. However, you cannot create new audience levels through the Marketing Platform. Therefore, you should add all the audience levels you anticipate using during this task.

1. Find and open the file `insight_no_campaign_load_audlevels.xml` in the CustomerInsight installation directory.

In this file, a single partition is configured, called **partition1**, under the categories named **Campaign/partitions**. You can keep this name, or change it. If you change it, ensure it matches the name defined in the IBM options.

Under **partition1**, audience levels are defined in the categories **InsightAudLevel1** and **InsightAudLevel2**.

By default, two audience levels are defined, named **Customer** and **Household**, as indicated by the value of the properties with the **name** attribute of *name*.

2. Modify or delete the default audience levels definitions as needed.
3. Create additional audience levels as needed.

To create a new audience level, copy the complete existing audience level definition, that is, the entire contents of the category named **InsightAudLevel1** or **InsightAudLevel2**. Then paste it after the **InsightAudLevel2** category, and change these elements at a minimum: The **<category name = audienceLevel>** must be edited to a unique value (for example, **audienceLevel2**) for each added audience level.

- The **name** attribute of the **<category>** element
- The **<value>** element of the property named **audienceName**
- For each field in the audience level, you must define properties for the **type** and **name** to match the database field.

For example, you could define a new audience level, Account, as follows:

```
<category name="InsightAudLevel3">
  <property type="string" name="numFields">
    <value>2</value>
  </property>
  <property type="string" name="audienceName">
    <value>Account</value>
  </property>
  <category name="field1">
    <property type="string" name="type">
      <value>text</value>
    </property>
    <property type="string" name="name">
      <value>Customer_Number</value>
    </property>
  </category>
  <category name="field2">
    <property type="string" name="type">
      <value>numeric</value>
    </property>
    <property type="string" name="name">
      <value>Account_Number</value>
    </property>
  </category>
</category>
```

4. Save the file.
5. Run the Marketing PlatformconfigTool utility as follows:

```
configTool -i -p "Affinium|Campaign" -f <Directory>/
insight_no_campaign_load_audlevels.xml -verbose
```

For more information on using the configTool utility, see the *Marketing Platform* documentation.

Campaign configuration information is now in the Marketing Platform central database. CustomerInsight can now use the audience levels defined there.

You can now edit the defined audience levels through Marketing Platform.

Note: If you edit an audience level that has been used in an EasySet, an error message is generated the next time a user attempts to update the EasySet.

You can now start the Marketing Platform.

Audience level configuration example

When you are using IBM Unica CustomerInsight without IBM Unica Campaign, or if you desire additional audience levels for broader analysis, you must manually add Campaign configuration data to IBM Unica Marketing Platform. You must do this to define the audience levels to use with EasySets. To add audience levels, you must add them to the `insight_no_campaign_load_audlevels.xml` file.

For more information, see the Marketing Platform documentation.

Example default audience level definition

The following is the content of the file `insight_no_campaign_load_audlevels.xml`.

```
<?xml version="1.0" encoding="UTF-8" ?>
<application name="Campaign">
  <displayName>Campaign</displayName>
  <category name="partitions">
    <category name="partition1">
      <category name="audienceLevels">
        <category name="InsightAudLevel1"> //must be unique
          <property type="string" name="numFields">
            <value>1</value>
          </property>
          <property type="string" name="audienceName">
            <value>Customer</value>
          </property>
          <category name="field1">
            <property type="string" name="type">
              <value>numeric</value>
            </property>
            <property type="string" name="name">
              <value>CustomerID</value>
            </property>
          </category>
        </category>
      </category>
    <category name="InsightAudLevel2">
      <property type="string" name="numFields">
        <value>2</value>
      </property>
      <property type="string" name="audienceName">
        <value>Household</value>
      </property>
      <category name="field1">
        <property type="string" name="type">
          <value>text</value>
        </property>
        <property type="string" name="name">
          <value>HHID</value>
        </property>
      </category>
    <category name="field2">
      <property type="string" name="type">
```

```

        <value>numeric</value>
      </property>
    <property type="string" name="name">
      <value>MemberNum</value>
    </property>
  </category>
</category>
</category>
</category>
</category>
</application>

```

Example new audience level definition

For new audience levels you create, you can copy the above code fragment, and paste it right after it. At a minimum you must change the value of the category **name** attribute and value for the property named **audienceName**. The following example shows a pasted and modified code fragment, for a new audience level AccountID.

```

<category name="InsightAudLevel13"> //supply a unique name
  <property type="string" name="numFields">
    <value>2</value>
  </property>
  <property type="string" name="audienceName">
    <value>Account</value> //supply a unique value
  </property>
  <category name="field1">
    <property type="string" name="type">
      <value>text</value>
    </property>
    <property type="string" name="name">
      <value>Customer_Number</value>
    </property>
  </category>
  <category name="field2">
    <property type="string" name="type">
      <value>numeric</value>
    </property>
    <property type="string" name="name">
      <value>Account_Number</value>
    </property>
  </category>
</category>

```

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