IBM Unica Distributed Marketing
Version 8 Release 6
May 25, 2012

Installation Guide

Note
Before using this information and the product it supports, read the information in "Notices" on page 49.

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

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Chapter 1. Preparing to Install

Installing IBM® Unica® products is a multi-step process that involves working with a number of software and hardware elements that are not provided by IBM Unica . While the IBM Unica documentation provides some guidance regarding specific configurations and procedures required to install IBM Unica products, for details on working with these systems that are not provided by IBM Unica , consult those products' documentation.

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

Distributed Marketing 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 Optimize. Additional details about these steps are provided in the rest of this guide.

Prepare data sources

1. "Create the Distributed Marketing system table database or schema" on page 5
   Work with a database administrator to create a database or schema for the Distributed Marketing system tables.
2. "Step: Create list tables in your customer database" on page 21
   To enable lists, you must create six tables in your customer database.
3. "Step: Configure the web application server for your JDBC driver" on page 5
   For each database type that Distributed Marketing will use, add the database driver to the web application server classpath.
4. "Step: Create the JDBC connections in the web application server" on page 6
   Create JDBC connections to the Distributed Marketing and Campaign system table databases and the database holding your list tables (usually your customer database). Be sure to use `UnicaPlatformDS` as the JNDI name for the connection to the Marketing Platform system tables.

Install Distributed Marketing

1. Chapter 3, "Step: Obtain the IBM installers," on page 9
   Download the IBM and Distributed Marketing installers.
2. "Information required to install all IBM Unica Marketing products" on page 12
   Gather the required database and web application server information.
3. "Step: Run the IBM Unica installer" on page 13
   After you have installed, deployed, and verified the Marketing Platform and Campaign, install Distributed Marketing.
4. "Step: Register Distributed Marketing manually, if necessary" on page 20

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If the Distributed Marketing installer was unable to register, use a Marketing Platform utility to register manually.

Deploy Distributed Marketing

1. Chapter 5, "Step: Deploy the Distributed Marketing web application," on page 23

   Follow the deployment guidelines.

Configure Distributed Marketing

1. "Step: Set up a system user" on page 27

   In the **Settings > Users** area of IBM Unica Marketing, set up a system user with administrative permissions in Campaign and Distributed Marketing.
2. "Step: Set parameters required for a basic installation" on page 27

   Edit the `collaborate_config.xml` file to set required parameters.
3. "Steps: Configure the list display" on page 29

   Set up database tables and edit the list XML files to set up the list display.
4. "Step: Map Distributed Marketing tables in Campaign" on page 37

   In Campaign, map the Distributed Marketing tables.
5. "Step: Verify your Distributed Marketing installation" on page 38

   Log in to IBM Unica Marketing Platform and confirm you can access the **Local Marketing** menu.

Prerequisites

The following are prerequisites for installing IBM Unica Marketing products.

System requirements

For detailed system requirements, see the *IBM Unica Marketing Enterprise Products Recommended Software Environments and Minimum System Requirements* guide.

JVM requirement

IBM Unica Marketing applications within a suite must be deployed on a dedicated Java Virtual Machine (JVM). IBM Unica Marketing products customize the JVM used by the web application server. You might need to create an Oracle WebLogic or WebSphere® domain dedicated to IBM Unica Marketing products if you encounter JVM-related errors.

Network domain requirement

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

Knowledge requirement

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

Client machines

Client machines must meet the following configuration requirements.

- Campaign uses an ActiveX control for flowcharts and administration functions. This flowchart automatically downloads when needed. The recommended security setting for the Internet Explorer browser is medium-low for local intranet. Specifically, the client browser must have the following options enabled:
  - Download signed ActiveX controls
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls marked safe for scripting
- The browser should not cache pages. In Internet Explorer, select **Tools > Internet Options > General > Browsing History > Settings** and choose the option that causes the browser to check for a newer version of the page on each visit.
- If software to block pop-up ad windows is installed on the client machine, Campaign might not function properly. For best results, disable the software to block pop-up ad windows while running Campaign.

Access permissions

Verify that your network permissions allow you to perform the procedures in this guide, and that you have logins with appropriate permissions.

Appropriate permissions include:

- The administrative password for your web application server.
- Administration access for all necessary databases.
- Write permission for all files that you must edit.
- Write permission for all directories where you must save a file, such as the installation directory and backup directory if you are upgrading.
- Appropriate read/write/execute permissions to run the installer.
- The operating system account that you use to run the web application server and IBM Unica Marketing components must have read and write access to the relevant directory and subdirectories.
- On UNIX, the user account that installs Campaign and the Marketing Platform must be a member of the same group as Campaign users. This user account must have a valid home directory, and have write permissions for that directory.
- On UNIX, all of the installer files for IBM Unica products must have full execute permissions (for example, `rwxr-xr-x`).

Marketing Platform requirement

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

Marketing Platform must be running so that:

- The products you install can register their configuration properties and security roles.
- You can set values for configuration properties on the Marketing Platform's Configuration page.

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

Unica Campaign requirement

You must install Campaign before you install Distributed Marketing.

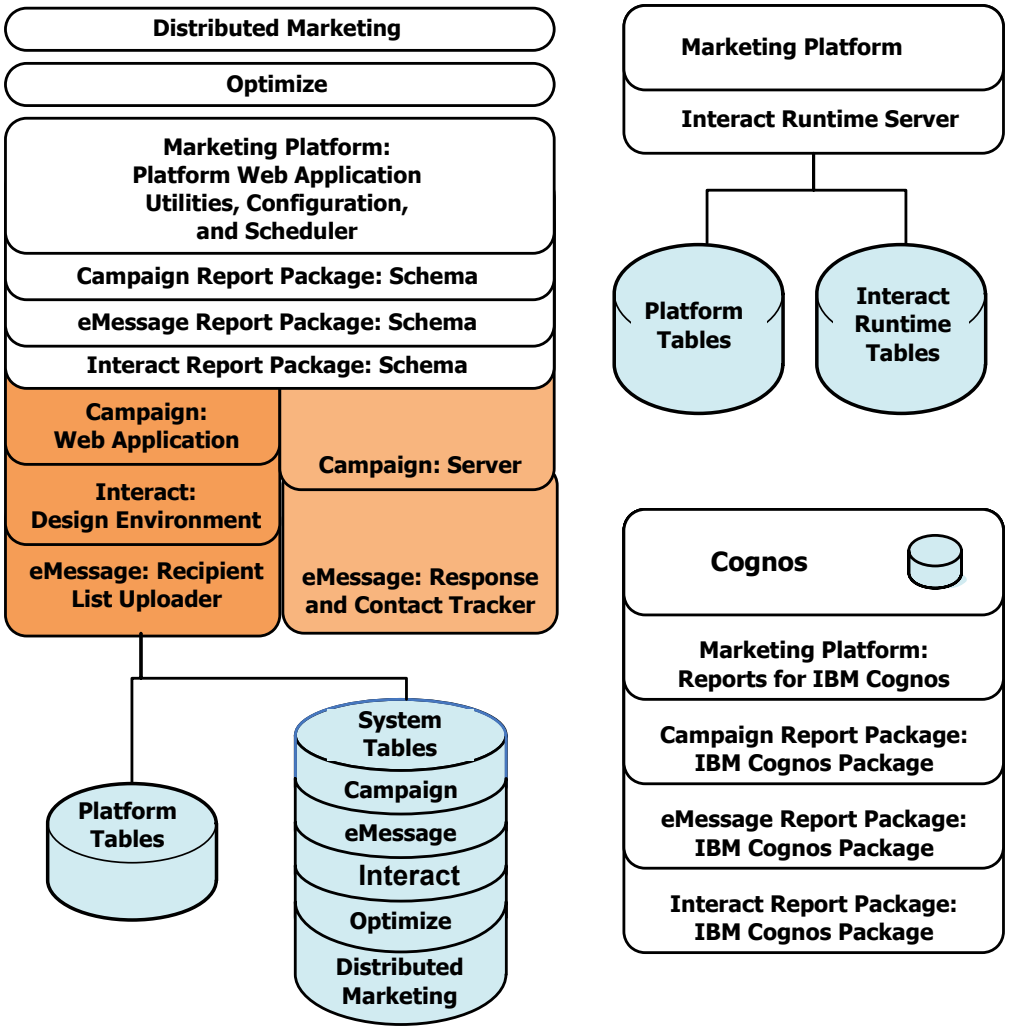
If you are upgrading

If you are upgrading, see the section on upgrading.

IBM Unica components and where to install them

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

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



Chapter 2. About preparing the IBM Unica Distributed Marketing data sources

You must set up the required data sources and JDBC connections for Distributed Marketing. You will enter the details about the system table database when you run the IBM installer later in the installation process, so you should print and fill in the "Unica Distributed Marketing data source information checklist" on page 8.

Create the Distributed Marketing system table database or schema

1. Work with a database administrator to create the required database or schema for IBM Unica Distributed Marketing.

   The Distributed Marketing system database should use UTF-8 character encoding. If you do not use UTF-8, you may encounter a problem when copying certain characters from a Microsoft Word document into Distributed Marketing. In an Oracle database, certain characters display as ? when you copy them from Word to a Distributed Marketing field. For DB2®, this issue causes a problem when you view objects. To fix the problem, you must go into the database and remove the problem characters.
2. Have the database administrator create an account for the database or schema. You will specify this account as a data source for a system user later in the installation process.

   This account must have at least CREATE, SELECT, INSERT, UPDATE, DELETE, and DROP rights.
3. Obtain the information about your database or schema and the database account and then print and complete the "Unica Distributed Marketing data source information checklist" on page 8.

Step: Configure the web application server for your JDBC driver

Use the following procedure to obtain the correct JDBC driver for your Distributed Marketing installation, and to configure your web application server to use it.

If Distributed Marketing must connect to databases from different vendors, perform this procedure for each database type.

1. Obtain the latest vendor-provided Type 4 JDBC driver supported by IBM. See the reference table or tables in this section for details.
   - If the driver does not exist on the machine where Distributed Marketing is installed, obtain it and copy it to the machine where you plan to deploy the Distributed Marketing web application. You may copy it to any location on the machine where you plan to deploy Distributed Marketing. IBM recommends you unpack the driver in a path that does not include spaces.
   - If you obtain the driver from a machine where the data source client is installed, verify that the version is the latest supported by IBM.

   The following table lists the driver file name or names for database types supported for IBM Marketing system tables.

Database type	File for jre 1.5	File for jre 1.6
Oracle 11	`ojdbc5.jar`	N/A

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Database type	File for jre 1.5	File for jre 1.6
Oracle 11g	ojdbc5.jar	ojdbc6.jar
DB2 9.7	db2jcc.jar db2jcc_license_cu.jar	db2jcc.jar db2jcc_license_cu.jar
SQL Server	sqljdbc.jar with JDBC2	sqljdbc4.jar with JDBC3

2. Include the full path to the driver in the classpath of the web application servers where you plan to deploy IBM Unica Marketing products, 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, set the classpath in the Administration console while you are setting up the JDBC providers for the IBM Unica Marketing products.
3. Restart the web application server so your changes take effect.

   During startup, monitor the console log to confirm that the classpath contains the path to the database driver.

Step: Create the JDBC connections in the web application server

The Distributed Marketing web application must be able to communicate with its data sources using JDBC connections. You must create the following JDBC connections in the web application server in which Distributed Marketing is deployed.

- The database holding the Distributed Marketing system tables
- The database holding the Marketing Platform system tables
- The customer database holding your list tables

This section provides guidelines for creating the connections in WebSphere and WebLogic.

JNDI names

- You must use UnicaPlatformDS as the JNDI name for the JDBC connection to the database that holds the Marketing Platform system tables. This is the required name.
- You should use collaborateds as the JNDI name for the JDBC connection to the database that holds the Distributed Marketing system tables. This is the default value of a configuration property that refers to this name. If you do not use the default value, you must set the value later in the configuration process.
- Use any name for the connection to the customer database.

Record the JNDI name in the "Unica Distributed Marketing data source information checklist" on page 8.

Information for JDBC connections

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

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

WebLogic

Use these values if your application server is WebLogic.

SQLServer

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

Oracle 11 and 11g

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

DB2

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

WebSphere

Use these values if your application server is WebSphere.

SQLServer

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

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

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

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

Oracle 11 and 11g

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

DB2

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

Unica Distributed Marketing data source information checklist

Record the information for your Distributed Marketing system tables database.

Field	Notes
Data source type	
Data source name	
Data source account user name	
Data source account password	
JNDI name collaborateds	

Chapter 3. Step: Obtain the IBM installers

Obtain the DVD, or download the software from IBM.

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

- The IBM installer.
- The Distributed Marketing installer.

The IBM Unica Marketing 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 files intended to be run in console mode, which are not operating system-specific. For UNIX, different files are used depending on whether the installation mode is X-windows or console. For example:

Windows - GUI and console mode - *ProductN.N.N.N*_win32.exe is version N.N.N.N and is intended for installation on the Windows 32-bit operating system.

UNIX - X-windows mode - *ProductN.N.N.N*_solaris64.bin is version N.N.N.N and is intended for installation on the Solaris 64-bit operating system.

UNIX - console mode - *ProductN.N.N.N*.sh is version N.N.N.N and is intended for installation on all UNIX operating systems.

Copying installation files (DVD only)

If you received your IBM Unica installation files on a DVD, or if you created a DVD from a downloaded ISO image file, you must copy its contents to a writable directory available to the system on which you are installing the IBM Unica products before running the installers.

Note: For more information about where to place the installation files, see "How the IBM Unica Marketing installers work."

How the IBM Unica Marketing installers work

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

Single directory requirement for installer files

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

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

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

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

Installing patches

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

Installation types

The IBM Unica installer performs the following types of installation.

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

  For products where installers automatically update the database, errors can occur during an upgrade because the installer does not create tables in the database if they exist. You can safely ignore these errors. See the chapter on Upgrading for details.
- **Reinstallation**: When you run the installer and select a directory where *the same* version of an IBM Unica Marketing product is installed, the installer automatically performs a new installation. For products where installers automatically update the database, reinstallation drops all existing tables and data and then creates new tables and populates them with default data. Reinstallation also overwrites all of the data in your existing installation directory for products where installers automatically update the database. To retain or restore data for a reinstallation:
  - When you run the installer, select the **Manual database setup** option.
  - Use the Marketing Platform `configTool` utility to export modified configuration settings, such as customized navigation menu items, before you reinstall.

  Typically, reinstallation is not recommended.

Installation modes

The IBM Unica installer can run in the following modes.

- Console (command line) mode

  In console mode, options are presented to you 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 to select 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 this [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 option numbers.

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

  Unattended mode can be used to install an IBM Unica product multiple times, for example when you set up a clustered environment. For more information, see "Installing multiple times using unattended mode."

Installing multiple times using unattended mode

If you must install IBM Unica Marketing products multiple times, for example when setting up a clustered environment, you may want to run the IBM Unica installer in unattended mode, which requires no user input.

About the response files

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

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

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

  Edit the sample files as needed and place them in the same directory with your installers.
- Before you set up an unattended run, you can run the installer in Windows GUI or UNIX X-windows mode or in Console mode and choose to create the response files.

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

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

  Important: For security reasons, the installer does not record database passwords in the response files. When you create response files for unattended

mode, you must edit each response file to enter database passwords. Open each response file and search for PASSWORD to find where you must perform these edits.

Where the installer looks for response files

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

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

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

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

Effect of unattended mode when you uninstall

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

Unattended mode and upgrades

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

Where to install Distributed Marketing components

For best performance, IBM recommends that you install Distributed Marketing on its own machine, where no other IBM Unica Marketing products are installed.

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

Component	Description
Distributed Marketing Server	The Distributed Marketing Server, which runs Lists, On-demand Campaigns, and Corporate Campaigns. For best performance, IBM recommends that you install this server on a dedicated system.
Distributed Marketing Developer Toolkits	The Distributed Marketing Developer Toolkits, which provide the Distributed Marketing APIs.

Information required to install all IBM Unica Marketing products

Gather the required information as described in this section.

Marketing Platform information

The installation wizards for each IBM Unica Marketing product must be able to communicate with the Marketing Platform system table database, to register the product.

Each time you run the installer, you must enter the following database connection information for the Marketing Platform system table database.

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

You obtained this information when you created the database or schema.

Web component information

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

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

Step: Run the IBM Unica installer

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

- You have downloaded the IBM Unica installer and the installers for products you plan to install. Both the IBM Unica and product installers must be in the same directory.
- You have available the information you gathered as described in "Information required to install all IBM Unica Marketing products" on page 12.

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

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

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

- GUI or X Window System mode

  Run the `Unica_Installer` file. On UNIX, use the .bin file.
- Console mode

  Open a command prompt and from the directory where you downloaded the IBM Unica software, run the `Unica_Installer` executable file as follows.

  On Windows, run the `Unica_installer` executable file with `-i console`. For example,*`Unica_Installer_N.N.N.N_OS`* `-i console`

On UNIX, run the `Unica_installer.sh` file with no switch.

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

- Unattended mode

  Open a command prompt and from the directory where you downloaded the IBM software, run the `Unica_Installer` executable file with `-i silent`. On UNIX, use the .bin file. For example, to specify a response file located in the same directory as the installer:

  `Unica_Installer_N.N.N.N_OS` `-i silent`

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

  `Unica_Installer_N.N.N.N_OS` `-i silent -f` *`filepath/filename`*

  For more information about unattended mode, see "Installing multiple times using unattended mode" on page 11.

IBM Site ID

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

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

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

Database environment variables

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

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

For UNIX installations only, enter the following information as indicated. For database types not listed on the installer screen, you can manually configure the setenv file as described in "Step: Set data source variables in the Campaign startup script (UNIX only)" on page 15 after the installation is complete.

Database environment variables

Database	Values to Enter
IBM DB2	• DB2 installation directory For example, `/usr/lpp/db2_06_01` or `C:\Program Files\IBM\SQLLIB`. This is the value you might set elsewhere as the `DB2DIR` environment variable. • DB2 instance path For example, `/home/db2inst1` or `C:\db2inst1`.
Microsoft SQL Server	No additional settings necessary.
Oracle	• Oracle installation directory For example, `/opt/oracle` or `C:\oracle`. This is the value you might set elsewhere as the `ORACLE_BASE` environment variable. • Oracle's home directory For example, `/home/oracle/product/11.1.0/db_1` or `C:\oracle\ora11.1`. This is the value you might set elsewhere as the ORACLE_HOME environment variable.

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

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

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

Note that if you modify this file when the Campaign server is already running, you must restart the server before changes to the setenv file are recognized. See "Step: Start the Campaign server" on page 18 for more details.

Refer to the "IBM Unica Campaign database information checklist" on page 18 for the required information to add to the setenv file.

Database and library environment variables (UNIX)

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

Database environment variables

Database	Syntax and Description
DB2	DB2DIR=*full_dir_path* export DB2DIR DB2 installation directory (for example, /usr/lpp/db2_06_01). . *full_path_to_db2profile* Sources the database configuration for DB2 users (e.g./home/db2inst1/sqllib/db2profile). Note the ". " (period and then a space).
Informix®	INFORMIXDIR=*full_dir_path* export INFORMIXDIR Informix client installation directory (for example, /export/home/informix/SDK2.90UC3) ODBCINI=*full_path_and_file_name* export ODBCINI Full path to the odbci.ini file INFORMIXSQLHOSTS=*full_path_and_file_name* Full path to the sqlhosts file
Netezza®	NZ_ODBC_INI_PATH=*full_dir_path* export NZ_ODBC_INI_PATH Directory location of the odbci.ini file (e.g. /opt/odbc64v51) ODBCINI=*full_path_and_file_name* export ODBCINI Full path to the odbc.ini file
Oracle	ORACLE_BASE=*full_dir_path* export ORACLE_BASE Oracle installation directory ORACLE_HOME=*full_dir_path* export ORACLE_HOME Oracle's home directory (e.g. /home/oracle/OraHome1).

Database	Syntax and Description
ODBC (Sybase)	SYBASE=*full_dir_path* export SYBASE Sybase installation directory (e.g. /home/sybase). ODBC=*full_dir_path* export ODBC Directory where the ODBC driver is installed (e.g. /home/sybase/drivers). ODBCINI=*full_path_and_file_name* export ODBCINI Full path to the obdc.ini file
Teradata	ODBCINI=*full_path_and_file_name* export ODBCINI Full path to the obdc.ini file

Library environment variable

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

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

Library directories for Oracle databases

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

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

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

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

Step: Start the Campaign server

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

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

IBM Unica Campaign database information checklist

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

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

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

Database information	Notes
If your database type is any of the following, make a note of the database installation directory. • DB2 • Informix (client) • Oracle • ODBC (Sybase)	
If your database type is any of the following, make a note of the location of the ODBC.ini file. • Informix • Netezza • ODBC (Sybase) • Teradata	
If your database type is ODBC (Sybase), make a note of the location of the ODBC driver in the database installation.	

Database information	Notes
For all database types when Campaign is installed on the Solaris, Linux, or AIX operation systems, make a note of the location of the `lib` directory in the database installation.	

Step: Check the installation log for errors

After the installation has completed, check the `udm-tools.log` file in the `/tools/logs/` directory of your Distributed Marketing installation for any errors.

Note: If you are performing a new installation, the error related to drop table commands is normal and expected.

To create an EAR file after running the installer

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

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

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

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

   If you plan to run the installer in unattended mode, you should back up the original `.properties` files, because when the installer runs in unattended mode, it clears these files. To create an EAR file, you need the information that the installer writes in the `.properties` files during the initial install.
2. Open a command window and change directories to the directory that contains the installer.
3. Run the installer executable with this option:

   `-DUNICA_GOTO_CREATEEARFILE=TRUE`

   On UNIX-type systems, run the `.bin` file rather than the `.sh` file.

   The installer wizard runs.
4. Follow the instructions in the wizard.
5. Before you create additional EAR files, overwrite the `.properties` file or files with the backup(s) you created before you ran in console mode for the first time.

Step: Register Distributed Marketing manually, if necessary

If the Distributed Marketing installer could not connect with the Marketing Platform system table database during the installation process, you see an error message that notifies you of this failure. The installation process will proceed, but in this case you must import the Distributed Marketing information into the Marketing Platform system tables manually.

The `configTool` utility is located in the `tools/bin` directory under your Marketing Platform installation. For detailed instructions on using the `configTool` utility, see "The configTool utility," on page 43.

Run the `configTool` utility, using the following example commands as guidelines. This imports configuration properties and menu items. Note that you run the utility as many times as there are files.

```
configTool.bat -v -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f
"%NAVIGATION_DIR%\DistributedMarketing_navigation_analytics.xml"

configTool.bat -v -i -p "Affinium|suite|uiNavigation|alerts" -f
"%NAVIGATION_DIR%\DistributedMarketing_alert.xml"

configTool -r Collaborate -f
"full_path_to_DistributedMarketing_installation_directory\conf\
DistributedMarketing_configuration.xml"

configTool -v -i -p "Affinium|suite|uiNavigation|mainMenu" -f
"full_path_to_DistributedMarketing_installation_directory\conf\
DistributedMarketing_navigation.xml"

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

Chapter 4. About pre-deployment configuration

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

Step: Create and populate the Distributed Marketing system tables

Important: This step is required only if you selected the manual database setup when you ran the installer, or if the automatic database setup failed during installation.

You must create the Distributed Marketing system tables in the system table database, and populate them with required data.

1. Open the *<Distributed_Marketing_home>*/tools/bin/setenv.bat or setenv.sh file in a text editor.
2. Set the JAVA_HOME and DBDRIVER_CLASSPATH parameters if they have not already been set.
3. Run the udmdbsetup.bat or udmdbsetup.sh file, located in the *<Distributed_Marketing_home>*/tools/bin directory. Follow the instructions for the type of installation you are performing: new installation, reinstallation, or upgrade.

If this is a new installation or a reinstallation:

Run udmdbsetup using the full installation parameter. Use the correct parameter values for your locale and installation type.The following example creates and populates the Distributed Marketing system tables for a new installation on Windows in the en_US locale:

```
udbmdbsetup.bat -Len_US -tfull -v
```

If this is an upgrade installation:

Run udmdbsetup using the upgrade parameter. Use the correct parameter values for your locale, installation type, and the version you are upgrading from. The following example creates and populates the Distributed Marketing system tables for an upgrade from version 8.2 on UNIX in the fr_FR locale:

```
udmdbsetup.sh -b8.2 -Lfr_FR -tupgrade -v
```

Step: Create list tables in your customer database

To enable lists, you must create six tables in your customer database:

- uacc_lists - a list of contacts generated as a List.
- uacc_ondemand_lists - a list of contacts generated by On-Demand Campaigns.
- uacc_corporate_lists - a list of contacts generated by a flowchart in a Corporate Campaign.
- uacc_permanent - a list of contacts to be permanently added to or deleted from Lists.

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- uacc_ondemand_permanent - a list of contacts to be permanently added to or deleted from On-Demand Campaigns.
- uacc_corporate_permanent - a list of contacts to be permanently added to or deleted from Corporate Campaigns.

Important: These tables store the selected contacts ID of the list and must be created in the same database as the customer tables.

To create the list tables

1. Add any additional columns for your audience level(s) in the listmanager.sql table creation script.

   The listmanager.sql file is in the tools\admin\db*db_type* directory under your Distributed Marketing installation, where *db_type* is the database you are using, sqlserver, oracle, db2, Netezza, or Teradata.
2. Execute the listmanager.sql script to create the required tables.

   Note the following.
   - The script creates the tables in the customer database.
   - You can also add columns to the tables based on your particular requirements for data filtering. For example, you can add a column to filter by region.

Step: Create Campaign system tables for Distributed Marketing

Important: This step is required only if you selected the manual database setup when you ran the installer, or if the automatic database setup failed during installation.

If you chose to set up your database manually when you ran the IBM Unica installer, you must create additional system tables in the IBM Unica Campaign system table database schema for Distributed Marketing.

Run the clb_systab_<db_type>.sql script located in the <*Campaign_home*>\ddl directory to create these tables. Run this script in the schema hosting the Campaign system tables.

Note: This step is not required if you chose the **Automatic database setup** option during installation.

Chapter 5. Step: Deploy the Distributed Marketing web application

To deploy Distributed Marketing, follow the guidelines in this section.

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

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

WebSphere guidelines

Follow the guidelines in this section when deploying IBM Unica Marketing application files on WebSphere.

- Be sure that the version of WebSphere meets the requirements described in the *IBM Unica Enterprise Products Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- Ensure that the JDK source level of the JSP compiler is set to Java 1.5, 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, ensure that the **JDK Source Level** is set to 15.

Steps for deploying on WebSphere

1. Deploy the IBM Unica application file as an enterprise application.
2. In the server's **Web Container Settings > Session Management** section, enable cookies.
3. In the server's **Applications > Enterprise Applications** section, select the EAR file or WAR files 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**.

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4. If your system tables are in DB2, go to the data source's Custom Properties. Set the value for **resultSetHoldability** to **1**.

   If you do not find a field named **resultSetHoldability**, add a custom property with that name and with the value set to **1**.
5. If you are deploying multiple IBM Unica applications, modify the session cookie name for each deployed application to ensure that it is unique, as follows:
   - In the server's **Applications > Enterprise Applications > [deployed_application] > Session Management > Enable Cookies > Cookie Name** section, specify the session cookie name.
   - Select the **Override session management** check box.

Specify generic JVM arguments

Specify following Generic JVM arguments in the server's Java Virtual Machine properties:

- `-Dcollaborate.home= Distributed Marketing installation directory`
- `-Dclient.encoding.override=UTF-8`
- For best results, set the memory heap size parameters for the JVM by entering 1024 in both the Initial Heap Size and Maximum Heap Size fields.

WebLogic guidelines

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

All versions of WebLogic, all IBM Unica Marketing products

- IBM Unica Marketing products customize the JVM used by WebLogic. You may need to create a WebLogic instance dedicated to IBM Unica Marketing products if you encounter JVM-related errors.
- Verify that the SDK selected for the WebLogic domain you are using is the Sun SDK by looking in the startup script (`startWebLogic.cmd`) for the JAVA_VENDOR variable. It should be set to: `JAVA_VENDOR=Sun` . If it is set to `JAVA_VENDOR=BEA` , JRockit has been selected. JRockit is not supported. To change the selected SDK, refer to the WebLogic documentation.
- Deploy the IBM Unica Marketing products as web application modules.
- On UNIX systems, you must start WebLogic from the console to allow correct rendering of graphical charts. The console is usually the machine on which the server is running. In some cases, however, the web application server is set up differently.

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

  Connecting to the UNIX machine via telnet or SSH always causes problems rendering charts.
- If you are configuring WebLogic to use the IIS plug-in, review the WebLogic documentation.

- Add the following parameters in the JAVA_OPTIONS section of startWeblogic.cmd or startWeblogic.sh:

  -Dcollaborate.home=*Distributed Marketing installation directory*
  -Dfile.encoding=*UTF-8*

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

Chapter 6. About post-deployment configuration

You must perform the tasks described in this section after you deploy Distributed Marketing.

Note that this is the minimum configuration you must perform for a basic installation. To use Distributed Marketing to fulfill your business needs, you will perform the additional configuration described in the *IBM Unica Distributed Marketing Administrator's Guide*.

Step: Set up a system user

Log in to IBM Unica Marketing as a user with the AdminRole role in the Marketing Platform and create a user with at least the following permissions.

- The DistributedMarketingAdminRole role in Distributed Marketing
- The Admin role in Campaign

Make a note of the user name, as you must use this name as the value of the `systemUserLoginName` and `flowchartServiceCampaignServicesAuthorizationLoginName` parameters in a later step.

Step: Set parameters required for a basic installation

To update the following parameters and additional configuration properties, go to **Settings** > **Configuration** in the IBM Unica Marketing user interface.

See the *IBM Unica Distributed Marketing Administrator's Guide* for complete details.

Parameter	Description
jndiname	JNDI name you configured in the web application server for the connection to the Distributed Marketing system table database.
systemUserLoginName	Login name of a Marketing Platform user to be used for system tasks (for example, the system task monitor or the scheduler). IBM strongly recommends that the system user not be a normal Distributed Marketing user.
notifyCollaborateBaseURL	The fully qualified URL for Distributed Marketing. Edit this URL by entering the computer name and company domain where you installed Distributed Marketing and the port number to the port on which the web application server is listening. For example, `http://collaborateserver.companyDomain:7001/collaborate`.

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Parameter	Description
flowchartServiceCampaignServicesURL	The URL to the CampaignServices web service that should be used to run flowcharts, get flowchart data, and so on. The default is `http://Server-Name:Port/Campaign/services/CampaignServices30Service`. where *Server-Name* and *Port* are defined by the `notifyCollaborateBaseURL` parameter. **Note:** Do not change the default value for this parameter unless Campaign is installed on a different machine or port than Distributed Marketing.
flowchartServiceCampaignServices AuthorizationLoginName	A Campaign user with administrative permissions, including access to all data sources, for example, asm_admin.
flowchartServiceNotificationServiceURL	The URL to Distributed Marketing's notification service that receives notifications from Campaign. **Note:** If you use a nonstandard context root, you must specify this parameter.
uploadDir	The full path to the Distributed Marketing upload directories. Edit this path to include the full path to the Distributed Marketing upload directories. For example, `c:\Unica\DistributedMarketing\projectattachments`. If you are using UNIX, confirm that Distributed Marketing users have permission to read, write, and execute files in this directory.
taskUploadDir	The full path to the Distributed Marketing task upload directories. Edit this path to include the full path to the Distributed Marketing task upload directories. For example, `c:\Unica\DistributedMarketing\taskattachments`. If you are using UNIX, confirm that Distributed Marketing users have permission to read, write, and execute files in this directory.
templatesDir	The full path to the Distributed Marketing template directories. Edit this path to include the full path to the Distributed Marketing template directories. For example, `c:\Unica\DistributedMarketing\templates`. If you are using UNIX, confirm that Distributed Marketing users have permission to read, write, and execute files in this directory.
serverType	The type of web application server you are using. The valid values are `WEBLOGIC` or `WEBSPHERE`.
defaultCampaignPartition	The default Campaign partition. Distributed Marketing uses this parameter if you do not define the <campaign-partition-id> tag in a project template file. Set value to `partition1` .
defaultCampaignFolderId	The default Campaign folder ID. Distributed Marketing uses this parameter if you do not define the <campaign-folder-id> tag in a project template file. Set value to `2`.
collaborateAttachmentsDIRECTORY_directory	Specifies the directory for attachments generated by flowcharts in Campaign. This path must match the default Campaign partition directory.

Parameter	Description
notifyEMailMonitorJavaMailHost	The machine name or IP address of your organization's SMTP server.
notifyDefaultSenderEmail	A valid email address for Distributed Marketing to use to send emails when there is otherwise no valid email address available to send notification emails.
templateAdminGroup_Name	The list of groups that have access to template configuration options. Groups with the same name must exist in Marketing Platform. You must separate multiple groups with commas. The default value is `Template Administrators`.
defaultListTableDSName	The datasource name used for templates while importing the template if the datasource name is not defined.
templateAutoGenerateNameEnabled	Whether the template name is auto-generated (`true`) or not (`false`). Default value is `true`.

Steps: Configure the list display

To enable corporate marketers to share lists with field marketers, you must configure these lists to link to your customer data. As you configure your Distributed Marketing database settings, you first need to create the list tables. Later, you configure the display format, search criteria, and table relationships.

To set up the list display, you perform the following procedures.

- "Optional step: Set up data filters for the list display"
- "Step: Create list tables in your customer database" on page 21
- "Step: Configure the View List and Search List pages" on page 30

Optional step: Set up data filters for the list display

Data filters are available across the Marketing Platform, enabling you to limit what data IBM Unica Marketing users can see.

For example, you can create a data filter based on region so your regional field marketers can see only the customers in their region. The data filters apply to all data viewed in Distributed Marketing, including when you create lists, when field marketers review lists and search for other contacts, and when working with forms.

Components affected by data level filtering for the list display

Configuring these data filters requires coordination between three components of the Marketing Platform:

- The data filters in the Marketing Platform as a whole
- Lists and forms in Distributed Marketing
- Table mapping and flowcharts in Campaign

Example workflow for configuring data filters

The following example shows the steps involved were you to set up data level filtering for the list display bases on your customers' regions:

1. Create a **region_id** column in the list tables in Distributed Marketing.

2. Create data filters in the Marketing Platform for each region, based on the **region_id** column of the list manager tables in your customer database.
3. Map the **region_id** column in the list tables to the **region_id** column in your customer database using Campaign.
4. Create flowcharts in Campaign that populate the **region_id** column.
5. Configure the list display and the form templates in Distributed Marketing to filter on the **region_id** column.

Note: As shown in the above example, data filtering requires planning and is an iterative process. You must coordinate your configuration across the Marketing Platform, Campaign, and Distributed Marketing. You must ensure that you use the same naming conventions across these components.

Step: Configure the View List and Search List pages

To enable field marketers to review the lists, you must format and configure the View List and Search List pages. The following guidelines describe the general changes you must make to the View List and Search List configuration files.

Note: If no search screen is configured for an audience level, users cannot add records when reviewing a list for this audience level; the **Add Records** link is disabled.

Configuring the database connection

Edit the `listmanager_tables.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

- Define the data source containing your customer tables.
- Define the tables you want to access.
- Define the columns in the tables that you want to display on the View List page.

Note: There is only one copy of `listmanager_tables.xml`, and it defines the columns that are used in view list and search list screens. Configure the `listmanager_tables.xml` appropriately for both the `listmanager_list.xml` and `listmanager_searchScreens.xml` files.

Configuring the View List page

Edit the `listmanager_list.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

- Define the type of data views with the List element.
- Define the data that appears in each view.
- Define the sort order of each view.
- Define an application to display customer details.

Configuring the List Search page

Edit the `listmanager_searchScreens.xml` file, located in the `conf` directory under your Distributed Marketing installation, as follows:

- Define the available search criteria.
- Define the way Distributed Marketing displays the results.

About disabling the List Manager List tables

If you do not want to use the List Manager, you need to edit the `DistributedMarketing_configuration.xml` file and set the `listManagerEnabled` parameter to `false`.

List display configuration files

Distributed Marketing controls the display of lists through three XML files:

- listmanager_tables.xml
- listmanager_list.xml
- listmanager_searchScreens.xml

These files are located in `conf` directory under your Distributed Marketing installation.

At installation, these XML files are populated with examples that work with the sample data provided.

Note the following:

- To add special characters to the listmanager XML files, use Unicode encoding. For example, é should be encoded as `U+00E9`.
- To use certain characters in the configuration files, you must use XML entities. For example, using < as a value will break the configuration file, as it is part of the XML syntax. You must use the entity for <, which is `<`.
- If you update the listmanager XML files (for example if you add new columns or a new list display), you must also update the corresponding properties files (`list_`*`language`*`.properties` and/or `searchscreen_`*`language`*`.properties`).

listmanager_tables.xml

You can use the `listmanager_tables.xml` file to declare the following:

- The audience level of the data model of your organization on which the list content is based
- The data source
- The tables used in the search and list screens

AudienceLevel

`AudienceLevel` defines the audience levels of your data model. It contains the following attributes:

- `Label` - A short description of the audience level.
- `Name` - The code for identifying the audience level. This must match the `AudienceLevel` attribute of the list element of the `listmanager_list.xml` file.
- `Table` - The name of the table which contains the audience level.
- `Datasource` - The name of the datasource used to access the table from the customer database.

For example:

```
<AudienceLevel Label="Indiv" Name="Individual" Table="v_indiv_contact"
  Datasource="JNDI_Name_for_customer_DB">
```

Each `AudienceLevel` element contains a child element, `Column`:

```
<AudienceLevel ...>
  <Column... />
</AudienceLevel>
```

Column

The Column parameter specifies the ID column in the audience level table. Column contains a single attribute, Name, for the name of the ID column(s) in the Audience table. For example:

```
<Column Name="Indiv_ID"/>
```

DataSource

The Datasource element defines the data source declared to access the tables. It contains the following attributes:

- Name - The JNDI name of the data source in the web application server.
- Type - The database type. The valid values are SQLSERVER, DB2, ORACLE, NETEZZA, or TERADATA.
- DecimalSeparator - The character which denotes the decimal place. The valid values are period (.) or comma (,).

For example:

```
<Datasource Name="ACC_DEMO" Type="SQLSERVER" DecimalSeparator="."/>
```

Table

Table defines the tables on which the search screens and list screens are based. This element contains the following attributes:

- Name - The name of the table.
- DataSource - The data source used to access the table.
- Owner - The owner or schema of the database (used to prefix the table name).

For example:

```
<Table Name="v_indiv_contact" Datasource="ACC_DEMO" Owner="dbo">
```

Each Table element contains a child element, Column, which can optionally include a LinkedTo parameter:

```
<Table ...>
 <Column...>
  <LinkedTo ... />
 </Column>
</Table>
```

Column

The Column parameter describes each column in the table defined by the parent Table element. It contains the following attributes:

- Name - The name of the column.
- Type - The type of data stored in the column. Valid values are A (alphanumerical), N (numerical), D (date stored as VARCHAR yyyymmdd), F (date stored as DATE/DATETIME).
- Length - The length of the column.
- DecimalLength - The length of the decimal part for a numeric column.

For example:

```
<Column Name="Indiv_ID" Type="N" Length="10" />
```

The LinkedTo parameter specifies the relationship between a column and a table that defines references. For example, a table contains userID and householdID columns. These columns need to reference another table that relates userID to the Customer audience and householdID to the Household audience.

This element contains the following attributes:

- Table - The table where the reference is defined.
- Column - The key column of the table on which the reverence is defined.

For example:

```
<LinkedTo Table="v_indiv_contact" Column="Indiv_ID"/>
```

listmanager_list.xml

You can use the listmanager_list.xml file to configure the view list screens.

List

The List element describes the list display format. You can define several display formats as long as the code is unique. You can choose the format to apply when opening the list screen. For example, you can create a contact format that displays only the name, address, and phone number of the contact and create a demographic format to display the income, age, and gender of the contact.

This element contains the following attributes:

- Name - The name of the list display format.
- Code - The code of the list display format. It must be unique.
- AudienceLevel - The audience level the list display format is based on. This audience level is defined in the listmanager_tables.xml file.
- Multiple - If set to true, you can select more than one member of the list. If set to false, you can only select one member of the list.
- Datasource - The name of the datasource used to access the table from the customer database.

For example:

```
<List Name="Contact" Code="CONTACT" AudienceLevel="Individual"
 Datasource="JNDI_Name_for_customer_DB">
```

Each List element can contain Select, Order, and Link child elements:

```
<List ... >
 <Select ... />
 <Order ... />
 <Link . . . />
</List>
```

Select

The Select element describes the table and columns to display in the list content. Distributed Marketingdisplays the columns in the same order as they appear in this file.

This element contains the following attributes:

- Table - The name of the table to display. It must also be defined in the listmanager_tables.xml file.
- Column - The name of the column to display from the related table. It must also be defined in the listmanager_tables.xml file.
- Label - The label of the column header. It is a tag that will be replaced by localized descriptor contained in each list_*language*.properties resource bundle file.

For example:

```
<Select Table="v_indiv_contact" Column="indiv_id" Label="indiv_id"/>
```

Order

The Order element describes the default sorting column(s). It contains the following attributes:

- Table - The name of the table that contains the sorting column(s). It must also be defined in the listmanager_tables.xml file.
- Column - The column on which the sorting is based. It must also be defined in the listmanager_tables.xml file.
- Label - The order type. The valid values are ASC for ascendant sorting or DESC for descendant sorting.

For example:

```
<Order Table="v_indiv_contact" Column="last_name" Type="ASC"/>
```

Link

The Link element describes the URL for the external application that contains customer details. The Link element is optional. It contains the following attributes:

- URL - The base URL of the application, without any parameters.
- Label - The link label or icon tool tip.
- Logo - The name of a file as use as the icon. (optional)
- LogoHeight - The height of the icon. (Use only with the Logo attribute.)
- LogoWidth - The width of the icon. (Use only with the Logo attribute.)
- NavName - The browser name.

Each Link element can contain multiple Param child elements.

For example:

```
<Link Url="http://localhost:7073/LeadsContact/callLeads.jsp"
Label="last_name" Logo="contact.gif">
 <Param Name="affiniumUserName" Type="user" Value="userlogin"/>
 <ParamName="LeadsRmcTbid" Type="column"
 Value="v_customer_contact.customer_id"/>
</Link>
```

Param

The Param element describes a parameter to add to the base URL. It contains the following attributes:

- Name - The http parameter name.

- Type - The type of information to send. The valid values are user to send the current logged user information and column to send the value of a specified column.
- Value - The specific information to send. If the Type attribute value is user, the valid values of the Value attribute are userlogin and userid. If the Type attribute value is column, the valid value of the Value attribute is the column whose value should be appended to the base URL, specified as Table.column.
- DateFormat - The format for sent dates. Used only for a date column (type D or F).

For example:

```
<Param Name="affiniumUserName" Type="user" Value="userlogin"/>
<ParamName="LeadsRmcTbid" Type="column" Value="v_customer_contact.customer_id"/>
```

listmanager_searchScreens.xml

You can use the listmanager_searchScreens.xml file to customize list search screens based on audience level and other criteria.

This file defines:

- The criteria fields
- The displayed result fields

You can define several search screens based on different audiences, different criteria and/or searching results to be used in Distributed Marketing When the field marketers use search, the screen appearance is based on the audience levels configured the listmanager_tables.xml file. If the various screens are based on the same audience level, the field marketer can choose from the various pre-defined searches. For example, you can create a basic search that only contains name and address, then an advanced search which contains name, address, income, and account activity.

You can choose not to define a search screen for a given audience level in order to prevent adding people to the List Manager for a given campaign or List. The field marketers would not be able to add a contact based on that audience level because no search screen had been defined.

Following are descriptions of each element and sub-element as well as their related attributes.

Listmanager_searchScreen.xml contains several SearchScreen elements. Each of these sets up a multi-criteria search screen criteria and result set. This element contains the following attributes:

- Name -The name of the screen.
- AudienceLevel - The audience level the search screens will be based on. The AudienceLevel is defined in the listmanager_tables.xml file.
- Label - The label of the column header.
- MultiSelect - If set to true, you can select more than one element in the final list. If set to false, you can only select one element in the final list.
- Datasource - The name of the datasource used to access the table from the customer database.

For example:

```
<SearchScreen Name="default_indiv_search" AudienceLevel="Individual"
 Label="default_indiv_search" MultiSelect="true"
 Datasource="JNDI_Name_for_customer_DB">
```

Each SearchScreen tag has the following structure:

```
<SearchScreen ... >
 <Criteria ... >
  <Field ... >
   <Lookup ... />
  <Field ... />
 </Criteria>
 <Result ... >
  <Field ... />
  <Order ... />
 </Result>
</SearchScreen>
```

Criteria

The Criteria element specifies the search criteria. It contains the Field element, which describes the search criteria fields.

Field

The Field element contains the following attributes:

- Table - The table on which the search is based.
- Column - The column on which the search is based.
- Label - The descriptor that appears on the screen for the criteria. It is a tag that will be replaced by localized descriptor contained in each searchScreen_*language*.properties resource bundle file.
- Operator - The type of operation. The valid values are =, like, <, >, <=, >=, <>.
- Default - The optional default value. It can be set to @userlogin and will be replaced by the user login at execution.
- Order - The display order of the criteria on the screen.
- Long - (Optional) The length of the criteria value. If this is not specified, the criteria takes the value defined in the attribute length of the table's column in the listmanager_tables.xml file.
- Minimallength - (Optional) The minimal number of characters of the criteria value.
- Case - (Optional) The case of the criteria value. The valid values are Lower or Upper.
- Displayed - (Optional) Whether the criteria is displayed or hidden. The valid values are true or false.

For example:

```
<Field Table="v_indiv_contact" Column="username" Label="username"
 Operator="=" Displayed="false" Default="@userlogin" Order="5"/>
```

A Field element can contain a Lookup element. The Lookup element specifies how to populate a list box criteria. The Lookup element contains the following attributes:

- Table - The table containing the data of the list.
- Id - The ID column containing the data of the list.
- Desc - A description of the list.

- `Where` - (Optional) Enables you to filter the values according to a Where clause.
- `Display` - (Optional) Specifies what is displayed in the list box: the code and/or the description. The values can be: `id`, `desc`, `id - desc`, or `desc - id`.

For example:

```
<Lookup Table="lkp_region" Id="Region_id" Desc="Region"
Where="" Display="desc"/>
```

Result

The `Result` element specifies the searching results set. It contains `Field` and `Order` elements.

Field

The `Field` element specifies the displayed result fields. `Field` contains the following attributes:

- `Table` - The table containing the searching results.
- `Column` - The column containing the searching results.
- `Label` - The descriptor that appears on the header of the result list.
- `Format` - The format (such as code and/or description) to display in the list box criteria in the case of a column that has a relationship with a lookup table. The value can be `code`, `label`, `code - label`, or `label - code`.

For example:

```
<Field Table="v_indiv_contact" Column="Indiv_ID" Label="indiv_id"/>
```

Order

The `Order` element specifies the displayed sorting column for the result records. `Order` contains the following attributes:

- `Table` - The table of the column on which the records are sorted.
- `Column` - The columns on which the records are sorted.
- `Type` - The sorting order. The valid values are `ASC` or `DESC`.

For example:

```
<Order Table="v_indiv_contact" Column="Last_Name" Type="ASC"/<
```

Step: Map Distributed Marketing tables in Campaign

You must map the list tables in Campaign. Map the following tables.

- uacc_lists
- uacc_ondemand_lists
- uacc_corporate_lists
- uacc_permanent
- uacc_ondemand_permanent
- uacc_corporate_permanent

For information about mapping tables, see the *Campaign Administrator's Guide*.

Step: Map Campaign system tables for Distributed Marketing

After running the clb_systab_<db_type>.sql script in the schema hosting the Campaign system tables, you must map the new tables in Campaign.

Map these tables as follows:

System table	Database table to map to
Process Table	UA_Process
FlowChart Parameters Table	UA_ProcAttribute
User Variables table	UA_UserVariable
User Variable Enumeration Table	UA_EnumUserVarVal
Display Order Table	UA_ccDisplayOrder
Run Result Table	UA_RunResult
Sub Attribute Table	UA_Subattribute

For instructions on mapping system tables in Campaign, see the *IBM Unica Campaign Administrator's Guide*.

Step: Change CollaborateIntegrationServicesURL parameter

1. Open **Settings > Configuration > Campaign > Collaborate**.
2. For **CollaborateIntegrationServicesURL**, click **Edit Settings**.
3. Change http://server:port/collaborate/services/CollaborateIntegrationServices/1.0 to http://server:port/collaborate/services/CollaborateIntegration Services1.0.

Step: Verify your Distributed Marketing installation

To verify that you have installed Distributed Marketing, log into IBM Unica Marketing and confirm you can access the **Local Marketing** menu. The **Local Marketing** menu provides access to Lists, On-demand Campaigns, Corporate Campaigns, your Subscriptions, and your Calendar.

If you restart either the Campaign or Distributed Marketing web application, you must restart both.

Chapter 7. About upgrading Distributed Marketing

Before you upgrade from any version of Distributed Marketing, be sure that you have read and understood all the topics in this section, to understand what you must do to upgrade from your old version of Distributed Marketing to the new version.

Order of upgrading

The same considerations described in "Where to install Distributed Marketing components" on page 12 apply when you upgrade.

Distributed Marketing upgrade scenarios

Follow these guidelines for upgrading Distributed Marketing.

Source version	Upgrade path
Affinium Collaborate 7.x or pre-8.5 versions of Distributed Marketing	You must upgrade to Distributed Marketing 8.5 before you can upgrade to Distributed Marketing 8.6.0.
Distributed Marketing 8.5	Perform an in-place installation of version 8.6.0 over Distributed Marketing 8.5.

Upgrading from Distributed Marketing 8.5

Perform the tasks detailed in this section to upgrade from Distributed Marketing 8.5 to the new version of Distributed Marketing.

Back up Distributed Marketing

Back up all files and the Distributed Marketing database before beginning the upgrade process. This is highly recommended as it provides you a way to restore to a known working state in case of issues during the upgrade process.

Undeploy Distributed Marketing

You must perform this step so that the web application server releases the lock on the WAR file from your Distributed Marketing source system, which will be updated by the Distributed Marketing upgrade installation. This allows the Distributed Marketing upgrade to register the new version of Distributed Marketing in Marketing Platform.

Shut down and restart the web application server

After undeploying IBM Unica Distributed Marketing, shut down and restart the web application server to ensure that the lock on the WAR file is released.

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Install Distributed Marketing in upgrade mode

Follow the detailed installation steps in "Step: Run the IBM Unica installer" on page 13 to install Distributed Marketing in upgrade mode.

When prompted for the install location during installation, specify the location of the parent directory of the Distributed Marketing installation directory.

The installer detects your existing version of Distributed Marketing and prompts you to confirm the upgrade. After you confirm the upgrade, the installer automatically performs an upgrade install.

The upgrade installation will update the previously migrated registration information for the new version of Distributed Marketing.

Step: Create and populate the Distributed Marketing system tables

Important: This step is required only if you selected the manual database setup when you ran the installer, or if the automatic database setup failed during installation.

You must create the Distributed Marketing system tables in the system table database, and populate them with required data.

1. Open the *<Distributed_Marketing_home>*/tools/bin/setenv.bat or setenv.sh file in a text editor.
2. Set the JAVA_HOME and DBDRIVER_CLASSPATH parameters if they have not already been set.
3. Run the udmdbsetup.bat or udmdbsetup.sh file, located in the *<Distributed_Marketing_home>*/tools/bin directory. Follow the instructions for the type of installation you are performing: new installation, reinstallation, or upgrade.

If this is a new installation or a reinstallation:

Run udmdbsetup using the full installation parameter. Use the correct parameter values for your locale and installation type.The following example creates and populates the Distributed Marketing system tables for a new installation on Windows in the en_US locale:

```
udbmdbsetup.bat -Len_US -tfull -v
```

If this is an upgrade installation:

Run udmdbsetup using the upgrade parameter. Use the correct parameter values for your locale, installation type, and the version you are upgrading from. The following example creates and populates the Distributed Marketing system tables for an upgrade from version 8.2 on UNIX in the fr_FR locale:

```
udmdbsetup.sh -b8.2 -Lfr_FR -tupgrade -v
```

Step: Register Distributed Marketing manually, if necessary

If the Distributed Marketing installer could not connect with the Marketing Platform system table database during the installation process, you see an error message that notifies you of this failure. The installation process will proceed, but in this case you must import the Distributed Marketing information into the Marketing Platform system tables manually.

The `configTool` utility is located in the `tools/bin` directory under your Marketing Platform installation. For detailed instructions on using the `configTool` utility, see "The configTool utility," on page 43.

Run the `configTool` utility, using the following example commands as guidelines. This imports configuration properties and menu items. Note that you run the utility as many times as there are files.

```
configTool.bat -v -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f
"%NAVIGATION_DIR%\DistributedMarketing_navigation_analytics.xml"

configTool.bat -v -i -p "Affinium|suite|uiNavigation|alerts" -f
"%NAVIGATION_DIR%\DistributedMarketing_alert.xml"

configTool -r Collaborate -f
"full_path_to_DistributedMarketing_installation_directory\conf\
DistributedMarketing_configuration.xml"

configTool -v -i -p "Affinium|suite|uiNavigation|mainMenu" -f
"full_path_to_DistributedMarketing_installation_directory\conf\
DistributedMarketing_navigation.xml"

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

Post-upgrade steps

After completing the upgrade, you must perform the following steps.

1. Deploy `collaborate.war` in the Web server if you have not done so.
2. In **Platform > Configuration**, edit the property **Distributed Marketing > UDM Configuration Settings > Templates >** `defaultListTableDSName` to set the applicable datasource name.
3. Edit `listmanager_tables.xml` to add additional datasources if you plan to use multiple datasources.

   For example:

   ```
   <Datasource Name="ACC_DEMO" Type="SQLSERVER" DecimalSeparator="."/>
   <Datasource Name="ACC_DEMO4" Type="SQLSERVER" DecimalSeparator="."/>
   ```
4. Restart the Web server.
5. Open **Settings > Distributed Marketing settings > Template Configuration > Templates**.
6. Open the Campaign tab of each Corporate Campaign template and update the **IBM Unica Campaign Service URL** to `http://`*`server:port`*`/Campaign/services/CampaignServices30Service`
7. Open **Settings > Configuration > Campaign > Collaborate**.

8. For **CollaborateIntegrationServicesURL**, click **Edit Settings**.
9. Change `http://server:port/collaborate/services/CollaborateIntegrationServices/1.0` to `http://server:port/collaborate/services/CollaborateIntegrationServices1.0`.
10. Restart the Web server.

Appendix. 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/or duplicate using the Configuration page.
- To register (import configuration properties for) IBM Unica Marketing products, if the product installer is unable to add the properties to the database automatically.
- To export an XML version of configuration settings for backup or to import into a different installation of IBM Unica Marketing.
- To delete categories that do not have the **Delete Category** link. You do this by using `configTool` to export your configuration, then manually deleting the XML that creates the category, and using `configTool` to import the edited XML.

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

Valid product names

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

Product name	Name used in configTool
Marketing Platform	`Manager`
Campaign	`Campaign`
Distributed Marketing	`Collaborate`
eMessage	`emessage`
Interact	`interact`
Optimize	`Optimize`
Marketing Operations	`Plan`
CustomerInsight	`Insight`
NetInsight	`NetInsight`
PredictiveInsight	`Model`
Leads	`Leads`

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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 quotes.

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 quotes.

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 parenthesis in the right pane. Delimit a path in the configuration property hierarchy using the | character, and surround the path with double quotes.

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

-r *productName* -f *registrationFile*

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

Note the following.

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

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

-u *productName*

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

Options

-o

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

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

Examples

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

  ```
  configTool -i -p "Affinium" -f Product_config.xml
  ```

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

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

- Export all configuration settings to a file named `myConfig.xml` located in the `D:\backups` directory.

  ```
  configTool -x -f D:\backups\myConfig.xml
  ```

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

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

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

  ```
  configTool -r product Name -f app_config.xml -o
  ```

- Unregister an application named productName.

  ```
  configTool -u productName
  ```

Contacting IBM Unica technical support

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

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

Information to gather

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

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

System information

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

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

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

Contact information for IBM Unica technical support

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

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