IBM Unica Interact
Version 8 Release 6
May 25, 2012

Installation Guide
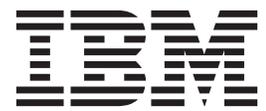
IBM

Contents

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.

Interact basic installation checklist

This section provides a summarized, high-level overview of the steps required to perform a basic installation of Interact. Each of the steps listed here is explained in more detail elsewhere in this documentation, as indicated.

Prepare data sources

1. "Step: Create databases or schemas" on page 7

   Work with a database administrator to create the databases or schemas for the Interact runtime and design time system tables.

2. "Step: Create the ODBC or native connections on the Campaign machine" on page 8

   If necessary, create the ODBC or native connections to the database that holds the design environment test run tables.

3. "Step: Configure the web application servers for your JDBC drivers" on page 8

   Add the database drivers to the classpath of the web application servers where the design time and runtime components are installed.

4. "Step: Create JDBC connections in the web application server" on page 9

   Create JDBC connections to the Interact, Campaign, and Marketing Platform system tables, using the required and recommended JNDI names.

Install IBM Unica Interact

1. Chapter 3, "Step: Obtain the IBM Unica installers," on page 15

   Download or locate the media containing the IBM Unica , Interact, and Interact report package installers.

2. "Information required to install all IBM Unica Marketing products" on page 21

   Gather the required database and web application server information.

3. "Step: Run the IBM Unica installer" on page 21

   With the Marketing Platform installed, install the Interact components.

Configure IBM Unica Interact before deployment

1. "Step: Create and populate the Interact system tables" on page 25

   Use the provided SQL scripts to create and populate the Interact design time and runtime system tables.

2. "Step: Register Interact manually, if necessary" on page 29

If the installer was unable to register IBM Unica Interact, use Marketing Platform utilities to register manually.

Deploy IBM Unica Interact

1. Chapter 5, "Step: Deploy IBM Unica Interact," on page 35

   Follow the deployment guidelines to deploy the Interact runtime component (the design time component is deployed when Campaign is deployed).

Configure IBM Unica Interact after deployment

1. "Step: Create the Interact system users" on page 42

   Set up system users to access the runtime and design environments.

2. "Steps: Set Interact configuration properties" on page 39

   Set the required database properties to configure the design and runtime environments on the Settings > Configuration page.

3. "Step: Verify your Interact installation" on page 44

   Log in to Campaign to verify the design environment, and access the runtime URL provided in this guide to verify the runtime environment.

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.
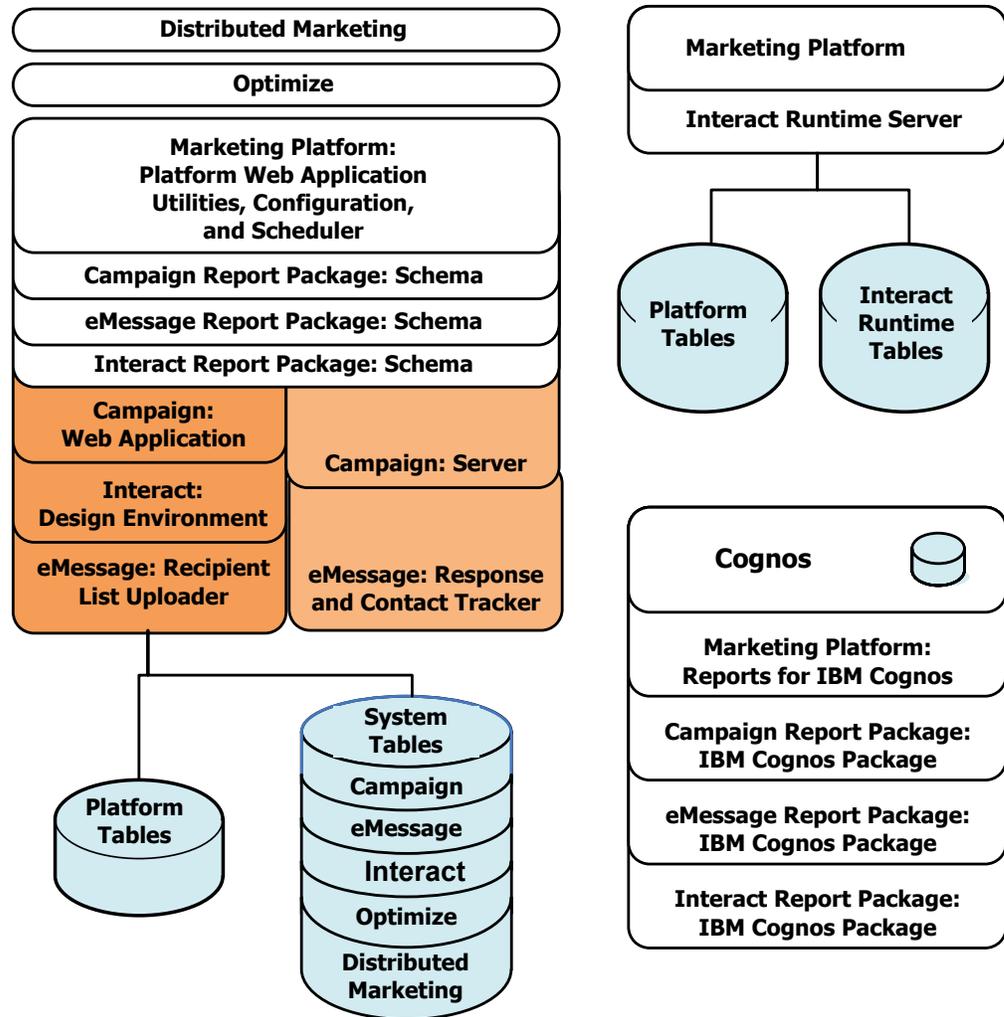
Basic installation of Interact

Interact is a member of the Campaign family of applications and has two components you must install, the design environment and the runtime environment.

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

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

The instructions in this guide are designed to enable you to successfully perform a basic installation of Interact. Basic installation is a necessary step, but it is not the end of the installation process. Interact typically requires additional configuration steps to prepare for use in achieving your business objectives.

IBM defines a basic installation as follows.

- All components of the product are installed.
- A system user is configured for the design environment, with administrator-level access to the Campaign system tables.
- A system user is configured for the runtime environment.

You can find information about advanced configurations as shown in the following table.

Topic	Guide
Customizing Unica reporting schemas and sample reports	The *IBM Unica Marketing Platform Administrator's Guide* and the *IBM Unica Interact Administrator's Guide*
Configuring use of non-ASCII data or non-US locales	*IBM Unica Campaign Administrator's Guide*
Configuring use of multiple languages and locales	*IBM Unica Campaign Administrator's Guide*
Integrating with LDAP and web access control systems	*IBM Unica Marketing Platform Administrator's Guide*
Configuring SSL	*IBM Unica Marketing Platform Administrator's Guide*

Prerequisites

The following are prerequisites for installing IBM Unica Marketing products.

System requirements

For detailed system requirements, see the *Recommended Software Environments and Minimum System Requirements* guide for the IBM Unica Marketing products you plan to install.

Java Virtual Machine (JVM) requirements

Some IBM Unica Marketing applications within a suite must be deployed on a dedicated Java Virtual Machine (JVM). Some IBM Unica Marketing products require customized JVM settings. If you encounter JVM-related errors, you may need to create a WebLogic or WebSphere® domain dedicated to IBM Unica Marketing products.

For performance reasons, however, you should have a dedicated JVM for each Interact runtime.

Network domain requirement

IBM 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.

IBM Unica Marketing Platform requirement

Before you install any IBM Unica Marketing products, the Marketing Platform must be fully installed and deployed, so that the products you install can register their configuration properties and security roles, and you can set values for configuration properties on the Marketing Platform Configuration page.

In general, for each group of products that you plan to have work together, you need to install the Marketing Platform only once. However, for Interact, the best practice is for each production Interact server group have its own installation of Marketing Platform.

IBM Unica Campaign requirement

You must install Campaign before you install any of the following Campaign-family products that depend on it: Interact, Optimize, Distributed Marketing, and eMessage.

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`).

If you are upgrading or configuring multiple partitions

If you are upgrading, see the sections on preparing to upgrade.

If you plan to create multiple partitions, see the section on configuring multiple partitions.

Chapter 2. About preparing the IBM Unica Interact data sources

You must set up the required data sources and JDBC connections for Interact. You will need the details about the system table databases later in the installation process, so you should print and fill in the "IBM Unica Interact database information checklist" on page 12 as you perform the steps in this section.

Step: Create databases or schemas

1. Work with a database administrator to create the required databases or schemas for Interact.

    Be sure to see the remainder of this section before you start to create the schemas. It provides information on the databases or schemas you must create.

2. For each of the required databases or schemas have the database administrator create an account that you will specify 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 databases or schemas and database accounts and then print and add the information to the "IBM Unica Interact database information checklist" on page 12. You will use this information later in the installation process.

Required databases or schemas for Interact

Use this section to determine how many databases or schemas you must create. Interact design environment requires additional tables that are not listed here because they are added to the database or schema that holds the Campaign system tables.

Interact runtime environment can require several databases. The following list provides a brief summary.
*   Create a database or schema to hold the Interact Runtime tables. Every server group should have separate database or schema.
*   Create a database, schema, or view to hold the user Profile tables. The user profile tables could be in the same database as your Campaign Customer (user) tables. You may want a separate set of user profile tables for each interactive channel.
*   Create a database, schema, or view to hold the Test run tables. The Test run tables could be in the same database as your Campaign Customer (user) tables.
*   If you are using built-in learning, create a database or schema to hold the Learning tables.
*   If you are using cross-session response tracking, create a database or schema to hold a copy of the Campaign Contact History tables. Alternatively, instead of creating a copy you could use the actual Campaign Contact History tables.

Step: Create the ODBC or native connections on the Campaign machine

The machine on which the Campaign server is installed must be able to communicate with the database that holds the Interact design environment test run tables. These tables may be the same as your customer (user) tables. If so, the connection will already have been created when Campaign was installed.

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

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

Record the connection names in the "IBM Unica Interact database information checklist" on page 12

Step: Configure the web application servers for your JDBC drivers

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

Important: Perform this procedure for every web application server where you plan to deploy your IBM Unica Marketing products.

1. Obtain the latest vendor-provided Type 4 JDBC drivers supported by IBM Unica Marketing. See the reference table or tables in this section for details.
   - If the drivers do not exist on the machine where the product is installed, obtain them and copy them to the machine or machines where you plan to deploy IBM Unica Marketing web applications. You may copy them to any location on the machine where you plan to deploy the IBM Unica Marketing product. To avoid potential path issues, unpack the drivers in a path that does not include spaces.
   - If you obtain the drivers from a machine where the data source client is installed, verify that the version is the latest supported by IBM Unica Marketing.

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

Database type	File(s)
Oracle 9g and 10g	ojdbc14.jar
Oracle 11	ojdbc5.jar For WebLogic 10g R3, Weblogic 11gR1, and WebSphere 7.0 with JDK 1.6 - use ojdbc6.jar
DB2®	db2jcc.jar db2jcc_license_cu.jar - not present in V9.5 or V9.7

Database type	File(s)
SQL Server	You must use version 1.2 or above of the SQL Server driver `sqljdbc.jar` WebLogic 10g R3, WebLogic 11gR1, and WebSphere 7.0 with JDK 1.6 - use `sqljdbc4.jar` For SQL Server 2005 on Windows 2008, you must use version 2.0 of the SQL Server driver sqljdbc.jar. For all other platforms, you must use version 1.2 of the SQL Server driver sqljdbc.jar.

2. Include the full path to the drivers 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 JDBC connections in the web application server

You must create JDBC connections in each of the web application servers on which Campaign and Interact will be deployed as listed in the following table.

The list also provides the recommended JNDI names. Using these names simplifies configuration, as they match the default values of configuration properties that refer to these connections.

Deployed web application	JDBC connections are required to these databases
Campaign	In the web application server where Campaign is deployed, create JDBC connections to the databases that hold the following tables. • Interact runtime tables JNDI name: `InteractRTDS` • Interact test run tables (which may be the same as the Customer (User) tables) JNDI name: `testRunDataSource`

Deployed web application	JDBC connections are required to these databases

Interact runtime
 	
(This is typically deployed in a different JVM from Campaign)
	In the web application server where Interact runtime is deployed, create JDBC connections to the databases that hold the following tables. Note that all JNDI names are recommended, unless otherwise indicated.
	• Interact runtime tables
	  JNDI name: `InteractRTDS`
	• Interact profile tables
	  JNDI name: `prodUserDataSource`
	• Interact test run tables (required for test run server group only)
	  JNDI name: `testRunDataSource`
	• Interact learning tables (if you are using built-in learning)
	  JNDI name: `InteractLearningDS`
	• Campaign contact and response history tables (if you are using cross-session response tracking)
	  Jndi name: `contactAndResponseHistoryDataSource`
	• Marketing Platform system tables
	  JNDI name: `UnicaPlatformDS`
	  Important: This is the required JNDI name for connections to the Platform system table database.
	
	  You must set up this JDBC connection only if you are installing the Interact runtime in a web application server where Marketing Platform is not currently deployed. If Marketing Platform is deployed in the same web application server, this JDBC connection is already defined.

Record the JNDI names that you used in the "IBM Unica Interact database information checklist" on page 12.

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>`

IBM Unica Interact database information checklist

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

Runtime tables

You may have multiple databases containing runtime tables. Enter the information for each runtime environment.

Database schema 1	
JNDI name 1	
Database schema 2	
JNDI name 2	
Database schema 3	
JNDI name 3	

Contact response history tables

Used only when cross-session tracking is being implemented. These may be the same as your Campaign contact response history tables, or they may be in a different database server or schema.

Database schema	
JNDI name	

Learning tables

These are optional.

Database schema	
JNDI name	

User profile tables

These may be in your customer (user) tables.

Database schema	
JNDI name	

Test run tables

These may be in your customer (user) tables.

Database schema	
DSN (ODBC or native connection name)	

JNDI name	

Chapter 3. Step: Obtain the IBM Unica installers

Obtain the DVD, or download the software from IBM.

- The IBM Unica installer
- The Interact installer

If you plan to use the IBM Unica reporting feature, see the *IBM Unica Marketing Platform Installation Guide* for instructions on how to install it.

This installation guide assumes you have already installed and configured Campaign for the design environment and at least one instance of Marketing Platform for each runtime environment.

Setting permissions on UNIX-type systems

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

Choosing the right installer file

The IBM 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. If different installers exist for 32- and 64-bit operating systems, these numbers are also included in the file name. If no bit number is included, the installer is for both 32-bit and 64-bit operating systems.

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

If you plan to install on Windows using either GUI or console mode — `ProductN.N.N.N_win.exe` is version `N.N.N.N` and is intended for installation on the Windows 32-bit or 64-bit operating systems.

If you plan to install on Solaris using 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.

If you plan to install on UNIX using 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" on page 16.

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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.

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.

Installing the products

This section describes how to install IBM Unica Marketing products.

Choosing product installation directories

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

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

If the directory you specify does not exist, the installer creates it, assuming that the user performing the installation has appropriate permissions.

The default top-level directory for IBM Unica installations is named `IBM/Unica`. The product installers then install in subdirectories under the `Unica` directory.

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 IBM Unica Interact components

The Interact design environment must be installed with Campaign. For best performance, IBM recommends that you install a runtime server on its own machine, where no other IBM Unica Marketing products are installed.

Important: You must fully install and deploy a Marketing Platform for each server group. If you install multiple Interact server groups, you must fully install and deploy the Marketing Platform in each runtime server group.

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

Component	Description
Interact Runtime Environment	The Interact runtime server. You integrate Interact runtime servers with a touchpoint, such as a web site, to present offers based on real-time data. You can install multiple runtime servers in your environment and organize them into server groups. Each server group must have one instance of the Marketing Platform separate from the Marketing Platform for Campaign and separate from other server groups.
Interact Design Environment	The design environment for Interact. You must install the design environment on the same machine as Campaign. You must install only one design environment.

Where to install IBM Unica Interact Report Package components

The reports package for Interact contains two installation components, as follows.
- Install the reporting schemas on the Marketing Platform system.
- Install the IBM Cognos® package on the IBM Cognos system.

The following table describes the components you can select when you install the reports package for Interact.

Component	Description
IBM Unica Interact reporting schemas (to be installed on the IBM Unica Marketing system)	The Interact reporting schemas make interactive channel-based campaign, offer, and cell data from all three Interact data sources available for reporting.
IBM Cognos package for IBM Unica Interact (to be installed on the IBM Cognos system)	The IBM Cognos package includes a reporting metadata model for the Interact database tables and a set of example reports that you can use to track campaign, offer, and cell performance.

About multiple Interact runtime servers

All Interact runtime servers in a single server group must use the same schema for runtime tables, profile tables, and learning tables.

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

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

Although not required, you can also install a unique instance of Marketing Platform for each Interact runtime server, or a few instances of Marketing Platform supporting subsets of runtime servers. For example, if your server group contains 15 runtime servers, 5 runtime servers can report to one instance of Marketing Platform, for a total of 3 instances of Marketing Platform.

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

If you are installing a test environment and have multiple Interact runtime servers on the same machine:

- Each Interact runtime server instance must be in a separate web application instance.

- If you are configuring JMX monitoring for Interact servers running on the same machine, you must configure each Interact runtime server's JMX monitoring to use a different port and instance name. Edit the `JAVA_OPTIONS` in your web application server startup script and add the following options.

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."

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 17.

Navigating in the installation wizards

When the installer runs in GUI mode, you navigate using the **Next**, **Previous**, **Cancel**, and **Done** buttons.

When the installer runs in console mode, you navigate by entering numbers that correspond to the buttons in GUI mode, as described in the help text on each screen of the wizard. In console mode, an additional redisplay command is available.

In console mode, a number or letter is displayed in square brackets at the end of the prompt line; this is the default command issued if you press **Enter** without typing anything. You can type **back** to go to a previous screen, or `quit` to cancel the installation.

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**.

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.

Chapter 4. About pre-deployment configuration of IBM Unica Interact

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

Neither the design environment or the runtime environment has pre-deployment configuration tasks.

Step: Create and populate the Interact system tables

Use your database client to run the Interact SQL scripts against the appropriate database or schema to create and populate the Interact runtime environment; design environment; learning; user profile; and contact and response tracking data sources.

Design environment tables

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

The following tables list the SQL scripts you can use to manually create and populate the design environment tables.

The SQL scripts are located in the `Interact/interactDT/ddl` directory under your Interact design environment installation.

If your Campaign system tables are configured for unicode, use the appropriate script located in the `Interact/interactDT/ddl/unicode` directory under your Interact design environment installation. There are no Unicode equivalent scripts for the `aci_populate_systab` scripts used to populate the design environment tables.

Table 1. Scripts for creating design time tables

Data source type	Script name
IBM DB2	aci_systab_db2.sql The user tablespace and system temporary tablespace where the Campaign system tables reside must each have a page size of 16K or greater.
Microsoft SQL Server	aci_systab_sqlsvr.sql
Oracle	aci_systab_ora.sql

Table 2. Scripts for populating design-time tables

Data source type	Script name
IBM DB2	aci_populate_systab_db2.sql
Microsoft SQL Server	aci_populate_systab_sqlsvr.sql
Oracle	aci_populate_systab_ora.sql

Runtime environment tables

The following tables list the SQL scripts you can use to create and populate the Interact runtime tables.

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

If your Interact runtime tables are configured for Unicode, use the appropriate script located in the `ddl/Unicode` directory to create the runtime tables. There are no Unicode equivalent scripts for the `aci_populate_runtab` scripts used to populate the runtime tables.

You must run these scripts once per server group data source.

Table 3. Scripts for creating runtime environment tables

Data source type	Script name
IBM DB2	aci_runtab_db2.sql The user tablespace and system temporary tablespace where the Interact runtime environment tables reside must each have a page size of 16K or greater.
Microsoft SQL Server	aci_runtab_sqlsvr.sql
Oracle	aci_runtab_ora.sql

Table 4. Scripts for populating runtime environment tables

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

Tables for optional features

The following tables list the SQL scripts you can use to create and populate tables for Interact features including learning, global offers, score override, and contact and response history tracking.

Learning

All of these SQL scripts are located in the `ddl` directory under your Interact installation.

Note: The built-in learning module requires a separate data source from the Interact runtime environment tables. If you are using the built-in learning module, you must create a data source to hold all of the learning data. This separate data source can communicate with all server groups. This means you can learn from your different touchpoints at the same time.

If your Interact runtime tables are configured for Unicode, use the appropriate script located in the `ddl/Unicode directory` under your Interact installation to create the learning tables.

Table 5. Learning table scripts

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

Contact and response history

The following tables list the SQL scripts you must run against the contact history tables if you are using cross-session response tracking or the advanced learning feature.

All of the SQL scripts are located in directories specified under your Interact installation.

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

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

Table 6. Contact history table scripts

Data source type	Script name

IBM DB2	`<Interact_HOME>/ddl/aci_crhtab_db2.sql`
	
	`<Interact_HOME>/interactDT/ddl/acifeatures/`
	`aci_lrnfeature_db2.sql`

Microsoft SQL Server	`<Interact_HOME>/ddl/aci_crhtab_sqlsvr.sql`
	
	`<Interact_HOME>/interactDT/ddl/aci_lrnfeature_sqlsvr.sql`

Oracle	`<Interact_HOME>/ddl/aci_crhtab_ora.sql`
	
	`<Interact_HOME>/interactDT/ddl/aci_lrnfeature_ora.sql`

Step: Create the Interact user profile tables

Some optional features in Interact, such as global offers, offer suppression, and score override, require specific tables in your user profile databases. Refer to the *IBM Unica Interact Administrator's Guide* for details about the profile database, and the role that the offer suppression, global offers, and score override tables play in offer serving.

Use your database client to run the appropriate SQL scripts against the appropriate database or schema and create these required user tables. If you have more than one audience level defined, you need to create one of each required table for each audience level.

User profile tables

The following table lists the SQL scripts you must use to create the following optional profile tables:

- Global offers table (UACI_DefaultOffers)
- Offer suppression table (UACI_BlackList)
- Score override table (UACI_ScoreOverride)

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

You must run these scripts once per audience level. Modify the script for each different audience level (after the first) and rename the profile tables created after running the scripts.

Table 7. Scripts for creating user profile tables

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

Advanced scoring (optional)

The following tables list the SQL scripts you must run if you are using the advanced scoring feature to override the Interact learning algorithm.

All of the SQL scripts are located in the ddl/acifeatures directory under your Interact installation.

If your scoring tables are configured for Unicode, use the appropriate script located in the ddl/acifeatures/Unicode directory under your Interact installation to create the learning tables.

Note that these scripts are intended to be run against the User Profile database.

Table 8. Scoring table scripts

Data source type	Script name
IBM DB2	aci_scoringfeature_db2.sql
Microsoft SQL Server	aci_scoringfeature_sqlsvr.sql
Oracle	aci_scoringfeature_ora.sql

Step: Register Interact manually, if necessary

If the Interact installer could not connect with the Marketing Platform system tables during the installation process, an error message appears that notifies you of this failure. The installation process will proceed, but if you see the error message, you must import the Interact information into the Marketing Platform system tables manually after the installer closes. Follow the directions for each product as shown in this section.

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

To register IBM Unica Interact design environment manually

If the Interact installer cannot connect to the Marketing Platform database to register the product, run the `configTool` utility, using the following example commands as guidelines. This imports menu items and sets configuration properties. Note that you run the utility as many times as there are files. Because there is one file, you must run the utility one time.

```
configTool  -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign"
 -f "full_path_to_Interact_DT_installation_directory\interactDT\
 conf\interact_navigation.xml"
```

```
configTool -v -i -o -p Affinium|Campaign|about
 -f "full_path_to_Interact_DT_installation_directory\interactDT\
 conf\interact_subcomponent_version.xml"
```

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

For detailed instructions on using the `configTool` utility, see "The configTool utility" on page 30 in the *IBM Unica Marketing Platform Installation Guide*.

You may need to manually enable Interact by setting the `Campaign > partitions > partition[n] > server > Internal > interactInstalled` configuration property to **yes**.

To register IBM Unica Interact runtime environment manually

If the Interact installer cannot connect to the Marketing Platform database to register the product, run the `configTool` utility, using the following example commands as guidelines. This imports configuration properties. Note that you run the utility as many times as there are files. Because there is one file, you must run the utility one time.

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

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

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

For detailed instructions on using the `configTool` utility, see "The configTool utility" in the *IBM Unica Marketing Platform Installation Guide*.

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

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`

Chapter 5. Step: Deploy IBM Unica Interact

Follow the guidelines in this topic for deploying the Interact design environment and runtime servers.

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.

Deploying the design environment

When you ran the IBM Unica installer, you may have included Interact in an EAR file, or you may choose to deploy the Interact 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.

After you have installed Interact, the design environment is deployed automatically when you deploy Campaign. After you deploy the Campaign.war file, there are some configuration procedures that will enable the design environment in Campaign. Note that the Campaign.war file is located in the Campaign installation directory.

Deploying the runtime server

You must deploy the Interact runtime server for every instance of the runtime server you install. For example, if your performance requirements require six instances of a runtime server, you must install and deploy Interact runtime six times. You can deploy the runtime server on the same server as the design environment, or on a separate server. InteractRT.war is located in the Interact installation directory.

Note: When you deploy the Interact runtime, you must change the context root from InteractRT to interact.

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**.

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.

IBM WebSphere Application Server V7.0 requires fixpack 7.0.0.17 or higher

If you plan to use the IBM WebSphere Application Server V7.0 to deploy any IBM Unica Marketing products, you must apply Fix Pack 17 (also referred to as Version 7.0.0.17) or higher to address a security issue. This applies to all WebSphere Application Server 7.0 packages, including the version that is bundled with some IBM Unica Marketing products.

You can obtain Fix Pack 17 or higher here:

http://www-01.ibm.com/support/docview.wss?rs=180&uid=swg27013594.

Note that on that page, you must select the correct Fix Pack before you download.

For additional information about supported WebSphere versions for deploying IBM Unica Marketing products, see the *Recommended Software Environments and Minimum System Requirements* document for each product.

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 of Interact

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

In addition, if you are using the IBM Unica Marketing reporting feature, you must install the reports packs for Interact as described in the *Marketing Platform Installation Guide*.

Steps: Set Interact configuration properties

This section describes the minimum configuration properties you must set on the Configuration page for a basic installation of Interact.

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

You must set these required properties as described in this section.

The Interact runtime environment
- "Step: Configure Interact runtime environment properties"
- "Step: Configure multiple Interact runtime servers" on page 40

The Interact design environment
1. "Step: Configure the Test Run data source" on page 40.
2. "Step: Add server groups" on page 41
3. "Step: Select a server group for interactive flowchart test run" on page 41
4. "Step: Configure the contact and response history module" on page 42

Step: Configure Interact runtime environment properties

The following properties must be set for basic Interact runtime operation. There are other properties you can configure later to tune your performance.

You must configure these properties for every server group.
- Data source for the profile tables for the runtime environment.
- Data source for the runtime environment system tables.
- Data source for the test run tables.
- Data source for built-in learning tables. These properties are required only if you are using built-in learning.
- Data source of the contact and response history tables for cross-session response tracking. These properties are required only if you are using cross-session response tracking.
- `Interact > profile > Audience Levels`

  These categories must match the audience levels you have defined for Campaign, however you only need to configure the audience levels used in interactive flowcharts.

Step: Configure multiple Interact runtime servers

If possible, you should configure your server groups to work with a load balancer with persistent (sticky) sessions enabled. If this is not possible, you must create some method of selecting runtime servers from a server group when working with the Interact API.

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

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

1. Install additional Interact runtime servers as described in this guide.

   When installing multiple runtime servers, you must remove network connectivity for the Interact Run Time machine before running the installer, so that additional Interact installations do not overwrite the Marketing Platform configuration.

   After installing all instances of the Interact Run Time server, restart Marketing Platform.

2. To enable a distributed cache, when configuring the configuration properties, also configure the following properties:

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

Note: When uninstalling an Interact server from a server group, you must follow special instructions to be sure that you do not accidentally remove all IBM Unica Marketing configuration.

Step: Configure the Test Run data source

Interactive flowcharts require a connection to the Interact test run tables by adding the Interact test run tables as a Campaign data source. To add an additional Campaign data source, add a new category to `Campaign > partitions > partitionN > datasources` as described in the *IBM Unica Campaign Installation Guide*.

Use the `OwnerForTableDisplay` property to define a database schema to limit the tables displayed when mapping tables in an interactive channel.

The test run data source used in the Interact design time should specify the JNDI name of the design time test run tables.

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

If you are using a SQL Server database and you are setting your locale to Japanese or Korean, you must configure the following properties in your test run data source.

- **Campaign > partitions > partition*N* > datasources > *testRunDataSource* > ODBCUnicode** — `UCS-2`
- **Campaign > partitions > partition*N* > datasources > *testRunDataSource* > stringEncoding** — `WIDEUTF-8`

Step: Add server groups

You must define the locations of the Interact runtime servers on the Configurations page in the Marketing Platform for the design environment to access them for deployment and performing test runs of Interactive flowcharts.

You must create at least one server group, and the server group must contain at least one Interact runtime server, defined by the instance URL. You may have multiple server groups, for example, one to Interact with your web site, one to Interact with your call center, and one for testing. Each server group can contain multiple instance URLs, each instance URL representing one instance of Interact runtime.

Important: Each Interact runtime can be associated with one design time only.

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

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

Create these server groups using the **Campaign > partitions > partition*n* > Interact > serverGroups > *(serverGroup)*** configuration property template. The category name is only used for organizational purposes, however, you can use the same name for the category as for the `serverGroupName` property to avoid confusion.

Step: Select a server group for interactive flowchart test run

Interactive flowcharts require an instance of the Interact runtime to run. You cannot use the Campaign batch flowchart engine to run an interactive flowchart. You must define a server group for Campaign to reference for performing test runs of interactive flowcharts.

Set the following configuration properties to configure interactive flowchart test run. This server group is also used for validating table mapping for the interactive channel, and checking the syntax of user macros in interactive flowcharts.

- `Campaign > partitions > partitionN > Interact > flowchart > serverGroup`
- `Campaign > partitions > partitionN > Interact > flowchart > dataSource`

Note that the data source you specify for the `dataSource` property must be a Campaign data source.

Step: Configure the contact and response history module

The Interact runtime servers store contact and response history in staging tables. To make this data available for reporting and use with Campaign, you must configure the contact and response history module to copy the data from the Interact runtime servers to the Campaign contact and response history tables.

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

1. Confirm that you have added the Interact runtime databases to the web application server hosting Campaign.
2. Add a runtime data source using the `Campaign > partitions > partition`N `>` `Interact > contactAndResponseHistTracking > runtimeDataSources >` `(runtimeDataSource)` configuration property template.
3. Repeat these steps for each Interact runtime server group from which you want to collect contact and response history data.

Step: Create the Interact system users

Interact requires you to configure two sets of users, runtime environment users and design environment users.

- **Runtime environment users** are IBM Unica user accounts configured to work with the Interact runtime servers. This user is required to send Interact configuration data from the design environment to the runtime environment and when using JMX monitoring with the JMXMP protocol.
- **Design environment users** are Campaign users. Configure the security for the various members of your design team as described in the *Campaign Administrator's Guide*.

Runtime environment user

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

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

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

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

Design environment users

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

You should configure a Interact design environment user to have all the permissions of a Campaign user to edit flowcharts and the permissions listed in the following table.

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

Category	Permissions
Campaigns	• View Campaign Interaction Strategies — Ability to see but not edit interaction strategy tabs in a campaign. • Edit Campaign Interaction Strategies — Ability to make changes to interaction strategy tabs, including treatment rules. • Delete Campaign Interaction Strategies — Ability to remove interaction strategy tabs from campaigns. Deletion of an interaction strategy tab is restricted if the interactive channel to which it has been assigned has been deployed. • Add Campaign Interaction Strategies — Ability to create new interaction strategy tabs in a campaign. • Initiate Campaign Interaction Strategy Deployments — Ability to mark an interaction strategy tab for deployment or undeployment.
Interactive Channels	• Deploy Interactive Channels — Ability to deploy an interactive channel to Interact runtime environments. • Edit Interactive Channels — Ability to make changes to interactive channels. • Delete Interactive Channels — Ability to remove interactive channels. Deletion of interactive channels is restricted if the interactive channel has been deployed. • View Interactive Channels — Ability to see but not edit interactive channels. • Add Interactive Channels — Ability to create new interactive channels. • View Interactive Channel Reports — Ability to see the analysis tab of the interactive channel. • Add Interactive Channel Child Objects — Ability to add interaction points, zones, events, and categories.

Category	Permissions
Sessions	• View Interactive Flowcharts — Ability to see an interactive flowchart in a session. • Add Interactive Flowcharts — Ability to create new interactive flowcharts in a session. • Edit Interactive Flowcharts — Ability to make changes to interactive flowcharts. • Delete Interactive Flowcharts — Ability to remove interactive flowcharts. Deletion of interactive flowcharts is restricted if the interactive channel to which this interactive flowchart is assigned has been deployed. • Copy Interactive Flowcharts — Ability to copy interactive flowcharts. • Test Run Interactive Flowcharts — Ability to initiate a test run of an interactive flowchart. • Review Interactive Flowcharts — Ability to see an interactive flowchart and open processes to view settings, but unable to make changes. • Deploy Interactive Flowcharts — Ability to mark an interactive flowcharts for deployment or undeployment.

If you have Interact installed and configured, the following additional options are available for the default Global Policy and new policies. Remember that some Interact users also require some Campaign permissions such as Custom Macros.

Step: Verify your Interact installation

To verify that the Interact design environment is installed, log into the IBM Unica Marketing and confirm you can access **Campaign > Interactive Channels**.

To verify that a Interact runtime environment is correctly installed, use the following procedure.

1. Access the Interact runtime URL using Internet Explorer.

   The URL is:

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

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

2. Click **Interact Initialization Status**.

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

`System initialized with no errors!`

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

Chapter 7. About partitions

In the Campaign family of products, partitions provide a way to secure the data associated with different groups of users.

When you configure Campaign or a related IBM Unica Marketing application to operate with multiple partitions, each partition appears to application users as a separate instance of the application. There is no indication that other partitions exist on the same system.

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

Setting up multiple partitions for Interact

You can configure Interact to work with multiple partitions, as described in the following sections.

Runtime environments

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

Design time environments

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

If you set up multiple partitions with Campaign, you are setting up multiple partitions for Interact. You must configure each partition to communicate with a separate Interact runtime environment, including separate Marketing Platform and runtime tables, for each design time partition, as shown in the following diagram.
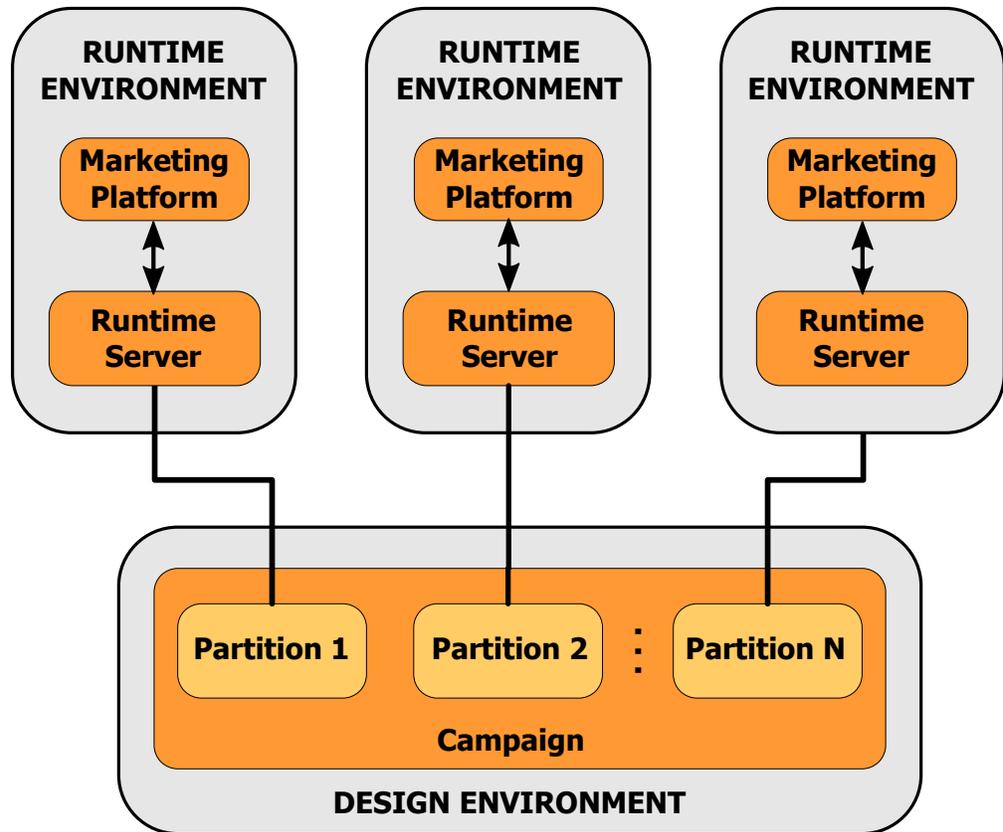
You must manually enable Interact for the partition by setting the `Campaign > partitions > partition`*N*` > server > internal > interactInstalled` configuration property to `yes`.

For each partition, you must perform the Design Time configuration steps listed in "Steps: Set Interact configuration properties" on page 39 in the "Configuring Unica Interact After Deployment" chapter.

Chapter 8. Upgrade prerequisites for all IBM Unica Marketing products

To upgrade any IBM Unica Marketing product, you must meet all of the prerequisites listed under "Prerequisites" on page 4 in the "Preparing to Install" chapter.

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

Remove response files generated by previous installations

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

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

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

The response files are named installer_*product*.properties, except for the file for the IBM Unica installer itself, which is named installer.properties. The installer creates these files in the directory where the installer is located.

User account requirement (UNIX only)

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

32-bit to 64-bit version upgrades

If you are moving from a 32-bit to a 64-bit version of an IBM Unica Marketing product, ensure that the following conditions are met.
- The database client libraries for your product data sources are also 64-bit
- All relevant library paths (for example, startup or environment scripts) correctly reference the 64-bit versions of your database drivers

Knowledge requirements

These instructions assume that the person performing the upgrade has an understanding of the following.
- The basic function of the IBM Unica installer, as described in "How the IBM Unica Marketing installers work" on page 16
- General IBM Unica Marketing product functionality and components, including the structure of the file system
- The installation and configuration process for the source product version and for the new version
- Maintaining configuration properties in your source and target systems
- The installation and configuration process for reports, if you are using these reports

Order of upgrading

The same considerations described in "IBM Unica Marketing Platform requirement" on page 4 apply when you upgrade with one exception.

A Interact 8.x runtime can run an Interact 7.x deployment; therefore you should upgrade your runtime environments before your design environment.

Also be aware that you must succesfully upgrade Marketing Platform prior to or at the same time as the upgrade of any other IBM Unica Marketing product. You cannot upgrade any IBM Unica Marketing products without also upgrading Marketing Platform to the compatible release.

Interact upgrade scenarios

Follow these guidelines for upgrading to the new version of Interact.

Source version	Upgrade path
Any 5.x or 6.x version	Perform a new installation of the new version of Interact in a new location. **Note:** There is no upgrade path from Interact 5.x or 6.x to the new version of Interact.

Any 7.x or 8.x version	1. Perform an in-place installation of the new version over your old version.
	   Use the Interact installer for both the design environment and the runtime environment.
	   Important: You must upgrade Campaign before upgrading your Interact design environment.
	2. Run the upgrade tools to upgrade configuration settings, files, and data from your source Interact version.
	3. Upgrade your reports following the instructions in the chapter "Upgrading Reports" in the *Marketing Platform Installation Guide*.

Chapter 9. About upgrading Interact

Before you upgrade from any version of Interact, be sure you have read and understood the following information.

- The introductory chapter Chapter 8, "Upgrade prerequisites for all IBM Unica Marketing products," on page 47, which contains important information about upgrading all IBM Unica Marketing products.
- All the topics in this section, to understand what you must do to upgrade from your old version of Interact to the new version.

Upgrading Interact

You can upgrade Interact beginning with version 7.5.x.

Due to the architectural changes between Interact version 7.5.0 and previous versions of Interact, there is no upgrade path from earlier versions of Interact.

The following sections describe how to perform an in-place upgrade of Interact.

Upgrading from any Interact 7.x or 8.x version

To upgrade from any Interact 7.x or 8.x version, you perform an in-place upgrade installation of the new version of Interact, then run the upgrade tool to upgrade system data.

Before performing the upgrade, read the following sections.
- "About the Interact upgrade tools"
- "About the upgrade log" on page 50
- "About upgrading partitions" on page 50
- "About starting and stopping servers during upgrading" on page 50

About the Interact upgrade tools

Interact provides five upgrade tools, one for upgrading the design environment (aciUpgradeTool) and four for upgrading the runtime environment (`aciUpgradeTool_crhtab`, `aciUpgradeTool_lrntab`, `aciUpgradeTool_runtab`, and `aciUpgradeTool_usrtab`). These scripts are delivered with the new version of Interact, and are only available after you have run the IBM Unica Marketing suite installer in clean or upgrade mode for both the runtime environment and the design environment.

You upgrade the Interact design environment configuration properties when you upgrade the Campaign configuration properties.

Tool	Location	Purpose
aciUpgradeTool	*Interact_Design_Install_Directory* /interactDT/tools/upgrade	Upgrades the Interact design environment tables in the Campaign system tables.

Tool	Location	Purpose
aciUpgradeTool_runtab	*Interact_Runtime_Install_Directory* /tools/upgrade	Upgrades the Interact runtime environment tables and the Interact runtime environment configuration properties.
aciUpgradeTool_lrntab	*Interact_Runtime_Install_Directory* /tools/upgrade	Upgrades the Interact learning tables.
aciUpgradeTool_crhtab	*Interact_Runtime_Install_Directory* /tools/upgrade	Upgrades the contact and response history tables used with cross-session response tracking.
aciUpgradeTool_usrtab	*Interact_Runtime_Install_Directory* /tools/upgrade	Upgrades the Interact tables required in your profile user tables.

When running any of the upgrade tools, you can abort the upgrade at any prompt by typing `abort`.

About the upgrade log

When you run the upgrade tool, it writes processing details, warnings, and errors to a log file.

By default, the log is named `aci_upgrade.log`and is located in a `logs` directory in the same directory as the upgrade tool. The log file's location and level of verbosity are specified in the `setenv` script file, and you can modify those settings prior to running the tool if needed by opening the setenv script in any text editor.

About upgrading partitions

If you have multiple partitions in the Interact design environment, run the upgrade tool once for each partition.

Important: Partitions must have the same names in the source and target versions.

The Interact runtime environment does not require additional procedures if you have multiple partitions.

About starting and stopping servers during upgrading

When the JDBC drivers in WebLogic are used for migration, the web application server on which the new version of the Interact runtime server is deployed must always remain running to provide access to the database drivers.

To upgrade from any Interact 7.x or 8.x version

The following lists provide the tasks you need to perform to upgrade from any Interact 7.x or 8.x version to the new version of Interact.
* Upgrade the Interact runtime environments.
* Upgrade Interact design environment
* After you upgrade your Interact design environment and runtime environments, you are ready to upgrade your Interact implementation.

Back up Interact runtime environment

Back up all files and the system table database used by your old installation of Interact runtime environment. You only need to back up one Interact runtime server per server group.

If your Interact runtime environment installation will require any of the configuration settings from your old Interact version in addition to the new (default) settings in the new version, use the `configTool` utility to export the old Interact configuration parameters. Specify a different file name for the `exported.xml` file and note the location to which you save it.

Undeploy Interact runtime server

You must perform this step so that the web application server releases the lock on the `InteractRT.war` file, which will be updated by the Interact upgrade installation. This allows the upgrade to cleanly update the `InteractRT.war` file and register the new version of Interact in the IBM Unica Marketing console.

1. Follow the instructions in your web application server to undeploy the `Interact.war` file, and save or activate all changes.
2. Shut down and restart the web application server after undeploying Interact runtime server to ensure that the lock on `.war` file is released.

Install the new version of Interact

Follow the detailed installation steps in "Installing the products" on page 16 to install the new version of Interact. To ensure that the installer automatically upgrades your existing installation, make sure you perform the following step:

- When upgrading the design environment, when prompted for the install location during installation, select the same location as your old Interact Design Time system's location.
- When upgrading the runtime environment, when prompted for the install location during installation, select the same location as your old Interact Run Time system's location.

Review SQL upgrade script and modify, if necessary

If your Interact runtime environment includes customizations to the runtime system tables that modified the default Data Definition Language (DDL) included with Interact, you must modify the default SQL upgrade script for your database to match your customizations.

Common customizations include changes to support multiple audience levels or using views of tables. You may want to review the data dictionaries for the new versions of IBM Unica products to confirm column sizes map correctly and that foreign key constraints from additional products do not conflict.

The `aci_runtab_upgrd` and the `aci_usrtab_upgrd` are the SQL upgrade scripts that most likely require revisions.

Important: You must complete these changes before running the Interact upgrade tool.

1. Locate the upgrade script for your database type. The scripts are installed in the /ddl/Upgrades or /ddl/Upgrades/Unicode directory under your Interact installation after you run the IBM Unica Marketing installer in upgrade mode.
2. Ensure that your database schema matches the DDL included with Interact. If your database schema does not match the DDL in the upgrade script, edit the script for your database type to match your environment.

Example modifications to the SQL upgrade script

The following example shows required modifications to the aci_runtab_upgrd SQL upgrade script for supporting additional audience levels.

Your existing Interact design environment contains an additional audience level called Household. To support this audience level, your Interact runtime environment database contains tables named HH_CHStaging and HH_RHStaging.

Required changes to the upgrade script

Locate the code in the SQL upgrade script that updates response history and treatment sizes for the Customer audience level and replicate it for your Household audience level. Change the table names in these statements to the appropriate names for your Household audience level.

You must also revise the SQL to support the data type change for the SeqNum column in the UACI_RHStaging table. The value of the SeqNum is a sequential number across all response history staging tables. The next value used is tracked by the NextID column in the UACI_IdsByType table where the TypeID is 2. For example, you have three audience levels, customer, household, and account. In the customer response history staging table the highest SeqNum is 50. In the household response history staging table the highest SeqNum is 75. In the account response history staging table the highest SeqNum is 100. Therefore, you must alter the SQL to set the NextID for TypeID = 2 in the UACI_IdsByType to 101.

The following example SQL statements show the required additions to the aci_runtab_upgrd_sqlsvr.sql script for a SQL Server database containing the Household audience level. Text that has been changed to support the Household audience level is in bold:

```
ALTER TABLE UACI_CHStaging ADD RTSelectionMethod int NULL
go

ALTER TABLE UACI_RHStaging ADD RTSelectionMethod int NULL
go

ALTER TABLE HH_CHStaging ADD RTSelectionMethod int NULL
go

ALTER TABLE HH_RHStaging ADD RTSelectionMethod int NULL
go

insert into UACI_IdsByType (TypeID, NextID) (select 2,
 IDENT_CURRENT('UACI_RHStaging') + IDENT_CURRENT('HH_RHStaging')
 + IDENT_INCR( 'UACI_RHStaging' ))
go

select * into UACI_RHStaging_COPY from UACI_RHStaging
go

select * into HH_RHStaging_COPY from HH_RHStaging
go
```

```
DROP TABLE UACI_RHStaging
go

CREATE TABLE UACI_RHStaging (
        SeqNum                  bigint NOT NULL,
        TreatmentCode           varchar(512) NULL,
        CustomerID              bigint NULL,
        ResponseDate            datetime NULL,
        ResponseType            int NULL,
        ResponseTypeCode        varchar(64) NULL,
        Mark                    bigint NOT NULL
                                            DEFAULT 0,
        UserDefinedFields       char(18) NULL,
  RTSelectionMethod     int NULL,
        CONSTRAINT iRHStaging_PK
                PRIMARY KEY (SeqNum ASC)
)
go

insert into UACI_RHStaging (SeqNum, TreatmentCode, CustomerID, ResponseDate,
 ResponseType, ResponseTypeCode, Mark, UserDefinedFields, RTSelectionMethod)
  (select SeqNum, TreatmentCode, CustomerID, ResponseDate, ResponseType,
  ResponseTypeCode, Mark, UserDefinedFields, RTSelectionMethod from
  UACI_RHStaging_COPY)
go

DROP TABLE UACI_RHStaging_COPY
go

DROP TABLE HH_RHStaging
go

CREATE TABLE HH_RHStaging (
        SeqNum                  bigint NOT NULL,
        TreatmentCode           varchar(512) NULL,
        HouseholdID              bigint NULL,
        ResponseDate            datetime NULL,
        ResponseType            int NULL,
        ResponseTypeCode        varchar(64) NULL,
        Mark                    bigint NOT NULL
                                            DEFAULT 0,
        UserDefinedFields     char(18) NULL,
  RTSelectionMethod     int NULL,
        CONSTRAINT iRHStaging_PK
                PRIMARY KEY (SeqNum ASC)
)
go

insert into HH_RHStaging (SeqNum, TreatmentCode, HouseHoldID, ResponseDate,
 ResponseType, ResponseTypeCode, Mark, UserDefinedFields, RTSelectionMethod)
  (select SeqNum, TreatmentCode, HouseHoldID, ResponseDate, ResponseType,
  ResponseTypeCode, Mark, UserDefinedFields, RTSelectionMethod from
  HH_RHStaging_COPY)
go

DROP TABLE HH_RHStaging_COPY
go
```

For DB2 and Oracle databases, the following statement would be used for inserting values into the UACI_IdsByType table:

```
INSERT into UACI_IdsByType (TypeID, NextID)
 (select 2, COALESCE(max(a.seqnum)+1,1)
 + COALESCE(max(b.seqnum)+1,1)
 from UACI_RHSTAGING a, ACCT_UACI_RHSTAGING b );
```

If you have multiple audiences, you will need to add sections to the
aci_usrtab_upgrd SQL script for each audience level as shown in the following
example. The example shows the modified additions only.

```
ALTER TABLE HH_ScoreOverride  ADD
        OverrideTypeID      int NULL,
        CellCode            varchar(64) NULL,
        Zone                varchar(64) NULL
go

ALTER TABLE HH_ScoreOverride  ADD
        Predicate           varchar(4000) NULL,
        FinalScore          float NULL,
        EnableStateID       int NULL
go

CREATE INDEX iScoreOverride_IX1 ON HH_ScoreOverride
(
        HouseHoldID                     ASC
)
go
```

Set environment variables

Edit the setenv file to set environment variables required by the upgrade tool.

For the Interact design environment, the file is located in the /interactDT/tools/
upgrade directory under your Interact design environment installation.

For the Interact runtime environment, the file is located in the /tools/upgrade
directory under your Interact runtime environment installation.

Environment variables required by the upgrade tool

The following tables describe the environment variables you must set for the
Interact upgrade tools in the setenv files.

The environment variables for SSL upgrade are required for both the design and
run time environments.

The setenv file for the design environment is located in the
Interact_Design_Environment_Install_Directory/interactDT/tools/upgrade
directory.

The setenv file for the runtime environment is located in the
Interact_Runtime_Environment_Install_Directory/tools/upgrade directory.

Interact design environment

Variable	Description
JAVA_HOME	Root directory of the JDK used by your new Campaign 8.x installation.
JDBCDRIVER_CP	The path to the directory which contains the JDBC driver. This is the default path to the JDBC driver; you can override this path when running the upgrade tool.
JDBCDRIVER_CLASS	The class for the JDBC driver. This is the default class to the JDBC driver; you can override this class when running the upgrade tool.

Variable	Description
JDBCDRIVER_URL	The URL for the JDBC driver. This is the default URL for the JDBC driver; you can override this URL when running the upgrade tool.
ERROR_MSG_LEVEL	Desired logging level. Valid values, listed from most to least verbose. • DEBUG • INFO • ERROR • FATAL
LOG_TEMP_DIR	Directory where you want the migration tool to create log files.
LOG_FILE_NAME	The filename for the log file for the upgrade tool.

Interact runtime environment

Variable	Description
JAVA_HOME	Root directory of the JDK used by your new Interact 8.x installation.
JDBCDRIVER_CP	The path to the directory which contains the JDBC driver. This is the default path to the JDBC driver; you can override this path when running the upgrade tool.
JDBCDRIVER_CLASS	The class for the JDBC driver. This is the default class to the JDBC driver; you can override this class when running the upgrade tool.
JDBCDRIVER_URL	The URL for the JDBC driver. This is the default URL for the JDBC driver; you can override this URL when running the upgrade tool.
ERROR_MSG_LEVEL	Desired logging level. Valid values, listed from most to least verbose. • DEBUG • INFO • ERROR • FATAL
LOG_TEMP_DIR	Directory where you want the migration tool to create log files.
LOG_FILE_NAME	The filename for the log file for the upgrade tool.

Environment variables to support SSL upgrade (run time and design environments)

Variable	Description
IS_WEBLOGIC_SSL	Should the connection to the target system's server by via SSL? Valid values are YES and NO. If this value is set to NO, you do not need to set the remaining SSL properties.
BEA_HOME_PATH	The path to the location where the target system's WebLogic server is installed. This is required to point to the license.bea file in this path. If you are installing in a distributed environment where the target system's WebLogic server is not available locally to this script, copy the license.bea file locally to some folder, and specify the path to that folder using this variable.

Variable	Description
SSL_TRUST_KEYSTORE_FILE_PATH	Path of the trust store used to configure SSL in the target system's WebLogic server. This is where the trusted certificates reside. Used for SSL handshake.
SSL_TRUST_KEYSTORE_PASSWORD	Password of the trust store used to configure SSL in the target system's WebLogic server. If there is no password, set it to "" or nothing. Used for SSL handshake.

Run the upgrade tool for the design environment

Before running the upgrade tool, start the Web application server on the target system.

You must run the upgrade tool to update the Interact tables in the Campaign system tables. If you have multiple partitions, configure and run the upgrade tool once for each partition.

Important: The appropriate database client executable (`sqlplus`, `db2`, or `osql`) for the Campaign system tables data source must be accessible on the PATH of the user who will run the upgrade tool.

The latest versions of the upgrade tool (`aciUpgradeTool`) is located in the `/interactDT/tools/upgrade` directory under your Interact design environment installation. If your version is not listed, use the latest version available. Enter the requested information at the prompts to upgrade your system tables for the new version of Interact. When the tool completes successfully, your upgrade process is complete.

Information required for running the design environment upgrade tool (aciUpgradeTool)

Gather the following information about your Interact design environment installation before running the upgrade tool (aciUpgradeTool).

Target system configuration information
- The name of the partition you are upgrading
- Directory of UNICA_PLATFORM_HOME
- Full path of the Campaign configuration file (`campaign_configuration.xml`). This file is located in the conf directory under your Campaign installation.

If you connect to the design environment system tables using the web application server, collect the following information.
- Host name
- Port
- User name
- Password
- For WebLogic: Full path and file name of the WebLogic jar file

If you connect to the design environment system tables using JDBC, collect the following information.
- Java class name for the JDBC driver
- JDBC URL

- Additional properties required by the JDBC driver
- Database username and password

Target design environment database information
- Catalog (or database) containing the target design environment system tables
- Schema
- Whether or not the tables are configured for Unicode

Interact Design Time installation on source system
- Version of Interact Design Time you are upgrading from

Run the upgrade tools for the runtime environment

Before running the upgrade tools, start the Web application server on the target system.

You must run the upgrade tools to update the Interact tables in the runtime, learning, contact history, response history, and user profile tables.

The latest versions of the upgrade tools are located in the `/tools/upgrade` directory under your Interact runtime environment installation. If your version is not listed, use the latest version available. Enter the requested information at the prompts to upgrade your tables for the new version of Interact. When the tool completes successfully, your upgrade process is complete.

Important: Run these scripts only once for each server group.

You must run the tools in the following order.
1. Run `aciUpgradeTool_runtab` to update the systemTablesDataSource and the Interact runtime configuration properties.
2. ONLY if you are using built-in learning, run `aciUpgradeTool_lrntab` to update the learningTablesDataSource.
3. ONLY if you are using cross-session response tracking, modify the `/tools/upgrade/conf/ACIUpgradeTaskList_crhtab.properties` if necessary, then run `aciUpgradeTool_crhtab` to update the contactAndResponseHistoryDataSource.

   Note that you need to modify the `ACIUpgradeTaskList_crhtab.properties` file only if you are upgrading from Interact version 8.x and the Interact runtime data source (as specified in the `Interact | general | contactAndResponseHistoryDataSource` configuration property) is **not** the same as the Campaign system tables data source. The properties file contains instructions for enabling the three required settings for this situation.
4. ONLY if you are using the `scoreOverride` or `defaultOffers` tables, run `aciUpgradeTool_usrtab` to update the prodUserDataSource.

Information required for running the runtime environment upgrade tools

Gather the following information about your Interact runtime installation before running the upgrade tools

aciUpgradeTool_runtab

Target system configuration information
- Directory of UNICA_PLATFORM_HOME
- Full path of the Interact configuration file (`interact_configuration.xml`). This file is located in the conf directory under your Interact installation.

If you connect to the runtime environment system tables using the web application server, collect the following information.
- Host name
- Port
- User name
- Password
- For WebLogic: Full path and file name of the WebLogic jar file

If you connect to the runtime environment system tables using JDBC, collect the following information.
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver
- Database username and password

Target runtime environment database information
- Catalog (or database) containing the target runtime environment system tables
- Schema
- Whether or not the tables are configured for Unicode

Interact installation on source system
- Version of Interact you are upgrading from

aciUpgradeTool_lrntab

Target system configuration information
- Directory of UNICA_PLATFORM_HOME

If you connect to the learning tables using the web application server, collect the following information.
- Host name
- Port
- User name
- Password
- For WebLogic: Full path and file name of the WebLogic jar file

If you connect to the learning tables using JDBC, collect the following information.
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver
- Database username and password

Target learning database information
- Catalog (or database) containing the target learning tables
- Schema
- Whether or not the tables are configured for Unicode

Interact installation on source system
- Version of Interact you are upgrading from

aciUpgradeTool_crhtab

Target system configuration information
- Directory of UNICA_PLATFORM_HOME

If you connect to the contact history tables for cross-session response using the web application server, collect the following information.
- Host name
- Port
- User name
- Password
- For WebLogic: Full path and file name of the WebLogic jar file

If you connect to the contact history tables for cross-session response using JDBC, collect the following information.
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver
- Database username and password

Target contact history tables for cross-session response database information
- Catalog (or database) containing the target contact history tables for cross-session response
- Schema
- Whether or not the tables are configured for Unicode

Interact installation on source system
- Version of Interact you are upgrading from

aciUpgradeTool_usrtab

Target system configuration information
- Directory of UNICA_PLATFORM_HOME

If you connect to the user profile tables using the web application server, collect the following information.
- Host name
- Port
- User name
- Password
- For WebLogic: Full path and file name of the WebLogic jar file

If you connect to the user profile tables using JDBC, collect the following information.
- Java class name for the JDBC driver
- JDBC URL
- Additional properties required by the JDBC driver
- Database username and password

Target user profile database information
- Catalog (or database) containing the target user profile tables
- Schema
- Whether or not the tables are configured for Unicode

Interact installation on source system
- Version of Interact you are upgrading from

Redeploy Interact runtime server in the web application server

Redeploy the newly-installed version of Interact runtime server in your web application server.

Upgrade existing interactive channels (only if upgrading from 7.5.x versions)

Interact 8.x allows table mapping in the interactive channel. This enables you to manage your user profile table mapping per interactive channel. However, you must re-map all your tables in your interactive channels before you can re-deploy your interactive channels. Immediately after completing an upgrade, your interactive flowcharts are disabled until you map your user profile tables in the interactive channel.

You can no longer map dimension tables in interactive flowchart processes. Any profile or dimension table you want to use must be mapped in the interactive channel. You can map a general table in a Snapshot process.

For instructions on performing these steps, see the *Interact User's Guide*.

After you map the user profile and dimension tables in the interactive channels, you must reconfigure your interactive flowcharts to use these mapped tables.

Upgrade existing interactive flowcharts (only if upgrading from 7.5.x versions)

For upgrades from Interact 7.5.x versions only, after you re-map your tables in the interactive channel, you must reconfigure any process in your interactive flowchart that uses a table, such as Decision, Select, or Snapshot.

Immediately after completing an upgrade, your interactive flowcharts are disabled until you map your user profile tables in the interactive channel and then reselect tables in your processes.

For instructions on performing these steps, see the *Interact User's Guide*.

After you re-select the tables in the processes, mark the flowchart for deployment and deploy your interactive channels.

Note: For upgrades from 7.x: A Interact 8.x runtime server is backwards compatible with a 7.5.x deployment. Do not deploy from a version 8.x design environment until you have also upgraded your runtime servers.

Convert categories to templates (upgrades from 7.5.1 and 7.5.2 only; not applicable for upgrades from 7.5.3 to 8.x)

If you are upgrading your 7.5.1 or 7.5.2 installation to 8.x, follow the instructions here. Upgrades from 7.5.3 and later versions do not need these instructions.

After upgrading an Interact 7.5.x installation to 8.x, use the Marketing Platform`configTool` utility to convert the `contactAndResponseHistTracking` and `learningAttributes` categories on the Configuration page to templates. The `configTool` utility is located in the `tools/bin` directory of your Marketing Platform installation, and is called `configTool.bat` on a Windows server, and `configTool.sh` on a UNIX server.

1. Execute the following command to export the existing contact and response history and learning configurations:

   ```
   configTool.bat -x -p "Affinium|Campaign|partitions|<partition_name>|
     Interact|contactAndResponseHistTracking" -f .\InteractCHRH.xml
   ```

   ```
   configTool.bat -x -p "Affinium|Campaign|partitions|<partition_name>|
     Interact|learning|learningAttributes" —f .\InteractLearning.xml
   ```

2. In the `InteractCHRH.xml` file, change the template value to "true" as shown in the following example:

   ```
   <?xml version="1.0" encoding="UTF-8"?>
   <category id="3770" name="contactAndResponseHistTracking">
        <category id="3772" name="runtimeDataSources">
             <category id="3773" name="runtimeDataSource" template="true">
                  <property id="3774" name="databaseType"
        type="dropdown_property" width="40">
                       <value selected="true" predefined="true">
        SQLServer</value>
                       <value selected="false" predefined="true">
        DB2</value>
                       <value selected="false" predefined="true">
        ORACLE</value>
                  </property>
   ```

3. In the `InteractLearning.xml` file, change the template value to "true" as shown in the following example:

   ```
   <?xml version="1.0" encoding="UTF-8">
   <category id="3792" name="learningAttributes">
        <category id="3793" name="learningAttributes" template="true">
             <property id="3794" name="attributeName" type="string_property"
        width="40">
             </property>
        </category>
   </category>
   ```

4. Execute the following commands to import the updated configurations:

   ```
   configTool.bat -i -o -p "Affinium|Campaign|partitions|<partition_name>|
     Interact" -f InteractCHRH.xml
   ```

   ```
   configTool.bat -i -o -p "Affinium|Campaign|partitions|<partition_name>|
     Interact|learning" -f InteractLearning.xml
   ```

Adjust the size of the Predicate field (DB2 users upgrading from 7.x only)

If you are upgrading a DB2 user database from Interact 7.x to any 8.x version or higher, you must run a SQL statement manually against the user database before continuing.

Note: Before executing the following SQL code, you may need to adjust the size of the varchar field (Predicate) to make sure the total width of this table does not exceed the page size where this table (UACI_ScoreOverride) resides.

The SQL code to execute against the DB2 user database is listed here:

```
ALTER TABLE UACI_ScoreOverride
        ADD Predicate           varchar(4000)
        ADD FinalScore          float
        ADD EnableStateID       int;
```

Upgrade Interact API

After you have upgraded your runtime servers, you may need to rebuild your Interact API implementation, depending on the following conditions:

- If you upgraded your runtime servers from Interact 7.5x to the current release, you must rebuild your Unica Interact API implementation.
- If you upgraded your runtime servers from Interact 8.x, you do not have to rebuild your Interact API implementation.

Previous versions of the Interact API are backwards-compatible with the new version of the Interact API.

If you rebuild your Interact API implementation, make sure you are running against the new interact_client.jar located in the lib directory of your Interact runtime environment installation.

Appendix. Uninstalling IBM Unica products

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

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

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

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

To uninstall Interact

In addition to the general instructions for uninstalling IBM Unica Marketing products, follow these guidelines when uninstalling Interact.

If you have multiple Interact runtime installations using the same Marketing Platform installation, you must remove network connectivity for the Interact runtime machine before running the uninstaller. Failure to do so will uninstall all of the configuration data for all other Interact runtime installations from Marketing Platform.

You can safely ignore any warnings regarding failure to unregister with Marketing Platform.

You may want to export a copy of your configuration as a precaution before uninstalling Interact.

If you choose to uninstall the Interact design environment, after you run the uninstaller, you may need to manually unregister Interact. Use `configtool` to unregister `full_path_to_Interact_DT_installation_directory\interactDT\conf\interact_navigation.xml`.

1. Undeploy the IBM Unica Marketing product web application from WebSphere or WebLogic.
2. Shut down WebSphere or WebLogic.
3. Run the IBM Unica Marketing uninstaller and follow the directions in the wizard.

   The uninstaller is located in the `Uninstall_Product` directory, where *Product* is the name of your IBM Unica Marketing product.

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).

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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