HCLSoftware

**Unica Centralized Offer Management
V12.1.7 Installation Guide**

Contents

Chapter 1. Installation overview

The installation of HCL Unica products is complete when you install, configure, and deploy the HCL Unica products. The Installation Guide provides detailed information about installing, configuring, and deploying the products.

How the installers work

You must use the suite installer and the product installer when you install any Unica product. For example, for installing Unica Platform and Unica Centralized Offer Management, you must use the Unica suite installer and the Unica Centralized Offer Management installer.

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

- The suite installer and the product installer must be in the same directory on the computer where you want to install the product. When multiple versions of a product installer are present in the directory with the master installer, the master installer always shows the latest version of the product on the Unica products screen in the installation wizard.
- The default top-level directory for Unica installations is `/root/HCL/Unica` for UNIX™ or `C:\HCL\Unica` for Microsoft® Windows®. However, you can change the directory during installation.

Modes of installation

The Unica suite installer can run in one of the following modes: GUI mode / X Window System mode, Console mode, or Silent mode (also called the unattended mode). Select a mode that suits your requirements when you install Unica Centralized Offer Management.

GUI mode or X Window System mode

To install Unica Centralized Offer Management using the GUI mode, use:

- the GUI mode for Microsoft Windows
- the X Window System mode for UNIX

Console mode

To install Unica Centralized Offer Management in console mode, use the command line window.

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

Silent mode

To install Unica Centralized Offer Management multiple times, use the silent mode or the unattended mode. The silent mode uses response files for installation. It does not require user input during the installation process.

Unica Centralized Offer Management documentation and help

The following table describes the various tasks in the installation of Unica Centralized Offer Management.

The **Documentation** column contains names of documents where you can find more information about the tasks.

Table 1. Get up and running

Task	Documentation
View a list of new features, known issues, and workaround	*Unica Centralized Offer Management Release Notes.*
Install Centralized Offer Management and deploy Centralized Offer Management web application	*Unica Centralized Offer Management Installation Guide.*

The following tables describes administrative tasks in Centralized Offer Management. The **Documentation** column contains names of documents where you can find more information about the tasks.

Table 2. Configure and use Centralized Offer Management

Task	Documentation
• Create custom attributes • Create custom templates • Create offers without template	*Unica Centralized Offer Management Administrator's Guide*
• Create offers • Create offer lists	*Unica Centralized Offer Management User's Guide*

The following tables contains information about Online Help and obtaining PDFs for Unica Centralized Offer Management. The **Instructions** column describes how to open Online Help and access documentation for the Unica Centralized Offer Management.

Table 3. Getting help

Task	Instructions
Obtain PDFs	Use either of the following methods: • Choose **Help > Product Documentation** to access Centralized Offer Management PDFs. • Choose **Help > All Unica Suite Documentation** to access all available documentation.

Chapter 2. Planning Unica Centralized Offer Management installation

When you plan your Unica Centralized Offer Management installation, ensure that you have set up your system correctly, and that you have configured your environment to deal with any failures.

Prerequisites

Before you install a Unica product, you must ensure that your computer complies with all the prerequisite software and hardware.

System requirements

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

Network domain requirements

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

JVM requirements

Unica applications within a suite must be deployed on a dedicated Java™ virtual machine (JVM). You can deploy Unica Centralized Offer Management on a dedicated JVM, or you can deploy it in the same JVM of Unica Platform and Unica Campaign.

Knowledge requirements

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

Internet browser settings

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

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

Access permissions

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

- Administration access for all necessary databases

  > **Note:** Administrator must have `CREATE`, `SELECT`, `INSERT`, `UPDATE`, `DELETE`, and `DROP` rights for both tables and views.

- Read and write access to the relevant directory and sub-directories for the operating system account that you use to run the web application server and Unica components
- Write permission for all files that you must edit
- Write permission for all directories where you must save a file, such as the installation directory and backup directory if you are upgrading
- Appropriate read, write, and execute permissions to run the installer

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

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

The following additional permissions are necessary for UNIX™:

- The user account that installs Centralized Offer Management and Unica Platform must be a member of the same group as the Unica Centralized Offer Management users. This user account must have a valid home directory and have write permissions for that directory.
- All installer files for HCL Marketing Software products must have full permissions, for example, rwxr-xr-x.

Points to consider before you install Unica Centralized Offer Management

For Unica Centralized Offer Management installation, you are required to consider the following points.

JAVA_HOME environment variable

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

If the JAVA_HOME environment variable points to an incorrect JRE, you must clear the JAVA_HOME variable before you run the Unica installers.

You can clear the JAVA_HOME environment variable by using one of the following methods:

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

You can clear the JAVA_HOME environment variable by running the following command in the terminal:

export JAVA_HOME= (leave empty)

The Unica installer installs a JRE in the top-level directory for the Unica installation. Individual Unica application installers do not install a JRE. Instead, they point to the location of the JRE that is installed by the Unica installer. You can reset the environment variable after all installations are complete.

For more information about the supported JRE, see the *Recommended Software Environments and Minimum System Requirements* guide.

Unica Platform and Unica Campaign requirements

You must install, or upgrade to, version 12.1 of Unica Platform and Unica Campaign before you install or upgrade any Unica products. For each group of products that work together, you must install or upgrade Unica Platform only once. Each product installer checks whether the required products are installed. If your product or version is not registered with Unica Platform, a message prompts you to install or upgrade Unica Platform before you proceed with your installation. Unica Platform must be deployed and running before you can set any properties on the **Settings > Configuration** page.

> **Note:** For versions 12.0.0 and higher, ensure that you do not select the database type Informix as it is not functional. From version 12.1.0.3 and higher, users can use OneDB database as system table and user tables. See the *Unica V12.1.0.3 with OneDB as System Tables Guide* for more details.

Installation order for Unica products

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

The following table provides information about the order that you must follow when you install or upgrade multiple Unica products.

Table 4. Installation or upgrade order for Unica products

For this product or combination:	Install or upgrade in this order:
Unica Centralized Offer Management	1. Unica Platform 2. Unica Campaign 3. Unica Centralized Offer Management **Note:** Since Centralized Offer Management requires Unica Campaign database, you must also install Unica Campaign. Install Unica Campaign after installing Unica Platform.

Where to install Unica Centralized Offer Management and Unica Platform

Unica Centralized Offer Management: You can install Unica Centralized Offer Management on its own machine, where no other Unica products are installed, or on a machine that it shares with Unica Platform.

Unica Platform: The Unica Platform application contains the common navigation, reporting, user administration, security, scheduling, and configuration management features. For each Unica environment, you must install and deploy the Unica Platform once.

Chapter 3. Configuring the web application server for your JDBC driver

The web application server where you plan to deploy Unica Centralized Offer Management must contain the correct JAR file to support JDBC connections. This enables your web application to connect to the system tables. The location of the JAR file must be included in the class path of the web application server.

About this task

If you are using WebSphere and WebLogic, you can skip the steps in this procedure about setting the class path.

If you are using WebLogic, you must perform this entire procedure.

> **Note:** If you are installing Unica Centralized Offer Management on the same machine where you installed Unica Platform, this task is already complete. Continue to .

1. Obtain the latest Type 4 JDBC drivers and any required associated files (for example, Oracle requires several associated files) for the database you plan to use. See the *Recommended Software Environments and Minimum System Requirements* guide for details.

   You should always use the latest vendor-provided Type 4 driver.

   - If the driver does not exist on the machine where Unica Centralized Offer Management will be installed, obtain it, and copy it to any location on the Unica Centralized Offer Management machine.
   - If you obtain the driver from a machine where the database client is installed, verify that the version is the latest supplied by the database vendor. See your consultant for a list of supported JDBC drivers.

2. Include the full path to the driver in the `CLASSPATH` of the web application server where you plan to deploy Unica Centralized Offer Management, as follows.
   - For all supported versions of WebLogic, add the `jar` files to the `CLASSPATH` variable in `DOMAIN_DIR\bin\setDomainEnv.cmd`. Yours must be the first entry of the `CLASSPATH` values to ensure that the web application server uses the correct driver. For example, if you are using SQL Server you might set the path as follows.

     ```
     set CLASSPATH=c:\SQLDRIVER\sqljdbc.jar;%PRE_CLASSPATH%;%WEBLOGIC_CLASSPATH%;
     %POST_CLASSPATH%;%WLP_POST_CLASSPATH%
     ```
   - For all supported versions of WebSphere®, set the `CLASSPATH` in the Administration Console.

Creating JDBC connections in the web application server

The Unica Centralized Offer Management web application uses JDBC connections to communicate with the system table database and with the Unica Platform and Unica Campaign system table database.

About this task

You must create this JDBC connection in the web application server where you plan to deploy Unica Centralized Offer Management. If you are using WebLogic or Tomcat, you must add the JDBC driver to your class path manually. The installer does this automatically for WebSphere.

> ⚠️ **Important:** For the connection to the database holding the Unica Platform system tables, you must use `UnicaPlatformDS` as the JNDI name. For the connection to the database holding the Unica Campaign system tables, you must use `campaignPartition1DS` as the JNDI name. If Campaign has multiple partitions, we will need the datasources for all the partitions of Campaign. These are the required JNDI names.

If you expect to have many concurrent users in Unica Centralized Offer Management, you may need to increase the number of connections in your web server. For best results, set your web server to allow 50 connections.

Information for creating JDBC connections

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

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

WebLogic

Use the following values if your application server is WebLogic:

SQLServer

   • Database Driver: Microsoft™ MS SQL Server Driver 2014, 2016 SP1, 2017
   • Default port: 1433
   • Driver class: `com.microsoft.sqlserver.jdbc.SQLServerDriver`
   • Driver URL: `jdbc:sqlserver://<your_db_host>[\`
     `\<named_instance>]:<your_db_port>;databaseName=<your_db_name>`
   • Properties: Add `user=<your_db_user_name>`

Oracle

   • Driver: Other
   • Default port: 1521
   • Driver class: `oracle.jdbc.OracleDriver`
   • Driver URL: `jdbc:oracle:thin:@<your_db_host>:<your_db_port>:<your_db_service_name>`

Enter the driver URL by using the format that is shown. Unica applications do not allow the use of Oracle's RAC (Real Application Cluster) format for JDBC connections.

- Properties: Add `user=<your_db_user_name>`

DB2®

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

MariaDB

- Driver: org.mariadb.jdbc.Driver
- Default port: 3306
- Driver class: `com.ibm.db2.jcc.DB2Driver`
- Driver URL: `jdbc:mysql://hostname:port/databaseName`

PostgreSQL

- Database type: User_define
- Implementation class name = org.postgresql.ds.PGConnectionPoolDataSource
- Driver: postgresql-42.5.4.jar

JNDI custom properties

- Component-managed authentication alias = Select the authentication details for user
- Mapping-configuration alias = WSLogin
- portNumber = 5432
- databaseName = <DATABASE NAME>
- serverName = the host name of the PostgreSQL server
- user = the user name of the PostgreSQL server
- password = the password associated with the user name

Tomcat

Specify the native library path of the database driver JAR file on your server. For example: `db2jcc4.jar/ojdbc8.jar/sqljdbc-6.4.0.jre8.jar` to create a datasource under Tomcat Interact Instance, add folder hierarchy as `<Tomcat_Home>/conf/Catalina/localhost`, create a xml file with the name `Offer.xml` under localhost folder. Add data source pointing to Runtime, Test, Production, and learning database in interact.xml, refer platform or Campaign xml file which is created through installers inside their respective Tomcat instance directory. You will need to create these Data source entry in Campaign Tomcat instance too.

> 📝 **Note:** If you want to encrypt password then run utility `encryptTomcatDBPasswords.sh` from `<PLATFORM_HOME>/tools/bin`. To know more about utility, see *Unica Platform Administrator Guide*.

Use the following values if your application server is Tomcat:

SQLServer

- Database Driver: Microsoft MS SQL Server Driver (Type 4) Versions: 2014, 2016 SP1, 2017
- Default port: 1433
- Driver class: `com.microsoft.sqlserver.jdbc.SQLServerDriver`
- Driver type: `javax.sql.DataSource`
- Driver URL: `jdbc:sqlserver://<your_db_host>[\`
  `\<named_instance>]:<your_db_port>;databaseName=<your_db_name>`

Oracle

- 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: JCC 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>`

MariaDB

- Driver: `MariaDBDriver` (this is the mariadb jar registered with mariadb)
- Default port: `3306`
- Driver class: `org.mariadb.jdbc.MariaDbDataSource`
- Driver URL: `jdbc:mariadb://<your_db_host>:<your_db_port>/<your_db_name>jdbc:db2://<your_db_host>:<your_db_port>/<your_db_name>`

PostgreSQL

- Database type: User_define
- Implementation class name = org.postgresql.ds.PGConnectionPoolDataSource
- Driver: postgresql-42.5.4.jar

JNDI custom properties

- Component-managed authentication alias = Select the authentication details for user
- Mapping-configuration alias = WSLogin
- portNumber = 5432
- databaseName = <DATABASE NAME>
- serverName = the host name of the PostgreSQL server
- user = the user name of the PostgreSQL server
- password = the password associated with the user name

WebSphere®

Use the following values if your application server is WebSphere®:

SQLServer

- Driver: N/A
- Default port: 1433
- Driver class: `com.microsoft.sqlserver.jdbc.SQLServerConnectionPoolDataSource`
- Driver URL: `jdbc:sqlserver://<DBhostName>:1433;databaseName=<DBName>`

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

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

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

Add the following custom property:

Name: `webSphereDefaultIsolationLevel`

Value: `1`

Datatype: `Integer`

Oracle

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

    Enter the driver URL by using the format that is shown. Unica applications do not allow the use of Oracle's RAC (Real Application Cluster) format for JDBC connections.

DB2®

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

Add the following custom property:

Name: `webSphereDefaultIsolationLevel`

Value: `2`

Datatype: `Integer`

MariaDB

- Database type: User_define
- Implementation class name = org.mariadb.jdbc.MySQLDataSource
- Driver: mariadb-java-client-2.5.1.jar

  JNDI custom properties
- Component-managed authentication alias = Select the authentication details for user
- Mapping-configuration alias = WSLogin
- portNumber = 3306
- relaxAutoCommit=true
- databaseName = <DATABASE NAME>
- serverName = the host name of the MariaDB server
- user = the user name of the MariaDB server
- password = the password associated with the user name

Note: Use:

- MariaDB ODBC connector version 3.1.6 for Windows and Linux
- MariaDB ODBC connector version 3.1.9 for SUSE operating system

MariaDB ODBC connector versions

Microsoft Windows	**Maria DB ODBC Connector**: 3.1.6
	Download link:
	https://downloads.mariadb.com/Connectors/odbc/conne ctor-odbc-3.1.6/mariadb-connector-odbc-3.1.6-win64.msi
RHEL	**Maria DB ODBC Connector**: 3.1.6
	Download link:

	https://downloads.mariadb.com/Connectors/odbc/connector-odbc-3.1.6/mariadb-connector-odbc-3.1.6-ga-rhel7-x86_64.tar.gz
SUSE	**Maria DB ODBC Connector**: 3.1.9 **Download link**: https://downloads.mariadb.com/Connectors/odbc/connector-odbc-3.1.9/mariadb-connector-odbc-3.1.9-sles123-amd64.tar.gz

MariaDB ODBC driver level configurations

Example for Microsoft Windows: Set the following configuration in ODBC Driver Manager following the **Statements** parameter:

```
SET SQL_MODE='PIPES_AS_CONCAT,ANSI_QUOTES,IGNORE_SPACE,NO_KEY_OPTIONS';
```

Example for SUSE/Linux: Set the following configuration in `odbc.ini`:

```
[<CampaignSystem>]
Driver=/usr/local/mariaDBConnector/lib/libmaodbc.so
DATABASE=<DATABASE_NAME>
DESCRIPTION=MariaDB
SERVER=<DATABASE_SERVER>
UID=<USER_NAME>
PASSWORD=<PASSWORD>
PORT=3306
InitStmt=SET
SQL_MODE='PIPES_AS_CONCAT,ANSI_QUOTES,IGNORE_SPACE,NO_KEY_OPTIONS';
```

> ⚠️ **Attention:** Use MariaDB database user name. Do not use `root` and `unica*03` as username and password for `UA_SYSTEM_TABLES` datasource.

MariaDB JAVA Client (JDBC Client): Download the version 2.4.0 client using the following link: https://mariadb.com/kb/en/library/about-mariadb-connector-j/

> 📝 **Note:** For AIX, we do not support MariaDB as System and User Database.

PostgreSQL

- Database type: User_define
- Implementation class name = org.postgresql.ds.PGConnectionPoolDataSource
- Driver: postgresql-42.5.4.jar

JNDI custom properties

- Component-managed authentication alias = Select the authentication details for user
- Mapping-configuration alias = WSLogin
- portNumber = 5432
- databaseName = <DATABASE NAME>
- serverName = the host name of the PostgreSQL server
- user = the user name of the PostgreSQL server
- password = the password associated with the user name

JBoss

Specify the native library path of the database driver JAR file on your server. For example: `db2jcc4.jar/ojdbc8.jar/sqljdbc-6.4.0.jre8.jar`.

Use the following values if your application server is JBoss:

SQLServer

- Database Driver: Microsoft MS SQL Server Driver (Type 4) Versions: 2014, 2016 SP1, 2017
- Default port: 1433
- Driver class: `com.microsoft.sqlserver.jdbc.SQLServerDriver`
- Driver URL: `jdbc:sqlserver://<your_db_host>[\`
  `\<named_instance>]:<your_db_port>;databaseName=<your_db_name>,valid-connection-`
  `checker-class-name`
  `=org.jboss.jca.adapters.jdbc.extensions.mssql.MSSQLValidConnectionChecker`

For example :/subsystem=datasources/data-source=UnicaPlatformDS:add(jndi-name="java:/UnicaPlatformDS",connection-url="jdbc:sqlserver://localhost:1433;databaseName=plat11",driver-name=sql,user-name=sa,password=test1234,valid-connection-checker-class-name="org.jboss.jca.adapters.jdbc.extensions.mssql.MSSQLValidConnectionChecker")

Oracle

- 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>
valid-connection-checker-class-name=valid-connection-checker-class-name=
"org.jboss.jca.adapters.jdbc.extensions.oracle.OracleValidConnectionChecker"
```

For example:/subsystem=datasources/data-source=UnicaPlatformDS:add(jndiname=" java:/UnicaPlatformDS",connection-url="jdbc:oracle:// localhost:1521`;databaseName=plat11",driver-name=oracle,username= plat,password=test1234,valid-connection-checker-class-name="org.jboss.jca.adapters.jdbc.extensions.oracle.OracleValidConnectionChecker")

DB2

- Driver: JCC 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>
valid-connection-checker-class-name=
"org.jboss.jca.adapters.jdbc.extensions.db2.DB2ValidConnectionChecker"
```

For example:/subsystem=datasources/data-source=UnicaPlatformDS:add(jndiname=" java:/UnicaPlatformDS",connection-url="jdbc:db2:// localhost:50000;databaseName=plat11",driver-name=db2,username= plat,password=test1234,valid-connection-checker-class-name="org.jboss.jca.adapters.jdbc.extensions.db2.DB2ValidConnectionChecker"

MariaDB

- Driver: `MariaDBDriver` (this is the mariadb jar registered with mariadb)
- Default port: `3306`
- Driver class: `org.mariadb.jdbc.MariaDbDataSource`
- Driver URL:

```
jdbc:mariadb://<your_db_host>:<your_db_port>/<your_db_name>jdbc:db2:
//<your_db_host>:<your_db_port>/<your_db_name>
```

PostgreSQL

- Database type: User_define
- Implementation class name = org.postgresql.ds.PGConnectionPoolDataSource
- Driver: postgresql-42.5.4.jar

JNDI custom properties

- Component-managed authentication alias = Select the authentication details for user
- Mapping-configuration alias = WSLogin
- portNumber = 5432
- databaseName = <DATABASE NAME>
- serverName = the host name of the PostgreSQL server
- user = the user name of the PostgreSQL server
- password = the password associated with the user name

Chapter 4. Installing Unica Centralized Offer Management

You must run the Unica installer to start the installation of Centralized Offer Management. The Unica installer starts the product installer during the installation process. Make sure that the Unica installer and the product installer are saved at the same location.

Each time that you run the Unica suite installer, you must first enter database connection information for the Platform system tables. When the installer starts, you must enter the required information for Campaign.

> ✏️ **Note:**

> - From V12.1.5 onwards, we can clean install Centralized Offer Management to the latest version i.e. 12.1.7 without installing the base version. If you have upgraded Platform and Campaign to 12.1.7, then you can directly install Centralized Offer Management to the same version without install the base version 12.1.0 first.
> - The Unica installer requires information about Platform.
> - After completing installation, you can create an EAR file for your product, and you can install the reports package for your product. Creating the EAR file and installing the reports package are not mandatory actions.

> ✏️ **Note:** To launch the installers on Windows 2019 and Windows 2022, server please set parameter - **SET JAVA_TOOL_OPTIONS="-Dos.name=Windows 7"** - on command prompt and then launch the Installers from the same command prompt.

> ⚠️ **Important:** Before you install Centralized Offer Management, make sure that the available temporary space on the computer where you install Campaign is more than three times the size of the Centralized Offer Management installer.

Installation files

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

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

Table 5. Installation files

Operating system	Installation file
Windows™: GUI and console mode	`Unica_CentrOM_12.1.7.0_win.exe`, where *Product* is the name of your product, *12.1.7.0* is the version number of your product, and Windows™ 64-bit is the operating system on which the file must be installed.
UNIX™: X Window System mode	`Unica_CentrOM_12.1.7.0_linux.bin`, where *Product* is the name of your product, and *12.1.7.0* is the version number of your product.
UNIX™: Console mode	`Unica_CentrOM_12.1.7.0_linux.bin`, where *Product* is the name of your product, and *12.1.7.0* is the version number of your product. This file can be used for installation on all UNIX™ operating systems.

Installing Unica Centralized Offer Management in GUI mode

For Windows™, use the GUI mode to install Centralized Offer Management. For UNIX™, use the X Window System mode to install Centralized Offer Management.

Before you begin

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

Make sure that the Unica installer and the Centralized Offer Management installers are in the same directory on the computer where you want to install Centralized Offer Management.

To install Centralized Offer Management using the GUI mode (for Windows™) or the X Window System mode (for UNIX™):

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

   Table 6. Unica installer GUI

Window	Description
Introduction	This is the first window of the Unica suite installer. You can open the Unica Centralized Offer Management installation and upgrade guides from this window. Click **Next** to go to the next window.
Response Files Destination	Click the **Generate Response File** check box if you want to generate response files for your product. Response files store the information that is necessary for the installation of your product. You can use response files for an unattended installation of your product. Click **Choose** to browse to a location where you want to store the response files. Click **Next** to go to the next window.
HCL Unica Products	In the **Install Set** list, select **Custom** to select the products that you want to install. In the **Install Set** area, you can see all the products whose installation files are in the same directory on your computer. In the **Description** field, you can view the description of the product that you select in the **Install Set** area. Click **Next** to go to the next window.
Installation Directory	Click **Choose** to browse to the directory where you want to install Unica. Click **Next** to go to the next window.
Select Application Server	Select one of the following application servers for the installation: • IBM® WebSphere® • Oracle WebLogic • JBoss • Tomcat Click **Next** to go to the next window.
Platform Database Type	Select the appropriate Unica Platform database type. Click **Next** to go to the next window.
Platform Database Connection	Enter the following information about your database: • Database host name • Database port • Database name or System ID (SID) • Database username • Database password Click **Next** to go to the next window.

Window	Description
	⚠️ **Important:** If Unica products are installed in a distributed environment, you must use the machine name rather than the IP address, in the navigation URL, for all the applications in the suite. Also, if you are using a clustered environment and choose to use the ports that are different than the default ports `80` or `443` for deployment, do not use a port number in the value of this property.
Platform Database Connection	Review and confirm the JDBC connection. Click **Next** to go to the next window.
Preinstallation Summary	Review and confirm the values that you added during the installation process. Click **Install** to start the installation process. The Unica Platform installer opens. If a previous instance of Unica Platform exists, the instance is upgraded to the current version. If a previous instance of Unica Platform does not exist, Unica Platform is installed.

4. Follow the instructions on the Unica Platform installer to install or upgrade Platform. For more information, see *Unica Platform Installation Guide*.

5. In the **Installation Complete** window, click **Done**.
   Result

   The Unica Platform installation is complete and the Unica Campaign installer opens. For more information, see *Unica Campaign Installation Guide*.

6. After Unica Campaign installation is completed, Unica Centralized Offer Management installer opens.

7. Use the information in the following table to navigate the Unica Centralized Offer Management installer.

Table 7. Unica Centralized Offer Management installer GUI

Window	Description
Introduction	This is the first window of the Centralized Offer Management installer. You can open Unica Centralized Offer Management installation and upgrade guides from this window. Click **Next** to go to the next window.
License Agreement	Carefully read the agreement. Use **Print** to print the agreement. Click **Next** after you accept the agreement.
Installation Directory	Click **Choose** to browse to the directory where you want to install Centralized Offer Management. Click **Next** to go to the next window.
Components	Select **J2EE Application** and click **Next** to go to the next window.

Window	Description
	If you wish to take a backup of the previous install, select the checkbox and provide a location to take the backup.
	Click **Next**.
Unica Campaign Database Type	Select a database on which Unica Campaign is setup and click **Next** to go to the next window.
	📝 **Note:** Do no select the database type "Informix" during installation of 12.1.0, as it is not functional.
Unica Campaign Database Connection	Enter the following details for the Campaign database:
	• Database host name
	• Database port
	• Database system ID (SID)
	• Database username
	• Password
	⚠ **Important:** If Unica products are installed in a distributed environment, you must use the machine name rather than the IP address, in the navigation URL, for all the applications in the suite. Also, if you are using a clustered environment and choose to use the ports that are different than the default ports `80` or `443` for deployment, do not use a port number in the value of this property.
	Click **Next** to go to the next window.
JDBC connection	Review and confirm the JDBC connection.
	Click **Next** to go to the next window.
Unica Centralized Offer Management Connection Settings	Enter the following connection settings:
	• Network domain name
	• Host name
	• Port number
	Select the **Use secure connection** check box if necessary.
	Click **Next** to go to the next window.
Pre-Installation Summary	Review and confirm the values that you added during the installation process.
	Click **Install** to start the installation process.
	The Centralized Offer Management installer opens.
Installation Complete	Click **Done** to close the Platform installer and go back to the Unica installer.

8. In the **Installation Complete** window, click **Done** to exit the Centralized Offer Management installer and go back to the Unica installer.
9. Follow the instructions on the Unica installer to finish installing Unica Centralized Offer Management.
Use the information in the following table to take the appropriate actions on each window in the Unica installer.

Table 8. Unica installer GUI

Window	Description
Deployment EAR file	Specify whether you want to create an enterprise archive (EAR) file to deploy your Unica products.
	Click **Next** to go to the next window.
Package EAR file	You can see this window if you select **Create an EAR file for deployment** in the **Deployment EAR file** window.
	Select the applications that you want to package in the EAR file.
EAR file details	Enter the following information for your EAR file: • Enterprise application identifier • Display name • Description • EAR file path
EAR file details (continued)	Select **Yes** or **No** to create an additional EAR file. If you select **Yes**, you must enter the details for the new EAR file.
	Click **Next** to complete the installation of your product.
Deployment EAR file	Specify whether you want to create another EAR file to deploy your Unica products.
	Click **Next** to go to the next window.
Installation Complete	This window provides the locations of the log files that are created during installation.
	Click **Previous** if you want to change any installation details.
	Click **Done** to close the Unica installer.

Installing Unica Centralized Offer Management in console mode

The console mode allows you to install Unica Centralized Offer Management command-line window. You can select various options in the command-line window to complete tasks such as selecting the products to install or selecting the home directory for the installation.

Before you begin

Before you install Unica Centralized Offer Management, ensure that you have configured the following.

- An application server profile
- A database schema

To display the installer screens correctly in console mode, configure your terminal software to support `UTF-8` character encoding. Other character encodings, such as `ANSI`, do not render the text correctly, and some information is not readable with these encodings.

1. Open a command-line prompt window and navigate to the directory where you have saved the Unica installer and the Interact installer.
2. Complete one of the following actions to run the Unica installer.
   Choose from:
   - For Windows™, enter the following command:

     `Unica_installer_full_name` -i console

     For example, HCL_Unica_Installer_12.1.7.0_win.exe -i console
   - For UNIX™, invoke the `HCL_Unica_installer_full_name`.sh file.

     For example: HCL_Unica_Installer_12.1.7.0.sh
3. Run the Unica installer file.

   Example

   For example: HCL_Unica_Installer_12.1.7.0.sh
4. Follow the directions that are displayed in the command-line prompt. Use the following guidelines when you must select an option in the command-line prompt:
   - The default options are defined by the symbol [X].
   - To select or clear an option, type the number that is defined for the option, and then press `Enter`.

   Example

   For example, suppose that the following list displays the components that you can install:
     1 [X] Unica Platform
     2 [X] Unica Campaign
     3 [X] Unica Centralized Offer Management
5. The Unica installer launches the Unica Platform installer during the installation process. Follow the instructions in the command-line prompt window of the Platform installer.
6. After you enter `quit` in the Unica Centralized Offer Management installer command-line prompt window, the window shuts down. Follow the instructions in the command-line prompt window of the Unica installer to complete the installation of Unica Centralized Offer Management.

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

Installing Unica Centralized Offer Management in silent mode

Use the unattended or silent mode to install Unica Centralized Offer Management multiple times.

Before you begin

Before you install Centralized Offer Management, make sure that you have configured the following elements:

- An application server profile
- A database schema

About this task

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

- Using the sample response files as a template for creating your response files. The sample response files are included with your product installers in the `ResponseFiles` compressed archive. For more information about sample response files, see Sample response files on page 23.
- Running the product installers in the GUI (Windows™) or X Window System (UNIX™) mode or the console mode before you install the product in the silent mode. One response file is created for the Unica suite installer, and one or more response files are created for your product installer. The files are created in the directory that you specify.

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

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

- In the directory where the Unica installer is saved
- In the home directory of the user who installs the product

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

Use the following command for Windows™:

- `HCL Unica_installer_full_name` -i silent

  Example

  For example:

  HCL_Unica_Installer_12.1.7.0_win.exe -i silent

Use the following command for Linux™:

- `HCL_Unica_installer_full_name _operating_system` .bin -i silent

  Example

  For example:

```
./HCL_Unica_Installer_12.1.7.0_linux.bin -i silent -DUNICA_REPLAY_READ_DIR=
/opt/HCL/Silent12 -f /opt/HCL/Silent12/installer.properties
```

Sample response files

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

Example for Microsoft Windows OS-specific sample response file

The following is an example for a sample response file:

```
#Choose Install Folder
#--------------------
USER_INSTALL_DIR=<INSTALLATION_DIRECTORY>/CentralizedOffer

#Choose Unica Centralized Offer Management Components
#---------------------------------------------------
CHOSEN_FEATURE_LIST=J2EEApp
CHOSEN_INSTALL_FEATURE_LIST=J2EEApp
CHOSEN_INSTALL_SET=Typical

#Backup Folder Destination
#-------------------------
UNICA_ENABLE_BACKUP_GUI=0
UNICA_BACKUP_DESTINATION=<BACKUP_DESTINATION>
UNICA_ENABLE_BACKUP=No

#Unica Campaign Database Type
#----------------------------
UNICA_COM_DB_TYPE_INPUT=\"\",\"SQL Server\",\"\",\"\",\"\"
UNICA_COM_DB_TYPE_INPUT_1=
UNICA_COM_DB_TYPE_INPUT_2=SQL Server
UNICA_COM_DB_TYPE_INPUT_3=
UNICA_COM_DB_TYPE_INPUT_4=
UNICA_COM_DB_TYPE_INPUT_5=
UNICA_COM_DB_TYPE_INPUT_BOOLEAN_1=0
UNICA_COM_DB_TYPE_INPUT_BOOLEAN_2=1
UNICA_COM_DB_TYPE_INPUT_BOOLEAN_3=0
UNICA_COM_DB_TYPE_INPUT_BOOLEAN_4=0
UNICA_COM_DB_TYPE_INPUT_BOOLEAN_5=0

#Unica Campaign Database Connection
#----------------------------------
UNICA_COM_DB_HOSTNAME=<CAMPAIGN_DATABASE_HOST_NAME>
UNICA_COM_DB_PORT=<CAMPAIGN_DATABASE_PORT>
UNICA_COM_DB_DBNAME=<CAMPAIGN_DATABASE_SID>
UNICA_COM_DB_USERNAME=<CAMPAIGN_DATABASE_USER_SCHEMA>
UNICA_COM_DB_PASSWORD=<CAMPAIGN_DATABASE_USER_SCHEMA_PASSWORD>

#JDBC Connection
#---------------
UNICA_COM_DB_JDBC_CONNECTION_STRING=jdbc:sqlserver://<CAMPAIGN_DATABASE_HOST_NAME>
:<CAMPAIGN_DATABASE_PORT>;databaseName=<CAMPAIGN_DATABASE_SID>
```

```
#Default Locale
#--------------
UNICA_LOCALE_ENUS=1
UNICA_LOCALE_FRFR=0
UNICA_LOCALE_DEDE=0
UNICA_LOCALE_ITIT=0
UNICA_LOCALE_JAJP=0
UNICA_LOCALE_KOKR=0
UNICA_LOCALE_PTBR=0
UNICA_LOCALE_RURU=0
UNICA_LOCALE_ZHCN=0
UNICA_LOCALE_ESES=0
UNICA_LOCALE_ZHTW=0
UNICA_LOCALE_INPUT_CONSOLE=\"English\",\"\",\"\",\"\",\"\",\"\",\"\",\"\",\"\",\"\",\"\"

#Unica Centralized Offer Management Connection Settings
#------------------------------------------------------
UNICA_DOMAIN_NAME=<DEPLOYMENT_SERVER_DOMAIN_NAME>
UNICA_PRODUCT_SERVER=<DEPLOYMENT_SERVER_HOST_NAME>
UNICA_PRODUCT_SERVER_PORT=<DEPLOYMENT_SERVER_PORT>
UNICA_PRODUCT_SERVER_HTTPS_GUI=0
UNICA_PRODUCT_SERVER_HTTPS_CONSOLE=\"\",\"No\"

#Unica Centralized Offer Management Secure Connection
#-----------------------------------------------------
UNICA_PRODUCT_SERVER_HTTPS=No

#Install
#-------
-fileOverwrite_C\:\\ExampleCOM\\CentralizedOffer\\version.txt=Yes
```

Installation prompt windows

During the installation of Unica Centralized Offer Management, several prompt windows display. After you enter the required information, prompt windows display your responses and require a confirmation before you continue. Prompt windows give you the opportunity to make corrections, if needed.

For reference, an example of the prompts that display during installation on a UNIX™ server using console mode follows. Be sure to read and follow the instructions that display during your actual installation.

Use the following example to help you gather required information before you begin your installation and for reference during your installation.

Table 9. Example installation prompts and responses

Prompt	Response
`-bash-4.0S`	Initial prompt. Supply the name of the master installer file and any variables for the database setup utility that you want to use for the installation.
`Choose Locale`	Supply a number to choose one of the listed languages. To use the default locale, `2- English`, press Enter.
`Introduction`	If a previous version of the product is installed, an upgrade is initiated.

Table 9. Example installation prompts and responses (continued)

Prompt	Response
	If the same version of the product is installed, proceeding drops all tables and data.
`Response Files Generation`	Supply a number to choose whether to generate response files for use in an unattended installation. If you generate response files, you can supply a destination path.
`Choose Product Features`	A numbered list of features displays. Features with a check mark `[x]` are selected for installation, features with no check mark `[ ]` are not selected. To change the selections, supply numbers to switch from selected to cleared (or vice versa) by using a comma-separated list, then press Enter.
	For example, you see this list of features:

	<pre>1- Unica Platform
	2- Unica Centralized Offer Management</pre>

	To install Unica Platform only, supply `2` and press Enter.
Master (Unica Platform) installation	
`Installation Directory`	
`Select Application Server`	
`Platform Database Type`	Supply information for the Unica Platform system table database.
`Platform Database Host Name`	
`Platform Database Port`	
`Platform Database Name/System ID (SID)`	
`Platform Database User Name`	
`Platform Database Password`	
`JDBC Connection`	
`JDBC Driver Classpath`	
Product-specific (Unica Centralized Offer Management) installation	
`Introduction`	For each product feature you chose to install, the specific product name displays followed by the reinstallation warning.
`Installation Directory`	
`Campaign Database Configuration`	Supply a number to choose automatic or manual.
	• Select the database used in Unica Campaign.
	• Configure the requested values for Campaign database.

Table 9. Example installation prompts and responses (continued)

Prompt	Response
`JDBC Connection`	Configure the path for JDBC connection
`Centralized Offer Management Settings`	Configure connection setting values like Network domain, Host name, and Port number.
Deployment EAR file	Supply a number to choose whether to create an enterprise archive (EAR) file

Creating an EAR file after running the installer

You can create an EAR file after you install Unica products. You might do this to create an EAR file with a desired combination of products.

Before you begin

- If you are installing Unica for the first time, ensure that you have made all the required configurations for Centralized Offer Management. For more information, see Configuration of Unica Centralized Offer Management after deployment on page 41.
- Run the installer in console mode from the command line.

About this task

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

1. If this is the first time you are running the installer in console mode, make a backup copy of the installer's `.properties` file for each of your installed products.
    - Each product installer creates one or more response files with a `.properties` extension. These files are in the same directory where you placed the installers. Be sure to back up all files with the `.properties` extension, including the `installer_<product initials><product version number>.properties` files and the file for the installer itself, which is named `installer.properties`.

        For example, the properties files for Unica Platform `installer_ump12.1.7.0.properties` and the properties file for Unica Campaign `installer_uo12.1.7.0.properties`.
    - If you plan to run the installer in unattended mode, you must back up the original `.properties` files, because when the installer runs in unattended mode, it clears these files. To create an EAR file, you need the information that the installer writes in the `.properties` files during the initial installation.
2. Open a command window and change directories to the directory that contains the installer.
3. Run the installer executable with this option:

    `-DUNICA_GOTO_CREATEEARFILE=TRUE`

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

    The installer wizard runs.

4. Follow the instructions in the wizard.

5. Before you create more EAR files, overwrite the `.properties` file or files with the backups you created before you ran in console mode for the first time. **Please note EAR is not supported for Tomcat application server.**

Custom code generators

If you are using a custom offer code generator (other than `uacoffercodegen` that is bundled with the Centralized Offer Management product), copy these custom code generators, along with all the related `DLL`s / `SO`s / `EXE`s, etc, to the location `<CentralizedOffer_Installation_path>/bin`.

If you have configured a different location for the code generators at `Affinium|Offer|partitions|partition<n>|offerCodeGenerator`, place the code generators in the location configured at `Affinium|Offer|partitions|partition<n>|offerCodeGenerator`.

Chapter 5. Custom validation and offer code plugin configuration

From version 12.1.0.3 onwards, Unica Centralized Offer Management supports offer validation and code generation using Unica Campaign's Plugin Developer's Kit (PDK). For more information on the development and use of the plugin, see *Unica Campaign Validation PDK Guide*.

About this task

If you have already configured the plugin in Unica Campaign, and are using the plugin for Campaign's offers, complete the following steps to use the same plugin in Centralized Offer Management:

1. Before copying the plugin, or plugins, developed in Campaign, take a backup of the validation folder in the `<Unica CentralizedOffer_home>\devkits\` location.
2. Copy all Campaign plugins from the `<Unica Campaign_home>\devkits\validation\` folder to `<Unica CentralizedOffer_home>\devkits\validation\` folder.

    a. If the Campaign plugins reside in a different folder, copy the plugins from that folder.

    b. If the Campaign plugins reside in a different folder, complete the following steps:
      • Navigate to **Settings > Configuration**
      • From the **Configuration categories** panel, expand **offer**.
      • Update the configurations in `offer | partitions | partition <n> | validation`. For more information, see *Unica Centralized Offer Management Administrator's Guide*.
      • Update the configurations in `offer | partitions | partition<n> | offerCodeGenerator`. For more information, see *Unica Centralized Offer Management Administrator's Guide.*
3. Restart the Centralized Offer Management application.

Chapter 6. Deploying Unica Centralized Offer Management

There are general guidelines for deploying Unica Centralized Offer Management on WebSphere® and WebLogic.

If you created an EAR file after running the installer and your EAR file includes any other products, you must follow all the deployment guidelines detailed in the individual install guides for the products included in the EAR file in addition to those listed in this chapter.

It is assumed that you know how to work with your web application server. Consult your web application server documentation for details about things like how to use the Administration console.

Configuration of JVM parameters for Unica products

You must configure the following JVM parameters in the Unica porducts.

Table 10. Unica Products and the JVM Parameters to be Configured

Unica Product Name	JVM Parameters
Unica Campaign	`-DUNICA_PLATFORM_CACHE_ENABLED=true` `-Dcampaign.log4j.async=true` `-Dcom.sun.management.jmxremote` `-Dcom.sun.management.jmxremote` `-Dcom.sun.management.jmxremote.port=1007` `-Dcom.sun.management.jmxremote.ssl=false` `-Dcom.sun.management.jmxremote.authenticate=false` `-Dcom.sun.management.jmxremote.password.file=../conf/jmxremote.password` `-Dcom.sun.management.jmxremote.access.file=../conf/jmxremote.access` `-DUNICA_GOTO_CREATEEARFILE=TRUE` `-Dfile.encoding=UTF-8` `-Dclient.encoding.override=UTF-8` `-DUNICA_GOTO_CREATEEARFILE=TRUE` `-Dclient.encoding.override=UTF-8` `-Djboss.as.management.blocking.timeout=3600` SET SSL_OPTIONS=-Djavax.net.ssl.keyStoreType="JKS"

Table 10. Unica Products and the JVM Parameters to be Configured (continued)

Unica Product Name	JVM Parameters

	`-Djavax.net.ssl.trustStore="C:\security\myTrustStore.jks"` `-Djavax.net.ssl.trustStorePassword=myPassword` Configuring the `ACOOptAdmin` tool (`ACOOptAdmin.sh` (UNIX) or `ACOOptAdmin.bat` (Windows) file) `-Djavax.net.ssl.keyStoreType=keyStoreTypeValue` `-Djavax.net.ssl.keyStore=<keyStoreValue>` `-Djavax.net.ssl.keyStorePassword=<keyStorePasswordValue>` `-Djavax.net.ssl.trustStore=<trustStoreValue>` `-Djavax.net.ssl.trustStorePassword=<trustStorePasswordValue>` `-Djava.awt.headless=true` `-Dcampaign.deliveretl.disabled=true` `-Dcampaign.interactetl.disabled=true` `-Dcampaign.journeyetl.disabled=false` `-Dcampaign.journeyetl.disabled=true` `EMAIL_TLS_ENABLED`
	
	`EMAIL_SSL_TRUST_ENABLED`
	
	`SCH_ASYNCH_EXECUTION_ENABLED`

Unica Audience Central	`-DAUDIENCE_CENTRAL_HOME=<Install_Base_DIR>/AudCentral`
Unica Contact Central	`CONTACTCENTRAL_HOME` `UNICA_PLATFORM_HOME`
Unica Content Integration	`-DASSET_PICKER_HOME` `-DUNICA_PLATFORM_HOME`
Unica Deliver	`-Dcampaign.deliveretl.disabled=true`
Unica Interact	**Interact design time** The following are the JVM parameters for Interact design time: `INTERACTDT_HOME` `Interact.UsernameToAlwaysDeployFor`

Table 10. Unica Products and the JVM Parameters to be Configured (continued)

Unica Product Name	JVM Parameters
	• `com.unicacorp.interact.deliver.templateTimeout` • `DeploymentServletParameterEncoding` • `com.unicacorp.interact.flexoffers.defaultDateTimeForm at` • `com.unicacorp.interact.flexoffers.defaultDateFormat` • `com.unicacorp.Campaign.interact.offermapping.batchsiz e` • `com.unicacorp.Campaign.interact.offermapping.service. synctimeout` • `com.unicacorp.interact.cacheTTL` • `com.unicacorp.interact.cacheRefreshIntervalInMin` • `com.unicacorp.interact.enableDTPerfLogging` • `com.unicacorp.interact.compressAPIResponse` • `ignoreSpecialCharacterValidator` • `Interact.CustomStringDelimiter` • `com.unicacorp.interact.playback.maxFilteredIdsCount` • `com.unicacorp.interact.playback.APITimeoutInSecs` **Interact run time** The following are the JVM parameters for Interact run time: • `INTERACT_HOME` • `com.unicacorp.interact.deliver.templateTimeout` • `INBOUND_GATEWAYS_USING_MAPPING_FROM_PROPERTIES` • `com.hcl.interact.http.proxyProtocol` • `com.hcl.interact.http.proxyHost` • `com.hcl.interact.http.proxyPort` • `com.hcl.interact.http.proxyUsername` • `com.hcl.interact.http.proxyPassword` • `interact.jmx.monitoring.port` • `interact.offerserving.maxOfferAllocationInMemoryPerIn stance` • `interact.offerserving.maxDistributionPerIntervalPerIn stanceFactor` • `interact.ignitePort` • `com.unicacorp.interact.chDupeCheckLimit` • `com.unicacorp.interact.rhDupeCheckLimit` • `com.unicacorp.interact.chSuppressDupe` • `com.unicacorp.interact.rhSuppressDupe`

Table 10. Unica Products and the JVM Parameters to be Configured (continued)

Unica Product Name	JVM Parameters
	`com.unicacorp.interact.testclient.nullValue` `interact.ehcache.config` `interact.api.dateFormat` `com.hcl.interact.testrun.rowlimit` `Interact.DisableExceptionStackTracesInMacros` `com.unicacorp.interact.enableDetailStats` `com.unica.interact.deployment.timeoutInSecs` `com.ibm.interact.instance.name` `com.unicacorp.interact.invalidPaths` `interact.XSessResponseConsumerManager.generateOnlyOne Response` `tryToPreserveInexactFloatValues` `com.unicacorp.interact.propertyRefreshInterval` `com.unicacorp.interact.scheduledTasksProcessInterval` `com.unicacorp.interact.eventpatterns.parallelism` `com.unicacorp.interact.eventpatterns.restartRetries` `com.unicacorp.interact.eventpatterns.evaluateTimeoutM illi` `com.unicacorp.interact.eventpatterns.restartRetryDela yInSec` `Interact.advisoryMessageEncodingOverrides` `com.unica.interact.api.insertSessionIDAsCookie` `com.unica.interact.api.SessionIDCookieName` `InteractMsgCode` `com.ibm.interact.triggeredmessage.enableJMSConsumer` `com.unicacorp.interact.maxStringLengthInFormatMacro` `ContinueEvaluatingBranchAndAdvOptTreatmentLogicDespit eExMessageList` `DisableDecisionProcessBoxAndAdvOptTreatmentLogging` Valid values are `True` or `False`. The default value is `False`. If you set the value to `False`, when evaluating the expressions of each branch, if the system encounters any errors, it logs the errors. `Interact.DPB.MuffleErrorsForMutuallyExclusiveBranches WithNullValues` Valid values are `True` and `False`. The default value is `False`. If you set the value to `False` and if the value of `-DDisableDecisionProcessBoxAndAdvOptTreatmentLogging`

Table 10. Unica Products and the JVM Parameters to be Configured (continued)

Unica Product Name	JVM Parameters
	is also set to `False`, during the evaluation of the expressions of each branch, of a Decision process box whose branches are mutually exclusive, if the system encounters any errors, it logs the errors. Otherwise, the system logs the errors as debug.
	• `TwoDigitYearStartDate`
	• `Interact.enableTwoDigitYearFix`
	• `com.ibm.interact.evpatetl.conf`
	• `com.unicacorp.interact.minTreatmentsPerThread`
	• `com.unicacorp.interact.maxTreatmentPoolSize`
	• `CircuitBreaker.processTimeoutMillis`
	• `com.unicacorp.interact.event.asyncTimeoutMSec`
	• `com.unicacorp.interact.eventActionTimeout`
	• `Interact.HTMI.Enabled`
	• `Interact.HTMI.MaxRequestDurationInMs`
	• `Interact.HTMI.RecordIndividualAPIs`
	• `Interact.HTMI.MaxStartSessionDurationInMs`
	• `Interact.HTMI.MaxGetOffersDurationInMs`
	• `Interact.HTMI.MaxPostEventDurationInMs`
	• `Interact.HTMI.MaxGetProfileDurationInMs`
	• `Interact.HTMI.LogErrorsEveryNthTime`
	• `Interact.HTMI.UseMillisecondTimers`
	• `Interact.HTMI.Debug`
	• `com.unicacorp.interact.suppressWarningOnAnonymousUser`
	• `com.hcl.interact.eventpatterns.printPatternAction`
	• `com.hcl.interact.eventpatterns.eagerPersist`
	• `com.ibm.interact.triggeredmessage.addPerfData`
	• `com.unicacorp.interact.learning.disableAggregator`
	• `com.unicacorp.interact.learning.disableDeletion`
	• `com.unicacorp.interact.learning.ignoreInterval`
	• `interact.services.loader.saveLoaderFiles`
	• `ConvertEveryNULLAttributeValueToAJEPNullConstant`
	• `includeJoinInfo`
	• `com.unicacorp.interact.deployment.reloadTimeout`
	• `com.ibm.interact.lockTimeWarningThreshold`
	• `com.unicacorp.interact.cache.maxWaitTime`
	• `DEFAULT_PERSISTENCE_PROVIDER`
	• `com.unicacorp.interact.playback.purgeBatchSize`

Table 10. Unica Products and the JVM Parameters to be Configured (continued)

Unica Product Name	JVM Parameters
	📝 **Note:** We have removed the JVM parameter `interact.runtime.instance.name`. Use the JVM parameter `com.ibm.interact.instance.name` to set the name of the Interact run-time instance.
Unica Journey	
Unica Plan	• `-Dplan.log4j.config=<plan_home>/conf/plan_log4j.xml` • `-Dplan.log4j.async=true` • `-Dplan.home=<plan_home>` • `-Dplan.slow.query.threshold=<value in milliseconds>` (optional) • `-Dplan.slow.query.show.stack.trace=true` (optional) • `-Dcampaign.https.port=<campaign's https port>` If Plan communicates with Campaign over `https`, and if Campaign is configured to run on the `https` port other than 8443, add this system property to the JVM arguments of the Plan application's JVM.
Unica Platform	• `-DENABLE_PLATFORM_LOG4J_XML_LOGGING=TRUE` • `-DENABLE_PERSISTENT_NAMEID_FORMAT=TRUE` • `-DUNICA_PLATFORM_HOME=<platform_home_directory_path>`
Unica Centralized Offer Management	• `-DOFFER_HOME=<Install_Base_DIR>/CentralizedOffer` • `-DUNICA_PLATFORM_CACHE_ENABLED=false` • `-DUNICA_PLATFORM_LOCAL_CACHE_ENABLED=false` • `-DOffer.isDebug=false` • `-Dlog4j2.formatMsgNoLookups=true`
Unica Segment Central	• `-DSEGMENT_CENTRAL_HOME=<Install_Base_DIR>/SegCentral`

Deploying Unica Centralized Offer Management on WebSphere

You can deploy the Unica Centralized Offer Management application from a WAR file or an EAR file on the WebSphere® Application Server (WAS).

Before you begin

Consider the following points before you deploy Unica Centralized Offer Management on WebSphere:

- Verify that your version of WebSphere® meets the requirements that are described in the *Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs or upgrades.
- You use the WebSphere® Integrated Solutions console to configure your WebSphere® Application Server. The steps that follow provide guidance for setting specific controls.

Note: Different versions of WebSphere® Application Server present user interface controls in varying sequences and with alternative labels.

About this task

Complete the following steps to set up the environment for deploying Unica Centralized Offer Management:

1. Configure the JVM: On the **Application servers > <server> > Process definition > Java Virtual Machine** form, identify the Classpath then add the following entries as Generic JVM arguments, separated by a space:
     - `-DOFFER_HOME=<UNICA_HOME>\<Offer_Home>`

       where `<Unica_Home>` is the path to the top-level HCL directory and `<Offer_Home>` is the path to the directory where you installed Unica Centralized Offer Management. Typically, this path is `<UNICA_HOME>/CentralizedOffer`.
     - For your installation to support non-ASCII characters, example for Portuguese or for locales that require multi-byte characters, add the following arguments to Generic JVM Arguments at the server level:

       ```
       -Dfile.encoding=UTF-8
       -Dclient.encoding.override=UTF-8
       ```
     - set `"JAVA_OPTS=%JAVA_OPTS% -DUNICA_PLATFORM_CACHE_ENABLED=true`
     - For the Oracle database, set the following system property:

       ```
       -Doracle.jdbc.J2EE13Compliant=true
       ```
2. Set the JSP Compilation level in the WebSphere application server to 18.

Deploying the WAR file or EAR file

When you deploy a new enterprise application, the WebSphere® Integrated Solutions Console presents a series of forms. The steps that follow provide guidance for setting specific controls on these forms. Different versions of WebSphere® can present controls in another sequence or with other labels.

About this task

Complete the following steps to deploy the WAR or EAR file:

1. Select **Applications > New Application > New Enterprise Application**.
2. On the initial form, select **Remote** file system and then **Browse** to the `Offer.war` file or your EAR file.
3. On the next **Preparing for the Application Installation** window:
     - Select **Detailed**.
     - Select **Generate Default Bindings**.
     - Select **Override existing bindings**.
4. On the **Select Installation Options** window, complete the following actions:

- Select **Precompile JavaServer Pages files**.
- For **Application name**, enter `offer`.
- Select **Override class reloading settings for Web and EJB modules**.
- For **Reload interval in seconds**, enter an integer such as `4`.

5. On the **Map Modules to Servers** window, select the **Module**. If you deployed an EAR, select every WAR file.

6. On the **Provide Options to Compile JSPs** window, select the **Web module**. If you deployed an EAR, select every WAR file.

7. Set the **JDK Source Level** to `18`.

8. On the **JSP reloading options for Web modules** form, select **JSP enable class reloading** and for **JSP reload interval in seconds** enter `5`.

9. On the **Map shared libraries** window, select the **Application** and the **Module**.

10. On the **Map shared library relationships** window, select the **Application** and the **Module**.

11. On the **Map resource references to resources** window, select the module and for **Target Resource JNDI Name** enter `campaignPartition1DS`.

12. On the **Map context roots for Web modules** window, for **Context Root** is `/Offer`.

13. Review and save your settings.

Defining class loader policy

Class loader policy defines how the application is configured on WAS. You must change some of the default settings on WAS before you deploy Unica Centralized Offer Management.

About this task

Complete the following steps to define the class loader policy:

1. On the **Enterprise Applications > offer > Class loader**, select **Override class reloading settings for Web and EJB modules**.

2. For **Class loader** order, select **Classes loaded with local class loader first (parent last)**.

3. For **WAR class loader policy**, select **Single class loader for application**.

4. Click **Apply** and **Save Settings**.

Defining settings for cookies

You must define and set settings for cookies by using **Session Management** option on the **Websphere Enterprise Applications**.

About this task

Complete the following steps to define the settings for cookies:

1. Go to the **Enterprise Applications > offer > Session management**.

2. Select **Override session management**.

3. Select **Enable cookies**.

4. Click **Apply**, then go to the **Enterprise Applications > offer > Session management > Cookies**.

5. Change the Unica Centralized Offer Management **Cookie name** from `JSESSIONID` to `OMSESSIONID`.

6. Click **Apply** and **Save Settings**.

Defining EAR module settings

If you deployed an EAR file, you must define settings for the individual WAR files that are contained by the EAR files.

About this task

Complete the following steps to define EAR file module settings:

1. Go to **Enterprise Applications** and select the EAR file.

2. On the **Manage Modules** form, select one of the WAR files; for example, `Offer.war`.

3. On the **Enterprise Applications > *EAR* > Manage Modules > WAR** form, complete the following sub-steps:

   a. Set **Starting weight** to `10000`.

   b. For **Class loader order**, select **Classes loaded with application class loader first**.

4. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session management**, select **Enable cookies**.

5. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session Management > Cookies**, complete the following steps:

   a. Set the **Cookie name** to `CMPJSESSIONID`.

   b. For the **Cookie maximum age**, select **Current browser session**.

6. On the **Enterprise Applications > EAR > Manage Modules > WAR > Session management**, enter the following information:

   a. Select **Allow overflow**.

   b. For **Maximum in-memory sessions**, enter `1000`.

   c. For **Session timeout**, select **Set timeout** and enter `30`.

7. Define the same settings for each of the other WAR files, including `unica.war` and `Offer.war`.

> **Note:** If the `Campaign.war` file also exists in the EAR file and you plan to integrate Unica Centralized Offer Management with Unica Campaign, define the same settings for the `Campaign.war` file.

Deploying Unica Centralized Offer Management on WebLogic

Use the following guidelines for deploying Unica Centralized Offer Management on WebLogic.

About this task

- Unica products customize the JVM used by WebLogic. You might create a WebLogic instance dedicated to Unica products if you encounter JVM-related errors.

- Do not install more than one Unica Centralized Offer Management application under the same WebLogic domain.

- Verify that the Software Development Kit (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.

Complete the following steps to deploy Unica Centralized Offer Management to WebLogic:

1. If your operating system is AIX®, extract the Unica Centralized Offer Management `WAR` file, delete the `xercesImpl.jar` file from `WEB_INF/lib` directory, and recreate the `WAR` file.
If the installer combined products in an `EAR` file, you must first extract that file to obtain the `WAR` file, and you must recreate the `EAR` file.
2. If you are configuring WebLogic to use the IIS plug-in, review the WebLogic documentation to determine whether you have additional requirements.
3. From the `bin` directory under your WebLogic domain directory, locate and open the `setDomainEnv` script in a text editor. Scroll to the `JAVA_OPTIONS` property and add the following entries. Use a space to separate entries.
   - set `"JAVA_OPTS=%JAVA_OPTS% -DUNICA_PLATFORM_CACHE_ENABLED=true`
   - `-DOFFER_HOME=<UNICA_HOME>\<Offer_Home>`

     Where `<UNICA_HOME>` is the path to the top-level directory and `<Offer_Home>` is the path to the directory where you installed Unica Centralized Offer Management. Typically, this directory is `<UNICA_HOME>/CentralizedOffer`.
   - For your installation to support non-ASCII characters, example for Portuguese or for locales that require multi-byte characters, add the following arguments to Generic JVM Arguments at the server level:
     ```
     -Dfile.encoding=UTF-8
     -Dclient.encoding.override=UTF-8
     ```
   - For the Oracle database, set the following system property:
     ```
     -Doracle.jdbc.J2EE13Compliant=true
     ```
4. Save and close the file.
5. Restart WebLogic.
6. Deploy Unica Centralized Offer Management as a web application module: select `Offer.war`.
7. Start the deployed web application.

Deploying Unica Centralized Offer Management on JBoss

You can deploy Unica products on JBOSS application server. Use the following guidelines when you deploy Unica Centralized Offer Management on JBOSS:

- Verify that your version of JBoss meets the requirements that are described in the *Recommended Software Environments and Minimum System Requirements* guide, including any necessary fix packs or upgrades.
- HCL Marketing Software products customizes the JVM used by JBoss. You might need to create a JBoss instance that is dedicated to HCL Marketing Software products, if you encounter JVM-related errors.
- If you are deploying in a production environment, set the JVM memory heap size parameters to at least `1024` by adding the following line to the `standalone.conf` file in the `JBOSS_EAP_HOME/bin`:
  ```
  JAVA_OPTS="-Xms1024m -Xmx1024m -XX:MetaspaceSize=96M - XX:MaxMetaspaceSize=256m "
  ```

These are the suggested minimum values. Analyze your sizing requirements to determine correct values for your needs. Depending upon system load `-Xmx` and `MaxMetaspaceSize` value should be adjusted.

> **Note:** A 64-bit application server and JVM are usually required for values greater than `2048`.

- Modify the `JAVA_OPTIONS` parameter to add the following value in `setenv.bat/sh`:

```
set "JAVA_OPTS=%JAVA_OPTS% -DUNICA_PLATFORM_CACHE_ENABLED=true
-Dclient.encoding.override=UTF-8 -DOFFER_HOME=<UNICA_HOME>\<Offer_Home>"
```

- Navigate to the JBoss Enterprise Application management Console, for example `http://<Jboss_Host_IP>:<Port>/management`.

- Deploy `Offer.war` on JBOSS.

- You can also deploy `Offer.war` using `jboss-cli.bat/sh`. Run the following command:

```
jboss-cli.bat/sh
```

and connect to the JBoss instance using the following command:

```
connect <Jboss_Host_IP>:<JBOSS management Port>
deploy <UNICA_HOME>/CentralizedOffer/Offer.war
```

- For the Oracle database, set the following system property:

```
-Doracle.jdbc.J2EE13Compliant=true
```

- After making the changes, restart the JBoss application server.

Deploying Unica Centralized Offer Management on Tomcat

You must follow a set of guidelines when you deploy Unica Centralized Offer Management on Apache Tomcat.

Ensure that the version of Apache Tomcat meets the requirements that are described in the *Recommended Software Environments and Minimum System Requirements* document.

> **Note:** Deployment of EAR file is not supported on Apache Tomcat.

Use the following guidelines when you deploy Unica Centralized Offer Management on Apache Tomcat:

1. From the bin directory, inside the Apache Tomcat installation directory (Inside the `<Tomcat_Instance_Home>\instanceN\bin`), locate or create the `setenv.sh` or `setenv.bat` script appropriate for your operating system in a text editor, and add or modify `JAVA_OPTIONS` property, and add the following entries. Use a space to separate entries.
   - `-DOFFER_HOME=<UNICA_HOME>\<Offer_Home>`

     Where `<UNICA_HOME>` is the path to the top-level directory and `<Offer_Home>` is the path to the directory where you installed Unica Centralized Offer Management. Typically, this directory is `<UNICA_HOME>/CentralizedOffer`.

```
set "JAVA_OPTS=%JAVA_OPTS% -DOFFER_HOME=<CentralizedOffer_home>
            -DUNICA_PLATFORM_CACHE_ENABLED=true"
```

   - For your installation to support non-ASCII characters, example for Portuguese or for locales that require multi-byte characters, add the following arguments to Generic JVM Arguments at the server level:

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

- For the Oracle database, set the following system property:

```
-Doracle.jdbc.J2EE13Compliant=true
```

2. Create the `Offer.xml` file and place in `<Tomcat_Install_Home>\instanceN\conf\Catalina\localhost`.
   The following is a sample file

```xml
<?xml version="1.0"?>
<Context docBase="<OFFER_HOME>\Offer.war">
        <Resource name="UnicaPlatformDS" factory="com.unica.manager.tomcat.utils.TomcatDSFactory"
 auth="Application" type="javax.sql.DataSource"
                        maxActive="30" maxIdle="10" maxWait="10000"
                        username="<USER_NAME>" password="<ENCRYPTED_PASSWORD>"
 driverClassName="com.microsoft.sqlserver.jdbc.SQLServerDriver"
                        url="jdbc:sqlserver://Host:port;databaseName=<Platform_DB_Name>"/>

        <Resource name="campaignPartition1DS" factory="com.unica.manager.tomcat.utils.TomcatDSFactory"
 auth="Application" type="javax.sql.DataSource"
                        maxActive="30" maxIdle="10" maxWait="10000"
                        username="<USER_NAME>" password="<ENCRYPTED_PASSWORD>"
 driverClassName="com.microsoft.sqlserver.jdbc.SQLServerDriver"
                        url="jdbc:sqlserver://Host:port;databaseName=<Campaign_Partition1_DB_NAME>"/>

        <Resource name="campaignPartition2DS" factory="com.unica.manager.tomcat.utils.TomcatDSFactory"
 auth="Application" type="javax.sql.DataSource"
                        maxActive="30" maxIdle="10" maxWait="10000"
                        username="<USER_NAME>" password="<ENCRYPTED_PASSWORD>"
 driverClassName="com.microsoft.sqlserver.jdbc.SQLServerDriver"
                        url="jdbc:sqlserver://Host:port;databaseName=<Campaign_Partition2_DB_NAME>"/>
</Context>
```

3. Inside `<PLATFORM_HOME>/tools/bin`, encrypt the password using `encryptTomcatDBPasswords.bat/sh`.

```
encryptTomcatDBPasswords.bat -d <PASSWORD>
```

4. Copy the database driver in `<Tomcat_Instance_Home>\lib`.
5. Start the offer application by running the following command:

```
startup.sh/bat instanceN
```

Chapter 7. Configuration of Unica Centralized Offer Management after deployment

- If you have performed a fresh installation of Unica Campaign and Unica Centralized Offer Management, ensure that the `partition1` node, of Centralized Offer Management, is configured for the datasource `UA_SYSTEM_TABLES` with the Campaign datasource JNDI name. For more information related to this configuration, see the topic **offer | partitions | partition<n> | Data Sources | (Data_Source_Template)** in the *Unica Centralized Offer Management Administrator's Guide*.
- If you change any configuration in Unica Campaign, it requires restarting the Centralized Offer Management application.
- After you deploy and start the Unica Centralized Offer Management application, log in and verify the installation. There are some basic configuration steps such as configuring the system user and a test user.

> **Note:** You can find more system setup tasks in the *Unica Centralized Offer Management Administrator's Guide*.

Google Chrome and Microsoft Edge configuration

Recently, the browsers Google Chrome and Microsoft Edge updated a security fix and this security fix affects the access of Unica applications. We have received some issues from our customers like:

- issues with UI
- unable to edit flowcharts
- getting logged out from Unica

These issues are observed due to the change of behavior in browsers after applying the security fix. Applying the security fix automatically enables **Origin-keyed Agent Clusters by default**. If the setting **Origin-keyed Agent Clusters by default** is enabled automatically, it prevents changes in document referrer and domain values so that malicious websites cannot execute any type of impersonation. The setting **Origin-keyed Agent Clusters by default** existed earlier as well, but was not enabled by default.

If you update Google Chrome or Microsoft Edge to the latest version, you will observe the earlier mentioned issues. Because of how Unica is designed and because the Unica suite is deployed over multiple JVMs, it is essential that you disable the **Origin-keyed Agent Clusters by default** setting for Unica to function correctly and to provide a good user experience.

As a solution, we recommend that you perform the steps mentioned in the following Knowledge Base article: https://support.hcltechsw.com/csm?id=kb_article&sysparm_article=KB0107185.

> **Note:** The update to Microsoft Edge browser is very recent and the Knowledge Base article is not yet updated for the Microsoft Edge browser.

The CliffsNotes solution is as follows:

1. Open your browser and navigate to one of the following URLs based on your browser:
   - **Google Chrome**: chrome://flags/#origin-agent-cluster-default
   - **Microsoft Edge**: edge://flags/#origin-agent-cluster-default
2. From the dropdown of the highlighted parameter **Origin-keyed Agent Clusters by default**, select `Disabled`.
3. At the bottom of the page, click the **Apply Changes** button.
4. Log out of Unica applications, log back in, and verify if everything is working as expected.

Verifying the installation

After you install Unica Platform, verify that the installation is successful. The installation is successful if you can see the name of the Unica product in the **Configuration** list on the **Settings** page after you log in to Unica.

About this task

Complete the following steps to verify your Unica Platform installation:

1. Access the Unica URL by using Internet Explorer.

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

   `http://host.domain.com:port/unica`

2. Log in using the default administrator login. The username for administrator login is `asm_admin`.

   The first time you log in, the default value of user password is `password`. You are asked to change the password. You can enter the existing password, but you must choose a new one. You must change user's password when you verified your Unica Platform installation.

   The default home page is the Dashboard, which is a blank page until dashboards are set up. See the *Unica Platform Installation Guide* for instructions about deploying the Dashboard `WAR` file.

3. Select **Settings** > **Configuration** and verify that **offer** is displayed in the list on the left.
4. **Optional**: Make the **Configuration Settings** page as your "home" page until you configure the dashboard. That way, a blank page is not displayed each time you log in.

Granting the `asm_admin` user access to Unica Centralized Offer Management

The default admin user (`asm_admin`) can access the Unica Centralized Offer Management configuration properties automatically. However, there are no default users with access to the Unica Centralized Offer Management application until you configure them.

About this task

Complete the following steps to grant the `asm_admin` user access to Unica Centralized Offer Management:

1. Create a group. For example, select **Settings > User groups > New Group** and set up **Default-Offers-Group**.
2. Assign the **OfferAdmin** and **OfferUser** roles to the group.

3. Assign the **asm_admin** user to the group.

4. Restart the application server.

5. Log back in as **asm_admin**.

6. Verify that you have access to Unica Centralized Offer Management features by selecting **Offer > Offers**.

Chapter 8. Multiple partitions in Unica Centralized Offer Management

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

When you configure Unica Centralized Offer Management or a related Unica application to operate with multiple partitions, users can see each partition as a separate instance of the application. There is no indication that other partitions exist on the same computer.

How multiple partitions work

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

Partition benefits

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

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

Partition user assignment

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

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

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

Partition data access

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

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

Configuring multiple partitions

Unica Centralized Offer Management has a seamless integration with Unica Campaign. During installation, if Campaign has multiple partitions, Unica Centralized Offer Management also configures the same number of partitions with the relevant data configured within the partitions. Post installation, if a user adds a new partition in Campaign, a new partition should be configured on Unica Centralized Offer Management.

If the user adds a new partition in Campaign, perform the following steps to create a similar partition on Unica Centralized Offer Management:

a. On the **Configuration** page, navigate to **offer > partitions** and click *(partitionTemplate)*.

   If you do not see the *(partitionTemplate)* property in the list, use the `configTool` utility to import the partition template using the following command:

   ```
   configTool.bat -vp -p "Affinium" -f
   "<Offer_Home>\conf\offers_configuration.xml"
   ```

   Replace *OFFER_HOME* with the actual path to your Unica Centralized Offer Management installation.

   The `configTool` utility is found in the `tools` directory under your Unica Platform installation. See the *Unica Platform Administrator's Guide* for information on using this utility.

   Result
   In the right pane, you see the **partitionTemplate** pane with an empty **New category name** field.

b. Enter the name for the new partition, using the same name that you used when creating the partition's directory structure in Campaign.

c. Click **Save Changes**.
   Result
   You see the new partition structure, with the same categories and properties as in the partition template.

Partition superuser

To administer security across all users of Unica Platform, a user account must exist that has access to all security settings and user accounts in the system.

By default, this user account is `platform_admin`. This user account does not belong to any one partition; instead, it has access to all user accounts in all partitions.

The administrator can create additional users with the same level of access. To be a partition superuser, an account must have Admin access to the Unica Platform and have full access to the Users, User Groups, and User Permissions pages.

Setting up system users for Unica Centralized Offer Management

On UNIX™, for the **Alternate Login** attribute of the system user, enter the UNIX™ name for a user in a group that shares privileges with the UNIX™ users of Unica Centralized Offer Management.

Note: If you have multiple partitions, you must create a system user for each partition.

Using Unica Insights Reports for multiple reports

If you want to use Unica Insights Reports for multiple partitions in Unica Campaign or Unica Interact, you must configure Unica Insights Reports package for each partition. For instructions, see the *Unica Insights Reports Installation and Configuration Guide.*

Assigning roles, permissions, and groups for partitions

Before you can use the partitions that you have configured for Unica Centralized Offer Management, you must assign roles to the user with administrator role in each partition. You must also assign a group to each partition.

Use the partitionTool utility to create a default admin user for each partition that you create.

Assign roles to each partition Admin user - The `partitionTool` utility creates a default Admin user for each partition you create. On the **Users** page, assign at least one security role (for example, Global Policy/Admin) and any Offer role to your new user. Once the new user has been assigned the role, you can log into the Unica Centralized Offer Management partition as that new user.

Chapter 9. Integration with Unica Insights Reports

Unica Centralized Offer Management supports integration with Unica Insights Reports. It does not support integration with IBM Cognos reports.

Unica Centralized Offer Management integrates with Unica Insights Reports, which is shipped with Unica Platform. Reporting relies on a set of reports for Centralized Offer Management application, which are installed with the Unica Platform installer.

For more details on how to install and configure Unica Insights Reports for Centralized Offer Management, see the *Unica Platform Installation Guide* and *Unica Insights Reports Installation and Configuration Guide*.

Chapter 10. Disable or Uninstall Unica Centralized Offer Management

You can choose to disable Unica Centralized Offer Management or uninstall it.

To disable Centralized Offer Management, see .

To uninstall Centralized Offer Management, see .

Disabling Unica Centralized Offer Management

You can choose to disable Unica Centralized Offer Management and continue using the Offer management feature of Unica Campaign.

About this task

To disable Centralized Offer Management, complete the following steps:

1. Select **Settings > Configuration**.
2. Select **Unica Platform**.
3. Click **Edit settings**.
4. For the **Enable Centralized offer management field**, set the value NO.
5. Click **Save**.

   Note: After applying the changes, restart Unica Platform application.

Uninstalling Unica Centralized Offer Management

To uninstall Unica Centralized Offer Management, run the uninstaller. When you run the uninstaller, the files that were created during the installation process are removed. For example, files such as configuration files, installer registry information, and user data are removed from the computer.

About this task

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

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

Note: On UNIX, the same user account that installed Centralized Offer Management must run the uninstaller.

1. If you have deployed the Centralized Offer Management web application, undeploy the web application from your web application server.
2. Shut down web application server.
3. Stop the processes that are related to Centralized Offer Management.
4. Complete one of the following steps to uninstall Centralized Offer Management:

    Choose from:

    - Click the Unica Centralized Offer Management uninstaller that exists in the `Uninstall_Product` directory. The uninstaller runs in the mode in which you installed Unica Centralized Offer Management.
    - In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Centralized Offer Management by using the console mode:

      Uninstall_*Product* -i console
    - In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Centralized Offer Management by using the silent mode:

      Uninstall_*Product* -i silent

      When you uninstall Centralized Offer Management, using the silent mode, the uninstallation process does not present any dialogs for user interaction.

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

What to do next

After uninstallation, to continue using Unica Campaign's offer management feature, you must disable Unica Centralized Offer Management. For more information, see Disabling Unica Centralized Offer Management on page 48.