

HCL Unica V26.1.0 Fast Upgrade Guide



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Chapter 1. Unica Upgrade Paths

You can also refer the Unica Fast Upgrade Guide section to perform fast upgrade of Unica products from existing version to the latest version.

Upgrading Unica from On Premises setup to On Premises Setup

If you have an on premises setup of Unica and you want to retain the on premises setup and upgrade to the latest version of Unica, you must perform the upgrade as mentioned in the following table:

Your current version of Unica	Options to upgrade to 26.1.0
10.1.x	<ul style="list-style-type: none">• Option 1<ul style="list-style-type: none">◦ Fast upgrade from 10.1.x to 12.1.0◦ In-place upgrade from 12.1.0 to 26.1.0• Option 2<ul style="list-style-type: none">◦ Fast upgrade from 10.1.x to 26.1.0
11.x.x	<ul style="list-style-type: none">• Option 1<ul style="list-style-type: none">◦ Fast upgrade from 11.x.x to 12.1.0◦ In-place upgrade from 12.1.0 to 26.1.0• Option 2<ul style="list-style-type: none">◦ Fast upgrade from 11.x.x to 26.1.0
12.0.x	<ul style="list-style-type: none">• Option 1<ul style="list-style-type: none">◦ Fast upgrade from 12.0.x to 12.1.0◦ In-place upgrade from 12.1.0 to 26.1.0• Option 2<ul style="list-style-type: none">◦ Fast upgrade from 12.0.x to 26.1.0
12.1.x	<ul style="list-style-type: none">• Option 1<ul style="list-style-type: none">◦ In-place upgrade from 12.1.x to 26.1.0• Option 2<ul style="list-style-type: none">◦ Fast upgrade from 12.1.x to 26.1.0
25.1.0/25.1.0.1/25.1.1	<ul style="list-style-type: none">• In-place upgrade from 25.1.0/25.1.0.1/25.1.1 to 26.1.0

Upgrading Unica from On Premises Setup to Cloud-native Setup

If you have an on premises setup of Unica and you want to move to a cloud-native setup with the latest version of Unica, you must perform the upgrade as mentioned in the following table:

Your current version of Unica	Upgrading to 26.1.0
10.1.x	Upgrade directly to 26.1.0
11.x.x	
12.0.x	
12.1.x	
25.1.x	



Important: This point is specific for users moving from on premises setup to HCL Cloud or HCL Now setup. When upgrading from an on premises setup to a HCL Cloud or HCL Now setup, if your current version is 10.1.x or 11.x.x and the database of your setup is Oracle, Microsoft SQL Server, or IBM DB2, you must first perform a Fast Upgrade to 26.1.0, and after the upgrade you must migrate the database to MariaDB. Once the upgrade and migration of the database is completed, you can add new products.



Note: When upgrading from an on premises setup to an on premises setup, you cannot perform a Fast Upgrade on Unica Journey. But if you are upgrading your existing on premises setup to a cloud-native setup, you can perform a Fast Upgrade of Journey as the helm charts can handle the Fast Upgrade.

Upgrading Unica from Cloud-native Setup to Cloud-native Setup

To upgrade Unica from existing cloud-native setup to the latest cloud-native setup, you must perform an in-place upgrade from the existing version to 26.1.0.

Chapter 2. Unica Fast Upgrade

Overview

Unica 26.1.0 supports a fast upgrade from earlier versions. This document outlines the additional steps required for each product to perform a direct fast upgrade to 26.1.0.

Before you begin fast upgrade

About this task



Note:

HCL Unica 26.1.0 products are license based, and user will need to configure required licenses with HCL Unica products to start using them.

HCL Unica 26.1.0 products require licenses to get started. Users are required to contact HCL Unica Sales team to access the HCL Licensing server. HCL Unica Sales team will provide the access to the required products through the HCL Licensing portal. After getting the access, users can contact the HCL Unica support team to know more on configuring licenses on production or non-production environment.

Read carefully the HCL Unica Licensing Guide to understand how to configure, register license servers and follow license consumption.

1. The fast upgrade approach supports the HCL Unica products (Unica Platform, Unica Campaign, Unica Optimize, Unica Plan, Unica Interact) upgrade 10.1.x version onwards.
2. While migrating the Unica system database from source (the production / test) environment to 26.1.0 (a clean environment) it is strongly recommended that you check if all the required constraints and indexes are migrated successfully. Any failures in this will cause the fast upgrade to fail.
3. System tables data migration from source (production / test) environment to 26.1.0 (a clean environment) should be done with help of your DBA.
4. This upgrade should be executed, verified and tested on the QA environment before executing on the production environment.
5. Stop 26.1.0 all product application services, Campaign listener, Optimize listener or any other running processes before proceeding with fast upgrade.
6. If you are planning to perform a fast upgrade and add new products in the Unica suite , you should perform a fast upgrade first.

The new products include:

- Unica Audience Central
- Unica Centralized Offer Management
- Unica Contact Central
- Unica Content Integration

- Unica Journey
- Unica Segment Central



Note: If you already have Journey, you cannot perform a Fast Upgrade. If your existing version is earlier than 12.1.10/12.1.11, you must perform an in-place upgrade from existing version to 12.1.10/12.1.11 and from 12.1.10/12.1.11 to 26.1.0. If your existing version is 12.1.10/12.1.11, you must perform an in-place upgrade to 26.1.0. Alternatively, you can perform a clean installation of Unica Journey.

7. After completing the base version upgrade to 26.1.0, perform a clean installation of the mentioned new products.

High-level steps involved in the Fast Upgrade process

The Unica Fast upgrade process is introduced to help complete the upgrade process in a short time so that you encounter less downtime on your production environment. Also, the Fast upgrade process will get executed on a clean 26.1.0 environment, so users' existing environment will remain untouched. **Please note** that the extension of script files on Windows operating systems is ".bat", and on Unix operating systems, it is ".sh". When running scripts as suggested in this document, please choose the corresponding extension.

Installing a clean 26.1.0 environment

1. You must set up a clean 26.1.0 environment with the same products installed as in the old version.
2. You can setup a clean 26.1.0 environment either on the same hardware or a different hardware. We recommend that you setup a clean 26.1.0 environment on a different hardware. If installed on the same hardware you must configure the JVM memory options for the new environment and keep sufficient disk space, memory and CPU for the older versions as well as for the 26.1.0 version.
3. A clean 26.1.0 environment installation should be done with the stack combination used in the old version. For example, if your existing 10.1.0 version is installed on the RHEL operating system with the DB2 database, then a clean 26.1.0 should be installed on the same operating system flavor and same database vendor. But, note that you must use the supported third party software - operating systems, application servers, database, and so on versions that 26.1.0 supports.
4. Ensure that the 26.1.0 application is up and running.

Migrating the system database

About this task

The steps underneath are database specific, you may consult your DBA to complete them:

1. You must take a backup of the system tables from the old version.
2. You must also take a backup of the system tables from the 26.1.0 version.
3. Stop the clean installed target application.

4. Clean up the system tables of the 26.1.0 clean applications. This involves deleting all the tables, constraints, indexes, and so on from the system tables. Alternatively, you can create new database schemas to migrate system data from the old version to the 26.1.0 version.
5. Restore the database backup from the older version system tables to the 26.1.0 application system tables for all the required products into the respective database schema.

Executing the Fast Upgrade

1. You must execute the Unica Platform upgrade process first. In case Unica Campaign is part of the installed suite then execute the Fast Upgrade for Unica Campaign. Only after that execute the other fast upgrades.
2. Contact Technical Support if you encounter errors in the Fast Upgrade process.

Post Fast Upgrade

1. After completing the Fast Upgrade, you must execute the configuration steps for every product. Refer to the respective product section in this guide for details.
2. Perform a UAT on the upgraded environment. The old version can be shutdown once the UAT passes and the new 26.1.0 environment can then be used in production.

Procedure: Fast upgrade Unica Platform

Import the Unica Platform system tables backup from the old version to the system tables schema used in the clean 26.1.0 environment.

Upgrading the Unica Platform database manually

IBM DB2 Database

On the Unica Platform database, manually execute the scripts provided in the following table when upgrading from various base versions:

About this task

Upgrade Path: 10.1.x to 26.1.0	
If non-unicode environment	If unicode environment
<pre><PLATFORM_HOME>/db/upgrade101to11/ManagerSchema_DB2_11upg.sql <PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_DB2_111upg.sql <PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_DB2_11102upg.sql <PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_DB2_12upg.sql <PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_DB2_121upg.sql <PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql</pre>	<pre><PLATFORM_HOME>/db/upgrade101to11/ManagerSchema_DB2_11upg_unicode.sql <PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_DB2_12upg_unicode.sql <PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_DB2_121upg_unicode.sql <PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql <PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_unicode_upg.sql</pre>

<pre> <PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg.sql <PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_DB2_upg.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerUpdate_261_DB2_upg.sql </pre>	<pre> <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg_unicode.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg_unicode.sql <PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_DB2_upg_unicode.sql </pre>
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Upgrade Path: 11.x.x to 26.1.0

If non-unicode environment	If unicode environment
<pre> <PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_DB2_111upg.sql <PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_DB2_11102upg.sql <PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_DB2_12upg.sql <PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_DB2_121upg.sql <PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql <PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg.sql </pre>	<pre> <PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_DB2_12upg_unicode.sql <PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_DB2_121upg_unicode.sql <PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql <PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg_unicode.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg_unicode.sql </pre>

<pre><PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg.sql <PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_DB2_upg.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerUpdate_261_DB2_upg.sql</pre>	<pre><PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_DB2_upg_unicode.sql</pre>
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Upgrade Path: 12.1.x to 26.1.0

If non-unicode environment	If unicode environment
<pre><PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg.sql <PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_DB2_upg.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerUpdate_261_DB2_upg.sql</pre>	<pre><PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/DB2_QRTZ_Scheduler_12104_upgrade_Script.sql <PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_DB2_1212upg_unicode.sql <PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_DB2_1219upg_unicode.sql <PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_DB2_unicode_upg.sql <PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_DB2_upg_unicode.sql <PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_DB2_upg_unicode.sql</pre>

Microsoft SQL Server Database

About this task

<p>Upgrade Path: 10.1.x to 26.1.0</p> <pre><PLATFORM_HOME>/db/upgrade101to11/ManagerSchema_SqlServer_11upg.sql <PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_SqlServer_111upg.sql <PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_SqlServer_11102upg.sql <PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_SqlServer_12upg.sql <PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_SqlServer_121upg.sql <PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_SqlServer_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_SqlServer_upg.sql <PLATFORM_HOME>/db/upgrade12103to12104/SqlServer_QRTZ_Scheduler_12104_upgrade_Script.sql</pre>
--

```

<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_SqlServer_1212upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_SqlServer_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade2511to261/ManagerUpdate_261_SqlServer_upg.sql

```

Upgrade Path: 11.x.x to 26.1.0

```

<PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_SqlServer_111upg.sql
<PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_SqlServer_11102upg.sql
<PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_SqlServer_12upg.sql
<PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_SqlServer_121upg.sql
<PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/SqlServer_QRTZ_Scheduler_12104_upgrade_Script.sql
<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_SqlServer_1212upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_SqlServer_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_SqlServer_upg.sql

```

Upgrade Path: 12.1.x to 26.1.0

```

<PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/SqlServer_QRTZ_Scheduler_12104_upgrade_Script.sql
<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerSchema_SqlServer_1212upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_SqlServer_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerUpdate_2511_SqlServer_upg.sql
<PLATFORM_HOME>/db/upgrade2511to261/ManagerUpdate_261_SqlServer_upg.sql

```

Oracle Database

About this task

Upgrade Path: 10.1.x to 26.1.0

```

<PLATFORM_HOME>/db/upgrade101to11/ManagerSchema_Oracle_11upg.sql
<PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_Oracle_111upg.sql

```

```

<PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_Oracle_11102upg.sql
<PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_Oracle_12upg.sql
<PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_Oracle_121upg_unicode.sql
<PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql
<PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/Oracle_QRTZ_Scheduler_12104_upgrade_Script.sql
<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerUpdate_1212_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_Oracle_upg.sql (Required only if
AssetPicker is installed)
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_Oracle_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_Oracle_upg.sql

```

Upgrade Path: 11.x.x to 26.1.0

```

<PLATFORM_HOME>/db/upgrade1101to111/ManagerSchema_Oracle_111upg.sql
<PLATFORM_HOME>/db/upgrade111to11102/ManagerSchema_Oracle_11102upg.sql
<PLATFORM_HOME>/db/upgrade11102to12/ManagerSchema_Oracle_12upg.sql
<PLATFORM_HOME>/db/upgrade12to121/ManagerSchema_Oracle_121upg_unicode.sql
<PLATFORM_HOME>/db/upgrade121to12101/ManagerUpdate_12101upg.sql
<PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/Oracle_QRTZ_Scheduler_12104_upgrade_Script.sql
<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerUpdate_1212_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_Oracle_upg.sql (Required only if
AssetPicker is installed)
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_Oracle_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_Oracle_upg.sql

```

Upgrade Path: 12.1.x to 26.1.0

```

<PLATFORM_HOME>/db/upgrade12101to12103/ManagerUpdate_12103_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/ManagerUpdate_12104_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade12103to12104/Oracle_QRTZ_Scheduler_12104_upgrade_Script.sql
<PLATFORM_HOME>/db/upgrade12104to1211/ManagerUpdate_1211_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ManagerUpdate_1212_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1211to1212/ContentIntegrationUpdate_1212_Oracle_upg.sql (Required only if
AssetPicker is installed)
<PLATFORM_HOME>/db/upgrade1212to1213/ManagerSchema_1213_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1213to1214/ManagerSchema_1214_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1214to1215/ManagerSchema_1215_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade1218to1219/ManagerSchema_Oracle_1219upg.sql
<PLATFORM_HOME>/db/upgrade1219to251/ManagerUpdate_251_Oracle_upg.sql

```

```
<PLATFORM_HOME>/db/upgrade25101to2511/ManagerSchema_2511_Oracle_upg.sql
<PLATFORM_HOME>/db/upgrade2511to261/ManagerSchema_261_Oracle_upg.sql
```

MariaDB database and PostgreSQL database

About this task

Refer the earlier mentioned steps for PostgreSQL and Maria DB. SQL script will be available for all the databases in the same path mentioned earlier.

Updating the JDBC files in Unica Platform

In case you do not want to reuse the Platform schema used for a 26.1.0 clean installation and want to use another user schema, perform the following steps.

About this task

1. Export the version configuration using the following command on clean 26.1.0 environment.

```
./configTool.sh -x -p "Affinium|Manager|about" -f "<PLATFORM_HOME>/conf/about.xml"
```

2. Take a backup of the jdbc.properties file from the 26.1.0 environment (Platform/tools/bin/jdbc.properties). Update the username in the 26.1.0 Platform system database / schema name in jdbc.properties file.

Example of jdbc.properties:

```
uasm.jdbc_driver=com.ibm.db2.jcc.DB2Driver
```

```
uasm.data_source=jdbc:db2://<DB_HOST>:<DB_PORT>/<DB2_SID>
```

```
uasm.data_source_login=<PLATFORM_DB_SCHEMA>
```

```
uasm.data_source_password=ENC(T+rSrWP41Vqu8SoDARMhDdWkf0dFB0Zc)
```

```
hibernate.dialect=org.hibernate.dialect.DB2Dialect
```

3. To update the encrypted password in the jdbc.properties file run the following command: Navigate to Platform/tools/bin directory and execute the below command:

```
./encryptPasswords.sh -d <PLATFORM_DB_USER_PASSWORD>
```

This will update the encrypted password in the jdbc.properties file. Save the Platform/tools/bin/jdbc.properties with this encrypted password of the new schema user.

4. In the application server, update the JNDI details (schema / SID, userid, password) for Platform JNDI as per the new database schema used with version 26.1.0 environment.

Upgrading the Unica Platform configuration

1. Execute the following command to upgrade Unica Platform configurations to 26.1.0.

Navigate to `<UNICA_PLATFORM_HOME>/tools/bin` directory

Execute command:

```
./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/Manager_config.xml"
```

Note: You may encounter an insertion of duplicate key related error or `com.ibm.db2.jcc.am.SqlIntegrityConstraintViolationException`:

See the [Troubleshooting on page 59](#) section.

2. Execute the command: `./populateDb.sh -n Manager`
3. Execute the command:


```
./configTool.sh -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>/conf/watsonAssistant_navigation.xml"
```
4. Execute the command: `./alertConfigTool.sh -i -f "<UNICA_PLATFORM_HOME>/conf/Platform_alerts_configuration.xml"`

Note: If upgrading from version 11.0.1, then do not execute the below scripts(step 5).

5. Execute the command: `./configTool.sh -vp -p "Affinium|Report|integrations" -f "<UNICA_PLATFORM_HOME>/conf/upgrade101to11/cognos11_integration.xml"`
6. Upgrade the scheduler jobs.

Use the `quartzjobtool` to update scheduler jobs. This is a required step. If this upgrade tool is not run, any existing scheduled job fails to start. The `quartzjobtool` is in the `tools\bin` directory under Unica Platform installation. Run this utility from the `tools\bin` directory.

Example command (Windows): `quartzjobtool.bat`

Example command (Unix): `./quartzjobtool.sh`



Note:

- While executing step 6, Upgrade the scheduler jobs – you might face an issue executing the `quartzjobtool`, Please contact support to get the fix to resolve this.
- Remove the `set` keyword from the `TOOLS_CLASSPATH` parameter in the `setenv_quartz.sh` file for RHEL, AIX, and SUSE.

7. For Unica Insights users, execute the following command.

```
configTool -vp -p "Affinium" -f <Insights.xml directory_path>/Insights.xml
```

(Insights.xml directory_path : `/opt/HCL/Unica_12/Platform/Insights/conf`)

If you are upgrading from version 26.1.0 and Birt is installed, do not run `Insights.xml` as it is handled by `populateDb` utility.

8. Execute the command:

```
./configTool.sh -vp -p "Affinium|suite|security" -f "<UNICA_PLATFORM_HOME>/conf/upgrade12to121/APISecurity.xml"
```

9. Execute the command for Deliver:

```
./configTool.sh -vp -p "Affinium|suite|security|apiSecurity" -f "<UNICA_PLATFORM_HOME>/Platform/conf/upgrade12to121/APISecurity_Deliver.xml"
```

10. Execute the following command for Licensing:

```
./configTool.sh -vp -p "Affinium|suite|uiNavigation|settingsMenu" -f "<UNICA_PLATFORM_HOME>/conf/upgrade12to121/LicenseDetailsNavigation.xml"
```

Setting the Unica Platform – Help About > Version

1. Import the about.xml edited file using the following command: `./configTool.sh -v -i -o -p "Affinium|Manager" -f <PLATFORM_HOME>/conf/about.xml`.
2. Edit the exported about.xml.

```
<property id="xxxxxx" name="releaseNumber" type="string_property"
width="40">
<value>26.1.0.GA_BUILD</value>
</property>
```

Unica Platform post-upgrade

Unica Platform application navigation URL points to the old base environment. You must change the navigation URL using the SQL script from the Platform system database and if the domain name is different from Source environment then update that as well in the database.

1. The URL of the start page that appears when each user log in to HCL Unica products has to be changed manually from the **USM_PERSONALIZATION** table.
2. Check the following properties files from the source and destination Environment. Copy all the urls mentioned in the respective properties files from source to destination files.
 - Platform_Admin_URL.properties
 - Platform_Admin_View_Priv.properties
 - Platform_Admin_URL.properties
 - Platform_Admin_Scheduler_Scripts.properties
 - Platform_Admin_Scheduler_API.properties
3. Perform UAT on Unica Platform application. Make sure all the functions are working correctly.
4. If you configure the Platform login method differently than the Platform login method, ensure that it is correctly configured and creating the expected number of users. Then you can proceed to the next step and register licenses on your production server.

Additional configurations for Platform Fast Upgrade

The following are the additional configurations required for Unica Platform:



Note: In the following table, start executing the configurations in a sequence based on your existing version. For example, if your existing version is 12.1.0.3, start from the the third row in the following table.

Upgrade 10.1.0 to 11	<pre>configTool.bat -vp -p "Affinium Report integrations" -f /conf/upgrade101to11/cognos11_integration.xml</pre>
upgrade121to12103	<pre>./configTool.sh -vp -p "Affinium suite security apiSecurity manager" -f / opt/Install/fastup_25_1/Platform/conf/upgrade121to121 03/APISecurity_GetInstalledApps.xml ./configTool.sh -vp -p "Affinium suite" -f / opt/Install/fastup_25_1/Platform/conf/upgrade121to121 03/PlanJourneyIntegrationOption.xml ./configTool.sh -vp -p "Affinium suite security loginModes siteMinderPartition Login" -f / opt/Install/fastup_25_1/Platform/conf/upgrade121to121 03/SiteMinder_AdditionalHeaderVariables.xml</pre>
12.1.0.3 to 12.1.0.4	<pre>./configTool.sh -vp -p "Affinium Manager" -f / opt/Install/fastup_25_1/Platform/conf/upgrade12103to121 04/PasswordRules.xml ./configTool.sh -i -o -p "Affinium suite" -f / opt/Install/fastup_25_1/Platform/conf/upgrade12103to121 04/support_Collaborate.xml</pre>
12.1.0.4 to 12.1.1	<pre>./configTool.sh -vp -p "Affinium Report integrations" -f / opt/Install/fastup_25_1/Platform/conf/upgrade12104to12 11/LookerIntegration.xml</pre>

	<pre>./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu Analytics" -f / opt/Install/fastup_25_1/Platform/conf/upgraded12104to1211/OpenInsights_navigation.xml ./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu Analytics" -f / opt/Install/fastup_25_1/Platform/conf/upgraded12104to1211/OpenInsightsSeparator_navigation.xml</pre>
<p>upgrade1213to1214</p>	<pre>./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu" -f / opt/Install/fastup_25_1/Platform/conf/upgraded1213to1214/Manager_AddMenuCategory.xml ./configTool.sh -vp -p "Affinium suite security apiSecurity" -f / opt/Install/fastup_25_1/Platform/conf/upgraded1213to1214/Manager_V2_APIs.xml ./configTool.sh -v -i -p "Affinium suite uiNavigation mainMenu" -f / opt/Install/fastup_25_1/Platform/conf/upgraded1213to1214/MarketingCentral.xml</pre>
<p>upgrade1214to1215</p>	<pre>./configTool.sh -vp -p "Affinium suite scheduler taskRegistrations" -f / opt/Install/fastup_25_1/Platform/conf/upgraded1214to1215/segmentCentral_scheduler.xml</pre>
<p>upgrade1215to1216</p>	<pre>./configTool.sh -vp -p "Affinium" -f / opt/Install/fastup_25_1/Platform/conf/upgraded1215to1216/whatsNewUrlConfig.xml</pre>
<p>upgrade1216to1217</p>	<pre>./configTool.sh -vp -p "Affinium" -f /</pre>

	<pre>opt/Install/fastup_25_1/Platform/conf/upgrade1216to1217/intelliServiceIntegration.xml ./configTool.sh -vp -p "Affinium Manager navigation" -f / opt/Install/fastup_25_1/Platform/conf/upgrade1216to1217/managerServerURLInternalConfig.xml</pre>
upgrade1218to1219	<pre>./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu" -f "/opt/Install/fastup_25_1/Platform/conf/upgrade1218to1219/AION_Menu.xml" ./configTool.sh -vp -p "Affinium" -f / opt/Install/fastup_25_1/Platform/conf/upgrade1218to1219/AION_configuration.xml ./configTool.sh -vp -p "Affinium suite security apiSecurity manager" -f / opt/Install/fastup_25_1/Platform/conf/upgrade1218to1219/Manager_V2_APIs.xml ./configTool.sh -vp -p "Affinium Report integrations" -f / opt/Install/fastup_25_1/Platform/conf/upgrade1218to1219/SupersetConfig.xml</pre>
upgrade1219to12110	<pre>./configTool.sh -vp -p "Affinium Report integrations superset" -f / opt/Install/fastup_25_1/Platform/conf/upgrade1219to12110/SupersetLocaleIntegration.xml</pre>
upgrade12110to251	<pre>./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu" -f "/opt/Install/fastup_25_1/Platform/conf/upgrade12110to251/MaxAI_Menu.xml" -o ./configTool.sh -vp -ep "Affinium" -f "/opt/Install/fastup_25_1/Platform/conf/upgrade12110to251/MaxAI_configuration.xml"</pre>

	<pre>./configTool.sh -vp -p "Affinium AION navigation" -f "/opt/Install/fastup_25_1/Platform/conf/upgrade12110to2 51/MaxAI_configuration_property_value_override.xml" -o ./configTool.sh -vp -p "Affinium" -f / opt/Install/fastup_25_1/Platform/conf/upgrade12110to2 51/cdp_configuration.xml ./configTool.sh -vp -p "Affinium suite uiNavigation mainMenu" -f "/opt/Install/fastup_25_1/Platform/conf/upgrade12110to2 51/cdp_menu.xml " ./configTool.sh -vp -p "Affinium" -f / opt/Install/fastup_25_1/Platform/conf/upgrade12110to2 51/unicaPlusEnableConfig.xml</pre>
<p>upgrade25101to2511</p>	<pre>./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade25101to2511/SignSAML RequestConfiguration.xml " ./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade25101to2511/KafkaTop icPrefixConfiguration.xml " ./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade25101to2511/cdp_menu .xml "</pre>
<p>upgrde2511to261</p>	<pre>./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade2511to261/SignSAMLRe questConfiguration.xml " ./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade2511to261/KafkaTopic PrefixConfiguration.xml " ./configTool.sh -vp -p "Affinium" -f "<UNICA_PLATFORM_HOME>/conf/upgrade2511to261/cdp_menu.x ml "</pre>

Procedure: Fast upgrade Unica Campaign

Unica Campaign pre-upgrade

1. Import the Unica Campaign system tables backup from the old / base version to the system tables schema used in the clean 26.1.0 environment.
2. Take a File system backup of the `CAMPAIGN_HOME/partitions/partition(n)` directory.
3. Copy all the partitions data from the old environment's partition folders to the clean 26.1.0 environment Unica Campaign partition folder.

Upgrading Unica Campaign

1. Update the `setenv.sh` file with required values for the Unica Campaign upgrade. For details on environment variables in the `setenv.sh` file, refer to the Unica Campaign 26.1.0 Upgrade guide.

- a. Navigate to the path: `<installation path>/Campaign/tools/upgrade/25.1.1+To26.1.0/`

Set the following variables in the `setenv.sh` file:

Set `JAVA_HOME='<Installation Path >/jre'`

Set `CAMPAIGN_HOME='<Installation Path>/Campaign'`

Set `LOG_TEMP_DIR='<Installation Path>/Campaign/logs'`

Set `JDBCDRIVER_CLASSPATH=<JDBC DRIVER CLASSPATH>`

- b. Add the JVM Option “`-DFAST_UPGRADE_VERSION=<BASE_VERSION>`”

For example:

```
JAVA_OPTIONS="{JAVA_OPTIONS} -DFAST_UPGRADE_VERSION=10.1.0
```

- c. Supported versions in fast upgrade:

Upgrade from Version	JVM Option
10.1.x	-DFAST_UPGRADE_VERSION=10.1.x
11.0.x	-DFAST_UPGRADE_VERSION=11.0.x
11.0.1	-DFAST_UPGRADE_VERSION=11.0.1.x
11.1	-DFAST_UPGRADE_VERSION=11.1.x
12.1	-DFAST_UPGRADE_VERSION=12.1.x

2. Pre-requisite to complete before running the Unica Campaign upgrade tool: The `<CAMPAIGN_HOME>/install` directory “`jdbc.properties`” file contains the correct JDBC URL, Platform system database userID and encrypted password. User will need to copy paste `jdbc.properties` file from `Platform/tools/bin` directory to `Campaign/install` directory. If this information is incorrect Campaign upgrade tool will fail with database authentication related errors.

3. Execute Campaign "acUpgradeTool.sh". This Upgrade tool execution is similar to the usual acUpgradeTool execution. During the upgrade tool execution when prompted for "select base version to upgrade", you can see the upgrade version specified with the JVM option "-DFAST_UPGRADE_VERSION=<BASE_VERSION>". Select the fast upgrade base version to upgrade from.
4. Updating the JDBC files in Unica Campaign: In the application server, update the JNDI details (schema / SID, userid, password) for Campaign JNDI as per the new database schema used with 26.1.0 environment.

Campaign post-upgrade

Setting the Campaign – Help About > Version

1. Change the Unica Campaign version in the Unica Platform registration:
 - a. Export the version configuration using the following command on clean 26.1.0 environment: `./configTool.sh -x -p "Affinium|Campaign|about" -f <PLATFORM_HOME>/conf/campaign_about.xml`
 - b. Edit the `campaign_about.xml` file generated by the above command. Change the version to `26.1.0.0.GA_BUILD.<GA_BUILD>`. Replace this with build number referring to `version.txt` from installation location.

```
<property id="xxxxxx" name="releaseNumber" type="string_property" width="40">
  <value>26.1.0.0.GA_BUILD</value>
</property>
```

- c. Import the above edited file using the following command: `./configTool.sh -v -i -o -p "Affinium|Campaign" -f <PLATFORM_HOME>/Platform/conf/campaign_about.xml`
2. Execute the following command to upgrade Campaign Security Policies from the base version to version 26.1.0 and navigate to `<Platform_Home/tools/bin>`.

```
./populateDb.sh -n Campaign
```

Unica Campaign configuration changes

1. Campaign "Campaign REST API Filter" registration:
 - a. Navigate to the `PLATFORM_HOME/tools/bin` directory.

- b. Execute the following commands:

```
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_Filter.xml"
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_V2_Filter.xml"
configTool -v -i -p "Affinium|suite|security|apiSecurity|campaign" -f
"full_path_to_Campaign_installation_directory\conf\API_V3_Filter.xml"
```

2. Campaign "Engage REST API" registration:

- a. Navigate to the PLATFORM_HOME/tools/bin directory.
- b. Execute the following command: `./configTool.sh -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <CAMPAIGN_HOME>/conf/Engage_API_Filter.xml`

3. Optimize navigation registration

```
configTool -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "full_path_to_Campaign_installation_directory
\conf\optimize_navigation.xml"
```

4. Campaign struts Related Changes

In the upgrade of the MVC framework from Struts 1.3.8 to Spring 5.1.18, to fix Security vulnerability (in Struts 1.3.8) and to move to the current industry standard has caused changes in the extension of some of the urls mentioned in the configuration from ".do" to ".go". The following commands need to be executed to bring it to effect.

- a. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|settingsMenu|campaignSettingsItem" -f <CAMPAIGN_HOME>/conf/campaign_setup_navigation_spring_update.xml`
- b. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Optimize" -f <CAMPAIGN_HOME>/conf/campaign_navigation_optimize_spring_update.xml`
- c. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Offers" -f <CAMPAIGN_HOME>/conf/campaign_navigation_allOffers_spring_update.xml`
- d. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_doLogout_spring_update.xml`
- e. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Segments" -f <CAMPAIGN_HOME>/conf/campaign_navigation_allSegments_spring_update.xml`
- f. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Sessions" -f <CAMPAIGN_HOME>/conf/campaign_navigation_allSessions_spring_update.xml`
- g. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|All Campaigns" -f <CAMPAIGN_HOME>/conf/campaign_navigation_allCampaigns_spring_update.xml`
- h. `configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN_HOME>/conf/campaign_configuration_ext_doLogout_spring_update.xml`
- i. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_offerDetails_spring_update.xml`
- j. `configTool.bat -vp -o -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Monitoring Console" -f <CAMPAIGN_HOME>/conf/campaign_navigation_monitoring_console_spring_update.xml`
- k. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_displayOfferList_spring_update.xml`
- l. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_flowchartDetails_spring_update.xml`
- m. `configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN_HOME>/conf/campaign_configuration_ext_runOptimizeSession_spring_update.xml`
- n. `configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN_HOME>/conf/campaign_configuration_ext_stopOptimizeSessionRun_spring_update.xml`
- o. `configTool.bat -vp -o -p "Affinium|Campaign|unicaACOOptAdmin" -f <CAMPAIGN_HOME>/conf/campaign_configuration_ext_optimizeSessionProgress_spring_update.xml`

- p. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_optimize_sessionLinkClicked_spring_update.xml`
- q. `configTool.bat -vp -o -p "Affinium|Campaign|navigation" -f <CAMPAIGN_HOME>/conf/campaign_configuration_optimize_editOptimizeSchedule_spring_update.xml`

5. Change Campaign configurations in the Unica Platform configuration:

- a. Change the Campaign navigation URLs.
- b. Change the "serverHost" under Settings for 'unicaACLListener'(Affinium|Campaign|unicaACLListener).
- c. Change DSN under UA_SYSTEM_TABLES if required.
- d. Change the JNDI name under UA_SYSTEM_TABLES if required.
- e. Run the following queries on the Campaign system database Unica Campaign and CDM Integration after the installation is completed. This is mandatory step.

```
ALTER TABLE ua_contacthistory
ADD CHANNELNAME VARCHAR(255);

-- Step 1: Add nullable column

ALTER TABLE ua_contacthistory
ADD LOAD_TIMESTAMP TIMESTAMP;

-- Step 2: Populate existing rows
UPDATE ua_contacthistory
SET LOAD_TIMESTAMP = CURRENT_TIMESTAMP
WHERE LOAD_TIMESTAMP IS NULL;
COMMIT;

-- Step 3: Add NOT NULL + DEFAULT constraint
ALTER TABLE ua_contacthistory
MODIFY (
    LOAD_TIMESTAMP DEFAULT CURRENT_TIMESTAMP NOT NULL
);
```



Note: For user created Audience Level History tables, please update the query with the appropriate history table name and then execute it.

- f. Remap all system tables in the Campaign table mapping. This can be done using the following steps:
 - i. Stop the listener.
 - ii. Remove "unica_tblcache.mgr" from <CAMPAIGN_HOME>/partitions/partition/conf.
 - iii. Start the listener.
 - iv. Navigate to Campaign settings > Table mapping.
- g. Update the logging configuration by replacing `campaign_log4j.properties` with `campaign_log4j.xml`.
Settings for 'logging' (Affinium|Campaign|logging)
`log4jConfig ./conf/campaign_log4j.xml`

6. Platform – DBResourceBundle: The steps underneath will import resource bundles in Unica Platform. Execute the script underneath as specified:
 - a. Navigate to <platform_home>/tools/bin
 - b. DBResourceBundle.sh /bat -P Campaign -F <Campaign_home>/resourcebundles

Unica Campaign post-upgrade functional check

1. The Unica Campaign application navigation URL points to the old base environment. You must change this navigation URL to point to the target environment using the SQL script in the Unica Platform system database.
2. Perform UAT on Unica Campaign application. Ensure that all the flowchart are opening and the run is successful.

Configuring Unica Insights reports with Campaign

Complete the following steps.

1. Import Campaign Reports schemas in Platform configuration.
2. Run the following commands. Navigate to Platform_HOME/tools/bin directory.

```
configTool -v -i -o -p "Affinium|Report|about" -f "<CAMPAIGN_HOME>/reports/schema/config_version.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas" -f "<CAMPAIGN_HOME>/reports/schema/  
config_schemas_Campaign.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/  
camp_cust_attributes_template.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/  
camp_performance_template.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/  
offer_performance_template.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/  
camp_offer_response_breakout_template.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/templates/  
camp_offer_contact_status_breakout_template.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/base/  
camp_view.xml"
```

```
ConfigTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/  
camp_cust_attributes.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/  
camp_offer_response_breakout.xml"
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/
camp_offer_contact_status_breakout.xml "
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/
camp_performance.xml "
```

```
configTool -v -i -o -p "Affinium|Report|schemas|Campaign" -f "<CAMPAIGN_HOME>/reports/schema/custom/
offer_performance.xml "
```

3. Update Campaign data source in Unica Insights report design files using Unica Insights utility.

```
InsightsDBUtil -ds=CampaignDS -bPath="<Platform_Home>/Insights/Reports" -DBType=<databasetype>
-URL=<databasetype> -user=<database user> -pwd=<database password>
```

4. For Reports pack configurations, see the Unica Insights Reports Installation and Configuration guide.

Additional steps for Campaign Fast Upgrade

Please find below the additional steps that need to be performed for the Campaign upgrade, along with details mentioned in Unica 26.1.0 Fast Upgrade Guide.

Campaign upgrade directory is: `Campaign\tools\upgrade\25.1.1+To26.1`. User can continue to use the base upgrade versions as mentioned in the fast upgrade guide.

Procedure: Fast upgrade Unica Optimize

About this task

1. Optimize system tables are migrated while migrating Campaign system tables
2. Copy Optimize old session data from source environment to 26.1.0 environment:
 - a. Copy Optimize/partitions/partition1/reports content into Campaign/partitions/partition1/reports directory.
You will need to repeat this steps for each partition.
 - b. Copy Optimize/partitions/partition1/logs content into Campaign/partitions/partition1/logs directory.
 - c. Repeat the above steps for each partition.
3. Execute following script on Unica Campaign 26.1.0 system database:
 - a. Execute following script on Unica Campaign 26.1.0 system database:
 - 10.1 Updates --
 - < No script needed >
 - 11.0 Updates --
 - < No script needed >
 - 12.0 Updates --

< No script needed >

-- 12.1 Updates --

< No script needed >

- b. Do not perform the following step if you are upgrading from prior 12.0 version.. Execute the script that resides at the following location on the Unica Campaign 26.1.0 system database:

```
<CAMPAIGN_HOME>/ddl/aco_extra_indexes_<db>.sql
```

Setting the Unica Optimize Configurations

Change Unica Campaign configurations in the Unica Platform configuration:

- a. Change the "serverHost" in the Settings of 'unicaACOListener'(Affinium|Campaign|unicaACOListener)
- b. Remap all the system tables in the Unica Campaign table mapping. This can be done using following the steps:
 - Stop the listener.
 - Remove "unica_tblcache.mgr" from <CAMPAIGN_HOME>/partitions/partition/conf.
 - Start the listener.
 - Navigate to **Unica Campaign settings > Table mapping**.

Optimize post-upgrade functional check

Perform UAT on Optimize application. Ensure that all the sessions are opening and the run is successful.

About this task



Note: For versions 12.1.10 and higher, to execute Optimize sessions, users are required to apply for licenses. For more details, contact the HCL Support or Sales team.

Procedure: Fast upgrade Unica Interact

Before you begin

Complete the prerequisites to upgrade from Unica Interact 10.1.x later version to Unica Interact 26.1.0.

1. Ensure that Unica Platform and Unica Campaign are upgraded successfully on the target setup. Install Interact 26.1.0 on the setup.
2. Take a backup for source system Databases InteractDT, InteractRT, Interact Learning, Interact prod.
3. Make sure that the Interact related files in Campaign's 'partition' folder are copied from the source system to the target system.
4. Restore the backed up database schema on target system.

5. Create data sources on the target application server and point to the new database schema. You can use the same JNDI names as those in the source system to save effort in doing manual changes.



Note: Ensure that you keep the same target schema names as base setup schema names.

Upgrading Interact DT

Pre-Upgrade Configuration

Before running the upgrade tool, add configuration nodes using the following command: `./configTool.sh -i -p "Affinium"`

```
-f "INTERACTDT_HOME}/conf/interactDT_configuration.xml"
```



Note: You need to import the interactDT node if you are upgrading for versions before V12.1.5. For 12.1.6 and later, this step is not required as 'Interact Design Time (InteractDT) separation' changes are supported by default.

1. Update `setenv.sh` with the values required for upgrade. For details on the environment variables in the `setenv.sh` file, see the Interact Upgrade guide.

- a. Navigate to the path: `<InteractDT_Home>\tools\upgrade\` and set the following variables in the `setenv.sh` file:

```
set JAVA_HOME='<Installation Path >/jre'
```

```
set JDBCDRIVER_CP=Actual location of the databasedriver along with database driver
```

For example: `set JDBCDRIVER_CP=/opt/HCL/FastUpgrade12/ojdbc8.jar`

```
set JDBCDRIVER_CLASS=Database driver
```

```
set JDBCDRIVER_URL=Database URL
```

- b. Change the log file name and location if required.
- c. Navigate to `<InteractDT_Home>\tools\upgrade\conf`.
- d. Edit file `ACIUpgradeTaskList.properties` and change the value of `CHOICES_FOR_PREVIOUS_VERSIONS=10.1.0` or other base version you are upgrading from.



Note: If `CHOICES_FOR_PREVIOUS_VERSIONS` is already present that you are upgrading from, then do not change in the value.

For `setenv.sh`, you must update the username to the actual user who runs the tool.

For example: you are required to update this entry `- $whoami != "root" to $whoami != "username"`

Here is the list of supported choices for previous version selection. Users can select the relevant one.

- 10.1.0
- 11.0.1
- 11.1.0
- 12.0.0
- 12.1.x
- 25.1.0

2. Complete the below prerequisites before running the Interact upgrade tool.

Update the jdbc.properties file under:

```
<InteractDT_Home>\tools\upgrade\conf
```

The "jdbc.properties" file must contain the correct JDBC URL, Platform system database userID and encrypted password. If this information is incorrect, then the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool.sh/bat". This Upgrade tool execution is similar to the usual acUpgradeTool execution of Campaign.
4. While executing the upgrade tool you are prompted for database details. Enter the Interact DesignTime database details.
5. The tool will also prompt for "select base version to upgrade". You will able to see the upgrade version specified for `CHOICES_FOR_PREVIOUS_VERSIONS`.
Select the fast upgrade base version to upgrade from.
6. Once the upgrade tool execution completes, check the related logs to ensure that no errors were encountered during the upgrade tool execution.

Issues Observed During Upgrade Execution

About this task

Issue 1: Duplicate Column Error (FIELDSTYPE)

Error Message:

```
ERROR upgradeTool.ACMigSysDBUpgradeTask [] - SQL execution failed:
DB2 SQL Error: SQLCODE=-612, SQLSTATE=42711, SQLERRMC=FIELDSTYPE, DRIVER=4.16.52
```

The column FIELDSTYPE already exists in the database schema, likely due to a previous or partial upgrade.

Workaround:

This error can be safely ignored. It does not impact the upgrade process or data integrity.

Issue 2: Exceeding DB2 Column Limit in PRIMARY KEY / INDEX

Error Message:

```
ERROR upgradeTool.ACMigSysDBUpgradeTask [] - SQL execution failed:
DB2 SQL Error: SQLCODE=-613, SQLSTATE=54008, SQLERRMC=IOFFERMAPPINGSG_PK, DRIVER=4.16.52
```

This error is triggered when the number of columns or their combined length in a PRIMARY KEY, UNIQUE constraint, or index exceeds the DB2 maximum.

Specifically, the following columns are problematic due to their length:

Description VARCHAR2(1536) NULL

FilterDetails VARCHAR2(6144)

DB2/Oracle has strict limits on the maximum index key length, which can be exceeded by long VARCHAR fields.

Workaround:

Reduce the size of the columns in the database schema before re-running the upgrade.

Upgrading Interact RT, Interact learning and Interact Production databases

1. Update setenv.sh with required values for Unica Interact upgrade. For details on the environment variables in the setenv.sh file, see the Unica Interact Upgrade guide.

- a. Navigate to <Interact_Home>/tools/upgrade. Set the following variables in the setenv.sh file:

```
set JAVA_HOME= <Installation Path>/jre
```

```
set JDBC_DRIVER_CP= Actual location of the database driver along with database driver
```

```
ex: set JDBC_DRIVER_CP= /opt/HCL/FastUpgrade12/ojdbc8.jar
```

```
set JDBC_DRIVER_CLASS = Database driver
```

```
set JDBC_DRIVER_URL = Database URL
```

The database URL can be the same in DB2 and Oracle if you are using the same DB with different schemas.

In case you require to update the database URL for the SQLServer, update the respective DB before executing the upgrade tool.

Change the log file name and location if required.

- b. Navigate to <Interact_Home>\tools\upgrade\conf, edit the ACIUpgradeTaskList_crhtab.properties file, and change the value of CHOICES_FOR_PREVIOUS_VERSIONS=10.1.0 or other base version you are upgrading from.



Note: If `CHOICES_FOR_PREVIOUS_VERSIONS` is already present that you are upgrading from, then do not make change in the value.

- c. Repeat the above change for the `ACIUpgradeTaskList_Irntab.properties`, `ACIUpgradeTaskList_runtab.properties`, `ACIUpgradeTaskList_usrtab.properties` files at the above mentioned path.

For `setenv.sh`, you must update the username to the actual user who runs the tool.

For example: you are required to update this entry - `$whoami != "root" to $whoami != "username"`

Here is the list of supported choices for previous version selection. Users can select the relevant one.

- 10.1.0
- 11.0.1
- 11.1.0
- 12.0.0
- 12.1.x
- 25.1.0

2. Pre-requisite to complete before running the Interact upgrade tool: Update the `jdbc.properties` file under:

`<Interact_Home>\tools\upgrade\conf`

The "jdbc.properties" file must contain the correct JDBC URL, Platform system database userID and encrypted password. If this information is incorrect, the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool_crhtab.sh/bat" . This Upgrade tool execution is similar to the usual aciUpgradeTool.
 - a. While executing the upgrade tool you are prompted for database details mention the details of the Interact DesignTime Database. The tool will also prompt for "select base version to upgrade". You will see the upgrade version specified with `CHOICES_FOR_PREVIOUS_VERSIONS=` Select the fast upgrade base version you are upgrading from.
 - b. Once the upgradetool execution completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.
4. Execute Interact "aciUpgradeTool_runtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
 - a. While executing the upgrade tool you are prompted for database details. Enter the Interact RunTime Database details. The tool will also prompt for "select base version to upgrade", you can see the upgrade version specified in `CHOICES_FOR_PREVIOUS_VERSIONS`. Select the fast upgrade base version you are upgrading from.
 - b. Once the upgradetool execute completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.
5. Execute Interact "aciUpgradeTool_Irntab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
 - a. While executing the upgrade tool you are prompted for database details. Enter the Interact Learning Database details. The tool will also prompt for "select base version to upgrade". You can see the upgrade version specified with `CHOICES_FOR_PREVIOUS_VERSIONS`. Select the fast upgrade base version to upgrade from.
 - b. Once the upgradetool execution completes, check the related logs and ensure that errors were not encountered during the upgrade tool execution.

6. Execute Interact "aciUpgradeTool_usrtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.
 - a. During the execution of the upgrade tool, you are prompted for database details. Enter the Interact Production/prod Database details. The tool will also prompt for "select base version to upgrade". You can see the upgrade version specified with `CHOICES_FOR_PREVIOUS_VERSIONS`. Select the fast upgrade base version to upgrade from.
 - b. Once the upgradetool execution completes, check the related logs and ensure no errors were encountered during the upgrade tool execution.

Execute ILPB Migration Utility

About this task

See the Unica Interact Upgrade Guide for more details.

Execute Strategy migration utility

About this task

See the Unica Interact Upgrade Guide for more details.

Updating the JDBC file in InteractRT WAR

About this task

In case you do not want to reuse the Platform schema used in the 26.1.0 clean installation and rather want to use another user schema, follow the additional steps underneath:

1. Take a back up of the interactRT.war file from the 26.1.0 environment (Interact/interactRT.war).
2. Unwar the interactRT.war file.
3. Copy the jdbc.properties file from Platform/tools/bin/ directory and paste it under interactRT.war/WEB-INF/classes.
4. Re-war the interactRT.

Post Upgrade

1. Register Interact DT Rest API Filter V2. Navigate to the `PLATFORM_HOME/tools/bin` directory. Execute the following commands:

```
configTool.bat -vp -p "Affinium|suite|security|apiSecurity|interact" -f <Interact_Home>\InteractDT\conf  
\Interact_API_V2_Filter.xml
```

2. Interact version registration:

- a. Execute the following command on the source environment and navigate to the `PLATFORM_HOME/tools/bin` directory. Execute the command: `./configTool.sh -x -p "Affinium|Interact|about" -f Interact_about.xml`
- b. Update the product name from 'IBM Interact' to 'Unica Interact' in the 'Interact_about.xml' file.



Note: Do not update the product name if you are upgrading from 11.0 -> 11.x in the Interact_about.xml file.

- c. Copy the exported output to the 26.1.0 - Destination system under the `PLATFORM_HOME/tools/bin` directory.
- d. Modify the version information in "Interact_about.xml" file referring to the Interact version in version.txt.
For example: `<value>26.1.0.<Build number as per version.txt></value></property>`.

- e. Update the following property.

```
<property id="6260" name="java" type="string_property" width="40">
    <value>IBM Corporation 2.4</value>
</property>
```

to

```
<property id="6260" name="java" type="string_property" width="40">
    <value>HCL Technologies Ltd.</value>
</property>
```

- f. Execute the following command on the destination 26.1.0 environment: `./configTool.sh -v -o -i -p "Affinium|Interact" -f Interact_about.xml`
- g. For the Interact sub component version, execute the following commands on the destination 26.1.0 environment.

Navigate to the `PLATFORM_HOME/tools/bin` directory.

Execute command: `./configTool.sh -i -p "Affinium|Campaign|about|components" -f <INTERACT_HOME>/InteractDT/conf/interact_subcomponent_version.xml -o`

- 3. This step is not required if you are upgrading from 11.x version. You must update the old Interact navigation with a new one.
- 4. Execute the following commands on the destination 26.1.0 environment:

Remove old menu: `configTool.bat -d -p "Affinium|suite|uiNavigation|mainMenu|Campaign|Interactive Channels" -o`

Add the new menu:

```
configTool.sh/bat -i -p "Affinium|suite|uiNavigation|mainMenu" -f "
full_path_to_InteractDT_installation_directory/conf/interact_navigation.xml"
```

- 5. Register Unica Interact settings as configuration menu under "Affinium|suite|uiNavigation|settingsmenu" using `full_path_to_Interact_installation_directory/interactDT/conf/interact_setup_navigation.xml`. Use the following command.

```
./configTool.sh -v -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "/opt/HCL/v251_to_25101_FastUpgrade_ORA/InteractDT/conf/interact_setup_navigation.xml"
```

6. Platform – DBResourceBundle: The following steps imports resource bundles in Unica Platform. Execute the script underneath as specified:

- a. Navigate to `<platform_home>/tools/bin`.
- b. Run this command. `DBResourceBundle.sh /bat -P interact-F <Interact_home>/resourcebundles`
- c. Additional steps for InteractDT Menu in left Nav pane

```
cd <PLATFORM_HOME>/tools/bin ./populateDb.sh -n InteractDT ./configTool.sh -vp -p "Affinium|
suite|security|apiSecurity|interact" -f /opt/HCL/FastUpgrade_Oracle19c/InteractDT/conf/
Interact_API_V1_Filter.xml
```

7. If you have added any custom entries in the 'interact_log4j.xml' file on source 10.1.x setup, then you must copy those custom entries into the target setup in the newly added 'interact_log4j2.xml' file.
8. Deploy Interact RT and Interact DT WAR file.
9. Update the configuration instanceURLs accordingly for your ServerGroup defined at `Affinium|Campaign|partitions|partition1|Interact|serverGroups`.

The second Interact runtime

1. Repeat the following steps for each Interact runtime if you have used a different server group and Platform.
2. Install new Platform 26.1.0 with Interact RT.
3. Perform the Platform upgrade and make the setup ready. Refer the Platform Upgrade Guide.
4. Copy and restore the InteractRT database from the source to the target.
5. Upgrade the database from source database to 26.1.0 by running the aciupgrade utility for RT.
6. Create data sources on the target application server using the same JNDI names as the source setup.
7. Deploy InteractRT.war.

Important

CFS updates: If the customer is using SOAP, then generate the proxy code based on the new WSDL and rebuild the CFS code using the new proxy.

Notes

- After Upgrade, it is observed that a Configuration Node sessionManagement is displayed under: `Affinium|interact|`. Removal of this configuration can be done using the Platform `configTool.sh/configTool.bat` tool.
- After upgrade, it is observed that configuration Node treatmentStore is displayed under `Affinium|Interact|services|contactHist|`. Removal of this configuration can be done using the Platform `configTool.sh/configTool.bat` tool.
- In case, after deployment during access you encounter the `DB2 SQL Error: SQLCODE=-668, SQLSTATE=57016, SQLERRMC=7` error, then contact your DBA and run the REORG query on the necessary database tables.
- Removal steps are not applicable if you are upgrading from 11.x to 12.0.

Configure Unica Insights reports with Interact

Complete the following steps.

1. Import Interact Reports schemas in Platform configuration.

Navigate to "<INTERACT_HOME>/reports/tools".

Run the `import_all.sh/bat` script.

2. For Reports pack configurations, see the Unica Insights Reports Installation and Configuration guide.

Procedure: Fast upgrade Unica Deliver

About this task

To perform the fast upgrade of Unica Deliver from 10.1.x, 11.x.x, 12.x.x, and 25.x.x to 26.1.0, complete the following steps:

1. Open a command prompt and navigate to <PLATFORM_HOME>/tools/bin and execute the following commands.

```

° configTool.bat / sh -u eMessage
° configTool.bat / sh -d -p "Affinium|Campaign|partitions|partition1|server|internal|eMessageInstalled"
-o
° configTool.bat / sh -d -p "Affinium|Campaign|partitions|partition1|eMessage" -o
° configTool.bat / sh -r Deliver -f "<CAMPAIGN_HOME>\Deliver\conf\deliver_configuration.xml"
° configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "<CAMPAIGN_HOME>\Deliver
\conf\deliver_op_odsettings_navigation.xml"
° configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>
\Deliver\conf\deliver_op_mailings_navigation.xml"
° configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>
\Deliver\conf\deliver_op_documents_navigation.xml"
° configTool.bat / sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<CAMPAIGN_HOME>
\Deliver\conf\deliver_op_analytics_navigation.xml"
° configTool.bat/sh -v -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "<CAMPAIGN_HOME>/
Deliver/conf/deliver_op_new_documents_navigation.xml"

```

2. Log in to Platform and navigate to **Settings > Configuration**.

3. Navigate to Affinium|Campaign|partitions|partition1|Deliver and provide value for `deliverPluginJarFile` as following.

```
deliverPluginJarFile <CAMPAIGN_HOME>/Deliver/plugin/deliverplugin.jar
```

4. Navigate to Affinium|Campaign|partitions|partition1|server|internal and enable

```
DeliverInstalled= yes.
```

5. Navigate to Affinium|Deliver|partitions|partition1|dataSources|systemTables and configure `systemTables` properties as per your Campaign schema.

6. Assign `UNICA_HOSTED_SERVICES` datasource to `asm_admin` user with appropriate account and its password.

Ensure to take a backup of Campaign system table schema before executing the next steps.

7. Navigate to <CAMPAIGN_HOME>\Deliver\ddl and execute `ace_op_drop_systab_ora.sql`, if you possess Oracle Campaign system schema, else execute `ace_op_drop_systab.sql` on Campaign system schema.
8. Navigate to <CAMPAIGN_HOME>\Deliver\ddl\unicode and execute `ace_op_systab_<DB_TYPE>.sql` on Campaign system schema.
9. Navigate to <CAMPAIGN_HOME>\Deliver\ddl and execute `ace_op_populate_systab_<DB_TYPE>.sql` on Campaign system schema.
10. Restart web app server and listener.

To perform the fast upgrade of Unica Deliver from Version 12.1.x to 26.1.0 , complete the following steps.

Execute Below scripts on Target 26.1.0 Campaign schema:

Upgrade From base version - 12.1.x to26.1.0	SQL scripts to execute
Maria DB	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_mariadb.sql
Oracle	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_ora.sql
Sql Server	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_sqlsvr.sql
DB2	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_db2.sql
Postgres	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_postgresql.sql
Maria DB - unicode	<Campaign_Home>\tools\upgrade\12.1+To25.1/ace_upgrade_mariadb_unicode.sql
Oracle - unicode	<Campaign_Home>\tools\upgrade\12.1+To25.1/ace_upgrade_ora_unicode.sql
Sql Server - unicode	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_sqlsvr_unicode.sql
DB2 - unicode	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_db2_unicode.sql
Postgres-unicode	<Campaign_Home>\tools\upgrade\12.1+To26.1.0/ace_upgrade_postgresql_unicode



Note: Please ignore if there are errors stating table already exists or cannot change <Column_name> used in a foreign key constraint.

- a. Generate and configure public / private key pair for SFTP authentication. Refer *Chapter 3. Connections to message services* from https://doc.unica.com/products/deliver/26_1_0/en_us/UnicaDeliver26_1_0StartupAdminGuide_en_us.pdf for complete steps. (If target VM is separate / different VM than source) and share with Unica Deliver Devops.
- b. Login to Unica Platform and configure SystemTables by navigating to `Affinium|Deliver|partitions|partition1|dataSources|systemTables`. Specify target unica campaign 26.1.0 schemaName and jdbcURI.
- c. Navigate to `Affinium|Campaign|partitions|partition1|Deliver` and give correct path for deliverPluginJarFile.
- d. Restart Campaign and Platform.
- e. Start RCT (Make sure to stop RCT from base Environment).

Procedure: Fast upgrade Unica Plan

Plan pre-upgrade

1. Import the Plan system tables backup from the old version to the system tables schema used in a clean 26.1.0 environment.
2. Take a file system backup of the source and the destination of the following folders:

`<PLAN_HOME>/accountattachments` directory.

`<PLAN_HOME>/approvalitems` directory.

`<PLAN_HOME>/assets` directory.

`<PLAN_HOME>/componentattachments` directory.

`<PLAN_HOME>/images` directory.

`<PLAN_HOME>/invoiceattachments` directory.

`<PLAN_HOME>/planattachments` directory.

`<PLAN_HOME>/programattachments` directory.

`<PLAN_HOME>/projectattachments` directory.

`<PLAN_HOME>/templates` directory.

3. Copy or merge all files mentioned in step 2 from the source folders to the destination Plan respective folders.
4. In the source version, if you have customized the `plan_log4j.xml` file and `plan_ehcache.xml` file, copy the `plan_log4j.xml` file and `plan_ehcache.xml` file to `Plan_HOME/conf` folder of the destination environment. Adhere to the following guidelines:

- For the `plan_log4j.xml` file, if the source version is earlier than 11.1.0, ensure that the `plan_log4j.xml` file follows `log4j2` conventions. For more information, see the *Unica Plan Installation Guide*.
- For the `plan_ehcache.xml` file, ensure that you add the attribute-value pair `name="PlanEhCacheManager"`, as shown in the following example, if it does not exist:

```
<ehcache updateCheck="false" name="PlanEhCacheManager">
```



Note: You can ignore *Step 4* if you have not made any changes to the `plan_log4j.xml` file and `plan_ehcache.xml` file in the source version, and if you want to retain the target file without any modifications.

5. On the destination server (at the `/messages/com/hcl/umo/` path), rename the `ext` folder to `ext_data`.
6. For Unica Plan version prior to 12.1.0, copy the `ext` folder from the source location `/messages/com/ibm/umo/` and paste it to the destination location `/messages/com/hcl/umo/`. For Unica Plan version 12.1.0 and later, copy the `ext` folder from the source location `/messages/com/hcl/umo/` and paste it to the destination location `/messages/com/hcl/umo/`.



Attention: You must copy only the `ext` folder from the source location and paste it in the destination location. Do not copy the parent folder.

7. If there are marketing objects in the source setup, copy the following files from the source location `<PLAN_HOME>/conf/en_US` to the target location. `mo_creatives_state.xml` `globalstates.xml` `sysmenu.xml` `sysmodules.xml`
8. In `<PLAN_HOME>/conf/xx_XX/sysmenu.xml` (where `xx_XX` is the locale) change the value of `<display>` to `Plan` (see the following xml section).

```
<sysmenu>
  <menugroups>
    <default-startup-item>projectmanagement</default-startup-item>
    <menugroup id='projectmanagement'>
      <display>Plan</display>
    </menugroup>
  </menugroups>
</sysmenu>
```

9. In `<PLAN_HOME>/conf/resourcebundles/com/unica/manager/configuration/plan*.properties` files, if the version of existing Unica Plan installation is before 12.1.10, update the value of `MARKETING_OPERATIONS_SETTINGS` to `Plan settings`.
10. In `<PLAN_HOME>/conf/en_US/sysmodules.xml` (where `en_US` is the locale), change the value of `<display>` to `Plan` (see the following xml section).

Run the following commands at:

```
<sysmodules>
  <section>
    <module id='Analytics'>
      <display>Plan analytics</display>
    </module>
  </section>
</sysmodules>
```

11. Run the following command to register plan configuration:

```
./configTool.sh -vp -p "Affinium" -f< <PLAN_HOME>/conf/plan_registration.xml
```

Upgrading Unica Plan

Updating JDBC files

About this task

In case you do not want to reuse the Plan schema used in the 26.1.0 clean installation and rather want to use another user schema, follow the additional steps underneath:

1. Take a back up of the `jdbc.properties` file from the 26.1.0 environment (`Plan/tools/bin/umo_jdbc.properties`). Update the username of the 26.1.0 Platform system database / schema name in the `umo_jdbc.properties` file.

Example of `umo_jdbc.properties`:

Name: `umo_data_source.url`

Description: URL reference for the Unica Plan system table database.

Example values for supported databases are:

SQL Server: `jdbc:sqlserver://sqlserverHost:1433;databaseName=databaseName`

IBM DB2: `jdbc:db2://db2Host:50000/databaseName`

Oracle: `jdbc:oracle:thin:@oracleHost:1521:databaseName`

`umo_data_source.url=jdbc:oracle:thin:@<databaseHostName>:1521:<sid>`

Name: `umo_data_source.login`

Description: Name of login for Unica Plan database-login account must have database administrative rights.

Name of login for Unica Plan database. login account must have database administrative rights.

`umo_data_source.login=xmsp`

Name: `umo_data_source.password`

Description: Password for Unica Plan database for login id provided in `umo_data_source.login` property

`umo_data_source.password=ENC(+1Kd731xEuzqdFqjQ9wnw==)`



Note: If you have used the same user in the Platform and Plan, you can take the encrypted password from the `Platform/tools/bin/jdbc.properties` file.

2. Under `<PLAN_HOME>/tools/bin`, update the `setenv.bat` file with the correct DB driver path for the parameter `DBDRIVER_CLASSPATH`.

Upgrade to 26.1.0 config

About this task

Note: This procedure is not applicable to Fast Upgrade from version 12.1.10 to version 26.1.0.

1. Add `jBoss-logging-3.4.1.Final.jar` and `classmate-1.5.1.jar` in CLASSPATH in `setenv`. These files are located in `<Platform_HOME>/tools/lib`.

For example: You can add like following in the classpath

```
${TOOLS_LIB}/../../../../Platform/tools/lib/jboss-logging-3.4.1.Final.jar:${TOOLS_LIB}/
../../../../Platform/tools/lib/classmate-1.5.1.jar
```

2. Run the following commands at `Platform_Home/tools/bin`:

```
./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>/conf/plan_approvals_settings_10.1.0.0.xml
```

```
./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>/conf/
plan_workflowservice_settings_10.1.0.0.xml
```

3. Run `config_migration.sh` in `<PLAN_HOME>/tools/bin`. Prerequisite: Set or update `<UMO_HOME>` in the `config_migration.sh` file.

```
./config_migration.sh -p <PLAN_HOME> -b 10.1.0.0 (Replace 10.1.0 with your existing source version.)
```

4. Run the following command to enable encodeCSV feature:

```
configTool -vp -p "Affinium|Plan|umoConfiguration" -f <PLAN_HOME>\conf\Plan_encodeProperty_11.1.xml
```



Note: Ensure that the `jdbc.properties` file within the `<PLAN_HOME>/install` location points to the appropriate Unica Platform database.

Upgrading Plan database

Before you begin

Before executing the commands that follow, ensure that you have properly executed all the steps mentioned in [Plan pre-upgrade on page 35](#).

1. Import the database with the source system tables of the VM containing the fresh installation of 26.1.0 Plan.

- a. Run the `umouilistupgrade` utility from `<PLAN_HOME>/tools/bin` to merge the `UMOConfigurationMessages_<locale>.properties` and the `UMOMktObjectConfigurationMessages_<locale>.properties` of 10.1 and 26.1.0. This utility does not have any parameters: `umouilistupgrade.bat`.

- b. Run the `umodbsetup` utility to upgrade the database to 26.1.0: `umodbsetup.bat -t upgrade -m -b 10.1 -L en_US`. Type the above command in the command prompt. Copying may give an error.

- c. Execute the command: `umodbsetup.bat -t upgrade -b 10.1` . If this does not work, you can execute the `umo_upgrade_[10.1.0.0.0]_[26.1.0.0].sql` file on the Plan database. This file is located at `<PLAN_HOME>\tools\bin`.



Note: Replace 10.1 with your existing source version

2. If the version of the target system is 26.1.0 or later, execute the following query on Platform database to update the name of the Marketing Operations node to Plan, in Platform configurations:

```
UPDATE usm_configuration SET display_name='Plan' where internal_name='Plan' and
display_name_key='Marketing Operations'
```

Unica Plan post-upgrade

Unica Plan Configuration changes

About this task

Deploy Unica Plan 26.1.0 war and run the Unica Plan Java Upgrade using the following procedure:



Note:

About `log4j` upgrade

Prior to 11.1, `log4j1x` API was used by the Plan source.

For 11.1 and later versions

- The syntax of `<PLAN_HOME>/conf/plan_log4j.xml` has been changed to `log4j2` format.

The configuration file contains the following lines at the top:

```
<?xml version="1.0" encoding="UTF-8"?>
<Configuration packages="com.unica.afc.logger" monitorInterval="60">
```

Prior to upgrade to 26.1.0, if you had upgraded Unica Plan version to 11.1, a file `plan_log4j.11.1.0.0.xml` is available in the `<PLAN_HOME>/conf/` location, which contains the earlier mentioned syntax.

In this case, the syntax of `plan_log4j.xml` file in the `<PLAN_HOME>/conf/` location would not be as per `log4j2` format

In such a case the file `plan_log4j.11.1.0.0.xml` should be used in the following properties:

- `-Dlog4j2.configurationFile`
- `-Dlog4j.configurationFile`



Note:



In case of 12.1.0.4 and higher, `plan_log4j.11.1.0.0.xml` should be used in the following properties:

- `-Dplan.log4j.config=<Plan_home>\conf\plan_log4j.11.1.0.0.xml`

- `log4j2x` API is used by Plan source.
- `log4j1x` API is still used by `unica_common.jar` inside Plan JVM, because the Platform source (which results in `unica_common`) has not been changed to use `log4j2x`. For this reason, we provide the `plan_log4j_1x.xml`, which is as per the `log4j1x` syntax. This file is not used by the source code in Unica Plan (this is valid only till version 12.1.0.3 and not for later versions).

1. Log in as an admin user.
2. In (Affinium|Plan|umoConfiguration) update the location for the nodes listed underneath:

templates

attachmentFolders

integrationServices

3. Update `notifyPlanBaseURL` in Affinium|Plan|umoConfiguration|notifications.
4. Update `serverURL` in Affinium|Plan|navigation.
5. If the new application URL is different than the old one, then you must connect to Plan database and access `UAP_WS_ALERTS` table. Records in this table may contain the pre upgrade application URL. You need to update this table and replace the old application URL by new one.

Sample query for reference

```
select * from UAP_WS_ALERTS where message like '%eagle%'
UPDATE UAP_WS_ALERTS
SET MESSAGE = REPLACE(
    MESSAGE,
    'http://eagle153.nonprod.hclpnp.com:9080/plan',
    'http://comp-4994-1.nonprod.hclpnp.com:1200/plan'
)
WHERE MESSAGE LIKE '%http://eagle153.nonprod.hclpnp.com:9080/plan%';
```

6. Restart the application server.
7. Go to **Settings > Plan > Plan Upgrade**.
8. Select all the checkboxes.
9. Click the "Upgrade" button.
10. Perform the following steps:
 - a. Access the file `systemenu.xml` from the `conf/locale` location.
 - b. In the file, if you find `conf/locale/<menugroup id="projectmanagement">`, remove the `<menugroup id="Operations">` section within it, and rename `<menugroup id="projectmanagement">` as `<menugroup id="Operations">`.

c. In the file, if you find `conf/locale/<menugroup id="financialmanagement">`, rename `<menugroup id="financialmanagement">` as `<menugroup id="Financials">`.

d. Perform *Step b* for all locales.

e. Restart the Plan web application.

f. From the Unica Platform homepage, navigate to **Settings > Plan Settings**

Result

The **Administrative settings** page appears.

g. Inside **System administration** settings and within **Restricted options**, select **Synchronize menus**.

11. Restart Unica Platform and Unica Plan.

Setting the Plan – Help About > Version

About this task

Change the plan version in the Unica Platform registration:

1. Export the version configuration using the following command on clean 26.1.0 environment.
`configTool.sh -x -p "Affinium|Plan|about" -f <PLATFORM_HOME>/conf/plan_about.xml`
2. Edit the `plan_about.xml` file generated by the above command. Change the version to `26.1.0.0.GA_BUILD`.

```
<property id="xxxxxx" name="releaseNumber" type="string_property" width="40">
<value>26.1.0.0.GA_BUILD</value>
</property>
```

Change display name as below:

```
<property id="3214" name="displayName" type="string_property" width="40">
  <value>Unica Plan</value>
</property>
```

3. Import this edited xml file using the following command:

```
configTool.sh -v -i -o -p "Affinium|Plan" -f <PLATFORM_HOME>/conf/plan_about.xml
```

Plan Post Upgrade Functional check

About this task

Perform UAT on the plan application. Ensure that all the Plans, Programs, Projects, Tasks, Approvals are opening and that the data is successfully imported. Ensure if all the configurations nodes are available.

Configure Unica Insights reports with Plan

For Reports pack configurations, see the *Unica Insights Reports Installation and Configuration* guide.

Procedure: Fast Upgrade Unica Journey

Note: If you already have Journey, you can perform a Fast Upgrade only if your existing version is 12.1.7, 12.1.8, or 12.1.9. If your existing version is earlier than 12.1.7, contact Unica support for a utility to perform the Fast Upgrade.

Before you begin

1. Ensure that Unica Platform is upgraded successfully on the target setup.
2. Install Journey 26.1.0 on the target setup.
3. Take a backup for base Journey system database and Journey report database.
4. Ensure that the Journey files folder (`<Journey_installation_Location>/Files`) are copied from the base system to the target system.
5. Ensure that the base Kafka logs files are copied from base to target setup.
6. Drop the Journey system schema and report schema and create new schema.
7. Restore the backed up database schema on target system.



Note: We recommend that you maintain the same schema names for Journey system schema and Journey report schema.

8. The operating system must be same (Linux-to-Linux / Windows-to-Windows). Cross operating system migration is not supported.



Attention: Ensure that you back up the Ignite base work directory for Web and Engine.



Note: If you use different schema names other than target schema name, perform all the suggested database upgrade steps and update the same database schema names in the application server files and the engine `application.properties` file.

Upgrading the Unica Journey database manually

About this task

Once the base Journey database (Journey system and Journey report) is restored on the target database, depending on the provided upgrade path, perform the following steps for executing delta database scripts:

1. For Source Version 12.1.7 and Upgrade Path 12.1.7 to 26.1.0:
Run the SQL scripts, specific to your database setup, from the mentioned location on the target database. Ensure that the source database is restored on the target database setup.

Example: If your database setup has MariaDB, run the following scripts:

- From the `<Journey_installation_Location>/Web/ddl/upgrade1217to1218/` location, run the `journeyMariaDBUpgrade12.1.8.sql` on Journey system database.

- From the `<Journey_installation_Location>/Web/ddl/upgrade1218to1219/` location, run the `journeyMariaDBUpgrade12.1.9.sql` script on Journey system database, and run the `journeyReportMariaDBUpgrade12.1.9.sql` script on Journey report database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade1219to12110/` location, run the `journeyMariaDBUpgrade12.1.10.sql` on Journey system database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade12110to251/` location, run the `journeyMariaDBUpgrade25.1.sql` on Journey system database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade25101to2511/` location, run the `journeyMariaDBUpgrade26.1.0.sql` on Journey system database.

2. For Source Version 12.1.8 and Upgrade Path 12.1.8 to 26.1.0:

Run the SQL scripts, specific to your database setup, from the mentioned location on the target database. Ensure that the source database is restored on the target database setup.

Example: If your database setup has MariaDB, run the following scripts:

- From the `<Journey_installation_Location>/Web/ddl/upgrade1218to1219/` location, run the `journeyMariaDBUpgrade12.1.9.sql` script on Journey system database, and run the `journeyReportMariaDBUpgrade12.1.9.sql` script on Journey report database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade1219to12110/` location, run the `journeyMariaDBUpgrade12.1.10.sql` on Journey system database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade12110to251/` location, run the `journeyMariaDBUpgrade25.1.sql` on Journey system database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade25101to2511/` location, run the `journeyMariaDBUpgrade26.1.0.sql` on Journey system database.

3. For Source Version 12.1.9 and Upgrade Path 12.1.9 to 26.1.0:

Run the SQL scripts, specific to your database setup, from the mentioned location on the target database. Ensure that the source database is restored on the target database setup.

Example: If your database setup has MariaDB, run the following scripts:

- From the `<Journey_installation_Location>/Web/ddl/upgrade1219to12110/` location, run the `journeyMariaDBUpgrade12.1.10.sql` on Journey system database.
- From the `<Journey_installation_Location>/Web/ddl/upgrade12110to251/` location, run the `journeyMariaDBUpgrade25.1.sql` on Journey system database.

- From the `<Journey_installation_Location>/Web/ddl/upgrade25101to2511/` location, run the `journeyMariaDBUpgrade26.1.0.sql` on Journey system database.

Here, the target database is ready with database upgrade scripts.

4. Run the Database Migration utility (only if the source version is earlier than 12.1.9):

From the `<Journey_installation_location>/tools` location, open the `migration.properties` file and provide the following details:

- Database Type
- Database URL
- Database_Username
- Database_Password
- Journey_Base_Vesion
- Journey_Current_Vesion

5. Run the `DataMigrationUtility.jar` file using the following command and verify if the migration utility is successful:

```
java -jar DataMigrationUtility.jar <Fully qualified path of the Migration.properties file>
```

Fast Upgrade

1. Copy the Ignite work directory from Source System to Target System of Web and Engine.

Location:

- `/<Journey_Installation_Location>/Web/ignite`
- `/<Journey_Installation_Location>/Engine/temp`

2. In the application server, update the JNDI details (`schema / SID, userid, password`) for Journey JNDI as per the new database schema used with version 26.1.0 environment.
3. Provide the correct path of the Ignite and temp work directory in `application.properties` of Web and Engine.
4. As mentioned earlier, ensure that the Journey files folder (in the location `<Journey_installation_Location>/Files`) are copied from the source system to the target system.
5. As mentioned earlier, ensure that the source Kafka logs are copied from the source setup to the target setup.
6. Start the kafka services and ensure that the kafka services have started error-free.

Setting the Journey – Help About > Version

About this task

Change the Unica Journey version in the Unica Platform registration:

1. Export the version configuration using the following command on clean 26.1.0 environment:

```
./configTool.sh -x -p "Affinium|Journey|about" -f "Journey_about.xml"
```

2. Edit the `Journey_about.xml` file generated by the above command. Change the version to `26.1.0.0.0.GA_BUILD".<GA_BUILD>`. Replace this with build number referring to `version.txt` from installation location.

```
<property id="xxxxxx" name="releaseNumber" type="string_property" width="40">
<value>26.1.0.0.0.GA_BUILD</value>
</property>
```

3. Import the earlier mentioned edited file using the following command:

```
./configTool.sh -v -i -o -p "Affinium|Journey" -f "Journey_about.xml"
```

4. Once the Journey Web application is up and running, access the About page to check the Journey build version.

Post Upgrade Steps

1. On the target setup, navigate to the Journey node `Affinium|Journey|navigation` and update the new setup navigation URL:

- **serverURL**
- **serverURLInternal**

2. Change the Platform client ID and Platform client Secret in the `application.properties` of Web and Engine.

```
cd <Platform_Installation_Location>/tools/bin
./clientDetails.sh -a Journey
```

OUTPUT

```
ClientID: 495524
ClientSecret: BcjdPwQwfzPiY8M
AppName: Journey
ClientSecret and ClientId generated successfully!!
```

3. Start the application server to start Journey Web and verify if you can navigate to all Journey menu items, and if you can create Journeys and perform operations on Journeys.
4. To start the engine, encrypt the database password by running the utility and update the encrypted passwords in Journey Engine `application.properties` file

```
cd <Journey_Installation_Location>/tools
./JourneyEncryptionUtility.sh <Journeys_SystemDB>
./JourneyEncryptionUtility.sh <Journeys_ReportDB>
```

5. Before starting the Journey Engine, complete the following steps:

- a. Navigate to the `<Ignite_Home>/work/db` directory. Verify if there are multiple folders in the system. If there are multiple folders, choose the latest one.
- b. Confirm if any folder like `nodexx-xxxx-xxxx-xxxx-xxxx-xxxxxxx` exists.
- c. Also confirm if there are multiple folders in the system. If there are multiple folders, choose the latest one.
- d. Copy the name of the folder.
- e. Open `application.properties` file of Journey Engine and add the following properties:

```
journey.data.migration.required= true
ignite.upgrade.node= <the name of the node folder which is copied from ignite work/db directory>
```

- f. Run the Journey Engine JAR again. In this run, the JAR will work as a migration utility.
- g. Verify the logs for errors. Ideally, there will not be any errors.

- h. Wait for the utility to complete running.
 - i. If the utility executes without error, remove the entry `journey.data.migration.required` from the `application.properties` file.
6. Start the Journey Engine. The Journey Engine should started successfully.
 7. Verify that the old migrated Journey is processing the data.
 8. Verify that the newly created Journeys are processing data.

Procedure: Fast upgrade Unica Centralized Offer Management

To perform the fast upgrade of Unica Centralized Offer Management from version 12.0.0.0 and 12.0.1.0 to 12.1.0.0, perform the following steps.

Before you begin

Ensure that you complete the fast upgrade steps for Platform and Campaign before the Centralized Offer Management fast upgrade.

If you are planning to perform a fast upgrade and add new products like Unica Journey, Unica Centralized Offer Management, Unica Content Integration framework, Unica Insights, and Unica Deliver, to your existing Unica installation, you should first perform the fast upgrade of existing products. After upgrading the base version to 12.1.1, perform a clean installation of the new products.

About this task

1. 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 DLLs / SOS / EXEs, 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`.

2. If you have made the changes in the logging configuration, merge those changes over the new installation. Typically, it is located at - `<CentralizedOffer_Installation_path>/conf/logging`.
3. If required, copy your previously generated log files to the new file system. Typically, it is located at - `<CentralizedOffer_Installation_path>/logs`.
4. Navigate to `<Platform_Installation_path>/tools/bin` and execute below commands.
 - `DBResourceBundle.bat(/sh) -P Offer -F <CentralizedOffer_Installation_path>/resourcebundles/com/unica/manager/configuration`
 - `configTool.bat(/sh) -d -p "Affinium|Offer|logging" -o`
 - `configTool.bat(/sh) -up -p "upgrade COM"`
5. Make sure that the target environment has the navigation urls and internal urls correctly pointing to the target environment.

Procedure: Fast upgrade Unica Content Integration

To perform the fast upgrade of Unica Content Integration to 26.1.0, perform the following steps.

About this task

1. Complete the fast upgrade procedure for Unica Platform and ensure that database is migrated to the new installation environment. This includes required admin configurations and user roles for Unica Content Integration.
2. Customize the logging configurations as per the requirements or as per the existing setup in the following listed files.

- `{PLATFORM_HOME}/AssetPicker/conf/logging/log4j.xml`
- `{PLATFORM_HOME}/AssetPicker/conf/logging/log4j2.xml`

If required, move all the logs from previous installation to the new installation location from below mentioned directory `{PLATFORM_HOME}/AssetPicker/logs`.

3. If any custom plugins were deployed for Content Integration in existing installation, follow the instructions given below to deploy those on new installation.
 - a. Copy all custom plugin jars under `{PLATFORM_HOME}/AssetPicker/plugins/custom` directory.
 - b. Edit the `{PLATFORM_HOME}/AssetPicker/conf/plugin-services.yml` file and add service declarations for all the custom plugins copied under aforementioned directory. Service declarations for existing custom plugins can be found inside `META-INF/*-content-services.yml` files within respective plugin jars.



Note: Ensure that you only append the individual service declarations without top level “services” element.

- c. If any customization was made to the out of the box supported CMS plugin, ensure that you delete the corresponding default jar from `{PLATFORM_HOME}/AssetPicker/plugins/out-of-the-box` directory to avoid potential runtime conflicts.



Note: Any customization in `{PLATFORM_HOME}/AssetPicker/conf/i18n/*.properties` files will no longer be supported from 26.1.0 onwards. Hence, this directory will not be present this release onwards.

4. Execute the following commands

- On Windows:
 - `{PLATFORM_HOME}/tools/bin/DBResourceBundle.bat -P ContentIntegration -F {PLATFORM_HOME}/AssetPicker/resourcebundles/com/unica/manager/configuration`
- On Unix:
 - `{PLATFORM_HOME}/tools/bin/DBResourceBundle.sh -P ContentIntegration -F {PLATFORM_HOME}/AssetPicker/resourcebundles/com/unica/manager/configuration`

Procedure: Fast upgrade Unica Collaborate

Before you begin

Complete the prerequisites to upgrade from Unica Collaborate 10.x or higher version to Unica Collaborate version 12.1.7.

1. Ensure that Unica Platform and Unica Campaign are upgraded successfully on the target setup. Install Collaborate version 12.1.7 on the setup.
2. Take a backup for Collaborate source system databases.

Upgrading Collaborate database

1. Import the source system database on the target system database for Collaborate version 12.1.7.
2. Run the `udmdbsetup` utility on target system from `COLLABORATE_HOME/tools/bin.\`
3. Create data sources on the target application server and point to the upgraded database schema. You can use the same JNDI names as those in the source system to save effort in doing manual changes.

Updating files from source to target environment

1. Take a backup of the source and the destination system files under the following directories.
 - `<COLLABORATE_HOME>/projectattachments`
 - `<COLLABORATE_HOME>/templates`
 - `<COLLABORATE_HOME>/taskattachments`
 - `<COLLABORATE_HOME>/attachments`
2. Copy or merge all files mentioned in the previous step from the source folders to the respective destination Collaborate directories.
3. In the source version, if you have customized the following files, copy these files to `COLLABORATE_HOME/conf` directory in the destination environment.
 - `listmanager_tables.xml`
 - `collaborate_log4j.xml`
 - `listmanager_list.xml`
 - `listmanager_searchScreens.xml`



Note: You can ignore this step if you have not made any changes to the mentioned files.

Collaborate Configuration changes

About this task

1. Execute the following query on Platform database to update the name of the Distributed Marketing node to Collaborate in Platform configurations.

```
UPDATE usm_configuration SET display_name='Collaborate' where internal_name='Collaborate' and
display_name_key='Distributed Marketing';
```

2. Execute the following commands.

- `configTool.bat -vp -p "Affinium|Collaborate" -f "Collaborate_Home/conf/updates/collaborate_conf_upgrade_maxLimit.xml"`
- `configTool.bat -vp -p "Affinium|Collaborate" -f "Collaborate_Home/conf/updates/collaborate_conf_upgrade_insights.xml"`

3. Create a xml file name. For example: `validateFileUpload.xml` with following contents.

```
<!-- configTool.bat -vp -p "Affinium|Collaborate|UDM Configuration Settings" -f
collaborate_conf_upgrade_insights.xml -->
<category name="Attachment">
  <property name="validateFileUpload" type="radio">
    <value predefined="true" selected="false">true</value>
    <value predefined="true" selected="true">>false</value>
  </property>
</category>
```

4. Execute the following command.

```
configTool.bat -vp -p "Affinium|Collaborate" -f "<path_to_validateFileUpload.xml>"
```

5. Perform the following substep to import resource bundles in Unica Platform. Execute the following scripts.

- Navigate to `<platform_home>/tools/bin` and execute

```
DBResourceBundle.sh -P Collaborate -F Collaborate_Home/conf/resourcebundles
```

6. Update `serverURL` in `Affinium|Collaborate|navigation`.
7. Update `flowchartServiceCampaignServicesURL` in `Affinium|Collaborate|UDM Configuration Settings|Flowchart`.
8. Update `flowchartServiceNotificationServiceURL` in `Affinium|Collaborate|UDM Configuration Settings|Flowchart`.
9. Update `notifyCollaborateBaseURL` in `Affinium|Collaborate|UDM Configuration Settings|Notifications`.

Collaborate version registration

1. On target environment navigate to the `PLATFORM_HOME/tools/bin` and execute the following command.

```
configTool.sh -x -p "Affinium|Collaborate|about" -f Collaborate_about.xml
```

2. Make the following changes to the `Collaborate_about.xml` file and save it as `collab_about_new.xml` file.
 - a. Replace "display name" value "IBM Unica Distributed Marketing" with "Unica Collaborate"
 - b. Replace "releaseNumber" value "<Old version>" with "12.1.2.0<Build number as per version.txt>".
 - c. Replace "java" value "IBM Corporation 2.4" with "Oracle Corporation 25.162-b12".
3. Execute the following command on the target version 12.1.2 environment.

```
configTool.sh -v -i -o -p "Affinium|Collaborate" -f Collaborate_about.xml
```

4. Restart the Unica Collaborate application server.



Note: Collaborate 26.1.0 is not supported, if user is on any version before 12.1.7. Follow the below upgrade path for Platform, Campaign and Collaborate:



12.1.x to 12.1.7

Then Upgrade only Platform and Campaign as 12.1.7 → 12.1.10 → 26.1.0. Collaborate will remain on 12.1.7.

Procedure: Fast upgrade Unica Contact Central

About this task

Prerequisites - Contact Central application must be up and running on the target setup, with no data created. Contact Central database name should be the same on both base and target setups.

Upgrade Steps

1. Stop Services (Base Setup)

Stop Contact Central services on the base setup.

2. Backup Database (Base Setup)

Take a full backup of the Contact Central database from the base setup.

3. Stop Services (Target Setup)

Stop Contact Central services on the target setup.

4. Backup & Drop Target Database

- Take backup of Contact Central database on the target setup.
- Drop the Contact Central DB from the target setup.

Fast upgrade mainly involves:

- Upgrading the Contact Central database manually on the target setup.
- Upgrading the Contact Central configuration on the target setup.

5. Perform Version-Specific Upgrade Steps

If Base Version = 12.1.2

- Database Scripts to Run on respective databases type:
 - `<Contact_Central_Install_Location>\ddl\upgrade1212to1213`
 - `<Contact_Central_Install_Location>\ddl\upgrade1217to1218`
- Configuration Scripts to Run:
 - `<Contact_Central_Install_Location>\conf`
`\upgrade1213to1214\ContactCentral_Navigation.xml`
 - `<Contact_Central_Install_Location>\conf`
`\upgrade1218to1219\ContactCentral_API_V2.xml`

If Base Version = 12.1.3

- Database Scripts to Run on respective databases type:
 - `<Contact_Central_Install_Location>\ddl\upgrade1217to1218`

- Configuration Scripts to Run:
 - <Contact_Central_Install_Location>\conf
 \upgrade1213to1214\ContactCentral_Navigation.xml
 - <Contact_Central_Install_Location>\conf
 \upgrade1218to1219\ContactCentral_API_V2.xml

If Base Version = 12.1.4 to 12.1.7

- Database Scripts to Run on respective databases type:
 - <Contact_Central_Install_Location>\ddl\upgrade1217to1218
- Configuration Scripts to Run:
 - <Contact_Central_Install_Location>\conf
 \upgrade1218to1219\ContactCentral_API_V2.xml

If Base Version = 12.1.8

- Database Scripts to Run on respective databases type:
 - Not Required
- Configuration Scripts to Run:
 - <Contact_Central_Install_Location>\conf
 \upgrade1218to1219\ContactCentral_API_V2.xml

If Base Version = 12.1.9

- Database Scripts to Run on respective databases type:
 - Not Required
- Configuration Scripts to Run:
 - Not Required

If Base Version = 12.1.10

- Database Scripts to Run on respective databases type:
 - Not Required
- Configuration Scripts to Run:
 - Not Required

6. Delete Temporary Files

Delete the temp folder in the application server.

7. Update Navigation URL

Update the Contact Central navigation URL as per the target setup.

8. Start Services (Target Setup)

Start Contact Central services on the target setup.

9. Final Validation

Ensure that all contents and configurations from the base setup are:

- Successfully migrated
- Verify `ContactCentralAdmin` role is assigned to the user – **asm_admin** → **Edit roles**.

If **ContactCentralAdmin** role is not available, run the following query on associate Platform database:

```
select * from usm_role where application=123
```

If the query does not yield any results, complete the following steps:

- a. Navigate to `<Platform_installation_location>\tools\bin`.
- b. To populate Contact Central specific roles and permission, execute the following command:

```
populateDb.bat -n ContactCentral -l HIGH
```

This command will add the `ContactCentralAdmin` user role.

Verify if **ContactCentral** main menu is available. If not, run the following configuration Please populate roles for user as suggested in previous comments.

- a. Import Contact Central navigation from the path `<ContactCentral_installation_location>\conf\upgrade1213to1214\ContactCentral_Navigation.xml`
- b. Revalidate if Contact Central is properly configured and fully functional on the target setup.

Procedure: Fast upgrade Unica Audience Central, Unica Segment Central

To perform the fast upgrade of Unica Audience Central / Unica Segment Central from version 12.1.4 onwards, perform the following steps:

Before you begin

Ensure that you complete the fast upgrade steps for Platform and Campaign before fast upgrading Audience Central and Segment Central.

1. If you have made the changes in the logging configuration, merge the changes over the new installation. Usually, the configurations are available in the following location:
 - For Audience Central → `<AudienceCentral_Installation_path>/conf/logging`
 - For Segment Central → `<SegmentCentral_Installation_path>/conf/logging`
2. If required, copy your previously generated log files to the new file system. Usually, the generated log files are available in the following location:
 - For Audience Central → `<AudienceCentral_Installation_path>/logs`
 - For Segment Central → `<SegmentCentral_Installation_path>/logs`
3. Ensure that the target environment has the navigation URLs and internal URLs correctly pointing to the target environment.
4. On the target setup ensure that the datasource is created in the appserver for UserDB using the same name used for configurations under Campaign datasources.
5. Copy the uploaded files in specific partitions from AudienceCentral home.
6. Copy the Suggestions files created from base setup from the following path: `/Platform/ML/segment-suggestions/<partition>`

Procedure: Fast upgrade Unica Insights Reports

About this task

The following link provides information about upgrading Unica Insights Reports from existing version to the latest version:

https://help.hcl-software.com/unica/CommonGuides/en/26.1.0/Platform/BIRT/Upgrade_reports.html

Unica Campaign and Deliver Reports Fast Upgrade

To perform the fast upgrade of Unica Campaign reports, complete the following steps.

1. Copy the following report design files folders from Campaign installation directory to <PLATFORM_HOME>/ Insights/Reports root folder.
File names have <ora/db2/sqlsvr/mariadb_*.rptdesign to identify the db type.

RPT design files	Platform target folders
/Campaign/reports/Affinium Campaign/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign/
/Campaign/reports/Affinium Campaign/Performance Reports/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign//Performance Reports/
/Campaign/reports/Affinium Campaign/Performance Reports/Campaign Offer Performance Over Time/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign/Performance Reports/Campaign Offer Performance Over Time/
/Campaign/reports/Affinium Campaign/Performance Reports/Offer Performance Over Time/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign//Performance Reports/Offer Performance Over Time/
/Campaign/reports/Affinium Campaign - Object Specific Reports/campaign/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign - Object Specific Reports/campaign/
/Campaign/reports/Affinium Campaign - Object Specific Reports/offer/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN /Affinium Campaign - Object Specific Reports/offer/
/Campaign/reports/Affinium Campaign/Deliver Reports/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN / Affinium Campaign/Deliver Reports/

RPT design files	Platform target folders
/Campaign/reports/Unica Dashboards/Campaign/	<PLATFORM_HOME>/Insights/Reports/Unica-Dashboard/Campaign/partitions/partitionN/
/Campaign/reports/Unica Dashboards/Deliver/	<PLATFORM_HOME>/Insights/Reports/Unica Dashboard/Deliver/partitions/partitionN/

2. Register Campaign/reports/schema/Deliver_performance.xml using Campaign /reports /tools / import_all.bat/sh.
3. For Campaign, run /Campaign/reports/schema/templates_sql_load.sql against Platform database.
4. For Deliver, run the following scripts against Campaign database.
 - /Campaign/reports/tools/uare_lookup_create_Oracle/MSSQL/DB2.sql
 - /Campaign/reports/tools/uare_lookup_populate*.sql (for all locales)
 - /Campaign/reports/Deliver-ddl/<DBType>/acer_tables_db2/ora/sqlserver.sql
 - /Campaign/reports/Deliver-ddl/<DBType>/acer_indexes_db2/ora/sqlserver.sql
 - /Campaign/reports/Deliver-ddl/<DBType>/acer_scripts_db2/ora/sqlserver.sql
5. For Deliver reports, the database details need to be configured using Insights DB utility. The following are the steps.
 - a. After installation of products is completed, open command prompt and navigate to <PLATFORM_HOME>/ Insights/tools/bin
 - b. At this location, the reports utility is present.

Execute the below command

```
insightsDBUtil.bat -ds=DeliverDS -bPath=<CAMPAIGN_HOME>/reports -DBType=<DB_TYPE> -URL=<JDBC_URL>
-user=<user> -pwd=<password>
```

- c. Then perform the same steps like Campaign reports to place the reports under <INSIGHTS_HOME>/ Reports. For more details, see the Insights Reports Installation and Configuration Guide.
6. Navigate to **Configuration > Report SQL Generator**, and create views or materialized views as per the database type. For more information, see the Unica Insights Reports Installation and Configuration guide.

Unica Interact Reports Fast Upgrade

To perform the fast upgrade of Unica Interact reports, complete the following steps.

Copy the following report design files folders from Interact installation directory to <PLATFORM_HOME>/Insights/ Reports root folder.

File names have <ora/db2/sqlsvr_*.rptdesign to identify the db type.

RPT design files	Platform target folders
/<INTERACT_HOME>/reports/Unica Interact/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN/Unica Interact/

RPT design files	Platform target folders
/<INTERACT_HOME>/reports/Unica Interact/Interactive Entity Reports	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN/Unica Interact/Interactive Entity Reports
/<INTERACT_HOME>/reports/Unica Interact - Object Specific Reports/	<PLATFORM_HOME>/Insights/ Reports/campaign/partitions/partitionN/Unica Interact - Object Specific Reports/
/<INTERACT_HOME>/reports/Unica Dashboards/interact/	<PLATFORM_HOME>/Insights/Reports/Unica Dashboard/Interact/partitions/partitionN

Unica Plan Reports Fast Upgrade

To perform the fast upgrade of Unica Plan reports, complete the following steps.

- Copy the following report design files folders from Plan installation directory to <PLATFORM_HOME>/Insights/ Reports root folder.
File names have <ora/db2/sqlsvr_*.rptdesign to identify the db type.
- Navigate to `Affinium|Plan|umoConfiguration|reports` and change the following properties. For example:

reportsAnalysisSectionHome	Plan/Affinium Plan
reportsAnalysisTabHome	Plan/Affinium Plan - Object Specific Report



Note: You must not include a slash (/) in the beginning of the path of these properties.

RPT design files	Platform target folders
/Plan/reports/Insights_Reports/Affinium Plan/	<PLATFORM_HOME>/Insights/ Reports/Plan/Affinium Plan/
/Plan/reports/Insights_Reports/Affinium Plan - Object Specific Reports/	<PLATFORM_HOME>/Insights/Reports/Plan/Affinium Plan - Object Specific Reports/
/Plan/reports/Insights_Reports/Affinium Plan - Object Specific Reports/plan	<PLATFORM_HOME>/Insights/Reports/Plan /Affinium Plan - Object Specific Reports/plan
/Plan/reports/Insights_Reports/Affinium Plan - Object Specific Reports/program	<PLATFORM_HOME>/Insights/Reports/Plan/Affinium Plan - Object Specific Reports/program
/Plan/reports/Insights_Reports/Affinium Plan - Object Specific Reports/project	<PLATFORM_HOME>/Insights/Reports/Plan/Affinium Plan - Object Specific Reports/project

RPT design files	Platform target folders
/Plan/reports/Insights_Reports/Affinium Plan - Object Specific Reports/team	<PLATFORM_HOME>/Insights/Reports/Plan/Affinium Plan - Object Specific Reports/team
/Plan/reports/Insights_Reports/Unica Dashboards/plan/	<PLATFORM_HOME>/Insights/Reports/Unica Dashboard/Plan

Procedure: Fast upgrade Cognos Reports

Unica Campaign Report Fast Upgrade

The following steps provide you a high level overview of Cognos Reports Upgrade process:

Users are required to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with HCL Unica v12.1.1.

Fast upgrade process does not take care of upgrading any customization done in the HCL Unica system tables, users will need to take care of upgrading / validating the customization after upgrade.

Upgrade Steps for Reports when no customization done in Unica Campaign Reports:

Users are required to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide. High level steps involved in the report Installation are as follows.

Upgrade Steps for Reports when customization is done in Unica Campaign Reports:

Cognos model can be upgraded by sequential execution of model upgrade scripts from "<ReportsPackCampaign>/cognos11/CampaignModel" directory. Run the following scripts:

Campaign Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
10.1.x	No Change in Campaign Reports Model
11.0.0	No Change in Campaign Reports Model
12.0.0	No Change in Campaign Reports Model
12.1.0	No Change in Campaign Reports Model
12.1.1	No Change in Campaign Reports Model

Unica Deliver Reports Fast Upgrade

About this task

You are required to configure Cognos reports for Deliver introduced with Unica V12.1.1. To configure Deliver reports, see the *Table 3 "Roadmap for installing the Unica integration components and report models on the Cognos system"* in *Cognos Reports Installation and Configuration Guide* and follow the required steps.

Unica Plan Reports Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with Unica v12.1.1.

Upgrade Steps for Reports when no customization done in Unica Plan Reports:

User will need to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup
2. Import Unica Reports for plan.zip file from v12.1.1 (<ReportsPackPlan>\cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1.1 using IBM Cognos framework manager.
4. Use the newly published model while configuring reports with the server.

Upgrade Steps for Reports when customization is done in Plan Reports:

1. Backup customize reports from old IBM Cognos BI server
2. Import Unica Reports for plan.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "< ReportsPackPlan >/cognos11/PlanModel" directory. Run the following scripts:

Unica Plan Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
10.1.x	No Change in Unica Plan Reports Model
11.0.0	No Change in Unica Plan Reports Model
12.0.0	No Change in Unica Plan Reports Model
12.1.0	No Change in Unica Plan Reports Model
12.1.1	No Change in Unica Plan Reports Model

Unica Plan and Campaign Reports Fast Upgrade

User will need to follow the regular reports upgrade steps referring to HCL Unica Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup
2. Import Unica Reports for Unica Plan and Campaign.zip file from v12.1.1. (<ReportsPackCampaignPlan> \cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1.1 using IBM Cognos framework manager.
4. Use the newly published model while configuring reports with the server.

Upgrade Steps for Reports when customization is done in Unica Plan Reports:

1. Backup customize reports from old IBM Cognos BI server.
2. Import Unica Reports for plan and Campaign.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "<ReportsPackCampaignPlan>/cognos11/PlanModel" directory. Run the following scripts:

Unica Plan Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
10.1.x	No Change in Plan Campaign Reports Model
11.0.0	No Change in Plan Campaign Reports Model
12.0.0	No Change in Plan Campaign Reports Model
12.1.0	No Change in Plan Campaign Reports Model
12.1.1	No Change in Plan Campaign Reports Model

Unica Interact Reports Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with Unica v12.1.

Upgrade Steps for Reports when no customization done in Interact Reports:

User will need to follow the regular reports upgrade steps referring to Cognos Reports Installation and Configuration Guide.

High level steps involved in the report Installation are as follows.

1. Please take a backup of model in base setup
2. Import Unica Reports for Interact.zip file from v12.1.1 (<ReportsPackInteract>\cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v12.1.1 using IBM Cognos framework manager,
4. Use the newly published model while configuring reports with the server.

Upgrade Steps for Reports when customization is done in Interact Reports:

1. Backup customize reports from old IBM Cognos BI server.
2. Import Unica Reports for Interact.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

Cognos model can be upgraded by sequential execution of model upgrade scripts from "< ReportsPackInteract >/cognos11/InteractModel" directory. Run the following scripts:

Unica Interact Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
10.1.x	No Change in Interact Reports Model
11.1	No Change in Interact Reports Model
12.0	No Change in Interact Reports Model
12.1	No Change in Interact Reports Model
12.1.1	No Change in Interact Reports Model

Installing Additional Unica Products on 26.1.0

For installing Unica products that were not part of the base setup, follow these steps:

- Perform a **fast upgrade** of the desired products.
- After the fast upgrade, you can perform a **clean installation** of new Unica products (like Unica Centralized Offer Management, Unica Journey, Unica Link, Unica Contact Central, Unica Audience Central, and Unica Segment Central) .
- Please refer to the respective product installation guides for detailed instructions.

Example: To install Journey, follow the **Unica Journey Installation Guide for 26.1.0** available on doc.unica.com.

Troubleshooting

- SQL :Error: Caused by: com.microsoft.sqlserver.jdbc.SQLServerException: Cannot insert duplicate key row in object 'dbo.USM_CONFIGURATION' with unique index 'IX_USM_CONFIGURATION'. The duplicate key value is (<NULL>, Affinium).

1.Drop the Index of USM_CONFIGURATION

```
DROP INDEX [USM_CONFIGURATION].[IX_USM_CONFIGURATION];
```

```
DROP INDEX [USM_CONFIGURATION].[IX1_USM_CONFIGURATION];
```

OR

```
DROP INDEX IX_USM_CONFIGURATION;
```

```
DROP INDEX IX1_USM_CONFIGURATION;
```

```
DROP INDEX IX2_USM_CONFIGURATION;
```

2. Create the Index for USM_CONFIGURATION

```
CREATE UNIQUE INDEX IX_USM_CONFIGURATION ON
```

```
USM_CONFIGURATION (PARENT_ID asc, INTERNAL_NAME asc);
```

```
CREATE UNIQUE INDEX IX1_USM_CONFIGURATION ON
```

```
USM_CONFIGURATION (NS_THREAD asc, NS_LEFT asc);
```

```
CREATE UNIQUE INDEX IX2_USM_CONFIGURATION ON
```

```
USM_CONFIGURATION (NS_THREAD asc, NS_RIGHT asc);
```

- DB2 – Constraint violation errors: DB2 data migration from old base environment to 11.1 (clean environment) should be done with help of DBA. Before proceeding with upgrade steps y should ensure that all the database tables, constraints, indexes etc. are migrated successfully. For DB2 system tables import in clean 11.1 will cause issues with AUTO ID increment on certain tables. Due to these errors there will be related to constraint violation error.

This step should be executed only if the "Upgrading the Platform configuration" step fails with errors related to constraint violation error:

```
SELECT MAX(ID)+ 1 FROM USM_CONFIGURATION;
```

```
ALTER TABLE USM_CONFIGURATION ALTER COLUMN ID RESTART WITH NNNN; --here put the result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_ROLE;
```

```
ALTER TABLE USM_ROLE ALTER COLUMN ID RESTART WITH NNNN; -- here put the result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_DB_RESOURCE_BUNDLE;
```

```
ALTER TABLE USM_DB_RESOURCE_BUNDLE ALTER COLUMN ID RESTART WITH NNNN; --here put the result for the  
above query
```

```
SELECT MAX(ID)+ 1 FROM USM_AUDIT;
```

```
ALTER TABLE USM_AUDIT ALTER COLUMN ID RESTART WITH NNNN; -- here put the result for the above query
```

```
SELECT MAX(ID)+ 1 FROM USM_ALERT;
```

```
ALTER TABLE USM_ALERT ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_ALERT_SUBSCRIPTION;
```

```
ALTER TABLE USM_ALERT_SUBSCRIPTION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_NOTICE;
```

```
ALTER TABLE USM_NOTICE ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASHBOARD;
```

```
ALTER TABLE USM_DASHBOARD ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASHBOARD_PORTLET;
```

```
ALTER TABLE USM_DASHBOARD_PORTLET ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_IFRAME_DET;
```

```
ALTER TABLE USM_DASH_PORT_IFRAME_DET ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_PREF_MAP;
```

```
ALTER TABLE USM_DASH_PORT_PREF_MAP ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_DASH_MANAGE_RIGHTS;
```

```
ALTER TABLE USM_DASH_MANAGE_RIGHTS ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_PORT_QUICKLINK_PREF;
```

```
ALTER TABLE USM_PORT_QUICKLINK_PREF ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_PERSONALIZATION;
```

```
ALTER TABLE USM_PERSONALIZATION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_OBJECT_TYPE;
```

```
ALTER TABLE USM_OBJECT_TYPE ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USM_OBJECT_ATTR;
```

```
ALTER TABLE USM_OBJECT_ATTR ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USCH_TASK_NOTIFICATION;
```

```
ALTER TABLE USCH_TASK_NOTIFICATION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 FROM USCH_RUN_NOTIFICATION;
```

```
ALTER TABLE USCH_RUN_NOTIFICATION ALTER COLUMN ID RESTART WITH NNNN;
```

```
SELECT MAX(TASKID)+ 1 FROM USCH_TASK;
```

```
ALTER TABLE USCH_TASK ALTER COLUMN TASKID RESTART WITH NNNN;
```

```
SELECT MAX(RUNID)+ 1 FROM USCH_RUN;
```

```
ALTER TABLE USCH_RUN ALTER COLUMN RUNID RESTART WITH NNNN;
```

```
SELECT MAX(RUNEXCLUSIONID)+ 1 FROM USCH_RUN_EXCLUSION;
```

```
ALTER TABLE USCH_RUN_EXCLUSION ALTER COLUMN RUNEXCLUSIONID RESTART WITH NNNN;
```

```
SELECT MAX(ID)+ 1 from USM_ALERT_TYPE;
```

```
ALTER TABLE USM_ALERT_TYPE ALTER COLUMN ID RESTART WITH NNNN
```

You must execute the 'commit;' statement after the tables are altered.

- DB2 – In case your DBA observed Unica Platform system tables constraints are not imported in the 11.1 system database, then you can execute following query: It will create missing constraints. For constraints that are already present, it shows errors that can be ignored.

Execute the script file: <PLATFORM_HOME> /db/ ManagerSchema_DB2_CreateFKConstraints.sql

- If the temp table is ON in the source DB, it can create to Temp table related issues in the target setup.

- The user DB used in Target setup should be the same as the source. If a different User DataSource is used, then the existing flowcharts will not get executed due to table mappings differences.
- Oracle export database schema using "exp" utility does not export tables with no rows. Note: Before executing these scripts, review them with your DBA, this approach is used by engineering, you can take the appropriate approach as suggested by your DBAs. In this case, you can execute the scripts underneath to enable the export of tables with no records. `SELECT 'ALTER TABLE '||table_name||' ALLOCATE EXTENT;' FROM user_tables WHERE segment_created = 'NO';` This script will provide SQL scripts as output that should be executed in the schema that needs to be exported.
- Oracle – Constraint violation errors: Oracle data migration from old base environment to 11.1 (clean environment) must be done with help of a DBA. Before proceeding with upgrade steps please ensure that all the database tables, constraints, indexes and so on are migrated successfully. In Oracle the following error is displayed:

```
ORA-00001: unique constraint (UNICA_PLATFORM.SYS_C0038815) violated insert into USM_CONFIGURATION_VALUES
(VERSION, PREDEFINED, SELECTED, STRING_VALUE, NUMERIC_VALUE, DATE_VALUE, CONFIGURATION_ID,
CONFIGURATION_ORDER, ENVIRONMENT_ID, USER_ID) values (" , " , " , " , " , " , " , " , " , " )
```

The following steps should be executed only if the "Upgrading the Unica Platform configuration" step fails with errors related to constraint violation error:

1. Create a backup of the USM_CONFIGURATION and USM_CONFIGURATION_VALUES tables.
2. Create a 'full export' of the configuration: `./configTool.sh/bat -x -f full_export.xml`
3. Truncate the USM_CONFIGURATION_VALUES table: `truncate table usm_configuration_values; commit;`
4. Delete from USM_CONFIGURATION table: `delete from usm_configuration; commit;`
5. Import the "full_export.xml" file: `./configTool.sh/bat -i -p "Affinium" -f full_export.xml`
6. Reattempt the failing command.