Version 11 Release 0.1
31 August, 2018

IBM Marketing Platform Upgrade Guide

Note
Before using this information and the product it supports, read the information in "Notices" on page 91.

This edition applies to version 11, release 0, modification 1 of IBM Marketing Platform and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Upgrade overview

An upgrade of Marketing Platform is complete when you upgrade, configure, and deploy Marketing Platform. The Marketing Platform Upgrade Guide provides detailed information about upgrading, configuring, and deploying Marketing Platform.

Use the *Upgrade roadmap* section to obtain a broad understanding about using the Marketing Platform Upgrade Guide.

Upgrade roadmap

Use the upgrade roadmap to quickly find the information that you need for installing Marketing Platform.

You can use the following table to scan the tasks that must be completed for installing Marketing Platform

Table 1. Marketing Platform upgrade roadmap

Topic	Information
Chapter 1, "Upgrade overview"	This topic provides the following information: • "How the installers work" on page 3 • "Modes of installation" on page 3 • "Marketing Platform documentation and help" on page 4
Chapter 2, "Planning the Marketing Platform upgrade," on page 7	This topic provides the following information: • "Prerequisites" on page 7 • "Marketing Platform installation worksheet" on page 9 • "Upgrade prerequisites for all IBM Marketing Software products" on page 10 • "Time zone support for scheduler" on page 11 • "Backing up the corporatetheme.css file and branding images" on page 12 • "Marketing Platform upgrade scenarios" on page 13
Chapter 3, "Upgrading from version 10.0 and above with automatic migration," on page 17	Read more about how to upgrade Marketing Platform from version 10.0 and above with automatic migration. **Important:** If you are upgrading from a version prior to 10.0, you must first upgrade to version 10.0 and then upgrade to version 10.1. For information about upgrading to version 10.0, see the IBM Marketing Platform 10.0 Upgrade Guide.

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Table 1. Marketing Platform upgrade roadmap (continued)

Topic	Information
Chapter 4, "Upgrading from version 8.6.0 with manual migration," on page 19 Chapter 5, "Upgrading from version 9.0 with manual migration," on page 27 Chapter 6, "Upgrading from version 9.1.0 with manual migration," on page 35 Chapter 7, "Upgrading from version 9.1.1 with manual migration," on page 41 Chapter 8, "Upgrading from version 9.1.2 with manual migration," on page 45 Chapter 9, "Upgrading from version 10.0.0 with manual migration," on page 49Chapter 10, "Upgrading from version 10.1.0 with manual migration," on page 53Chapter 11, "Upgrading from version 11.0.0 with manual migration," on page 57	Read more about how to upgrade Marketing Platform from version 8.6.0 and above with manual migration. Use the instructions in the chapter that corresponds with your current version.
Chapter 12, "Deploying Marketing Platform," on page 61	This topic provides the following information: • "Guidelines for deploying Marketing Platform on WebLogic" on page 61 • "Guidelines for deploying Marketing Platform on WebSphere" on page 62 • "Verifying your Marketing Platform installation" on page 63
Chapter 13, "Configuring Marketing Platform after deployment," on page 65	This topic provides the following information: • "Default password settings" on page 65
Chapter 14, "Marketing Platform utilities," on page 67	This topic provides the following information: • "Setting up Marketing Platform utilities on additional machines" on page 69 • "alertConfigTool" on page 69 • "configTool" on page 70 • "datafilteringScriptTool" on page 74 • "encryptPasswords" on page 75 • "partitionTool" on page 76 • "populateDb" on page 78 • "restoreAccess" on page 79 • "scheduler_console_client" on page 80
Chapter 15, "Marketing Platform SQL scripts," on page 83	This topic provides the following information: • "ManagerSchema_DeleteAll.sql" on page 83 • "ManagerSchema_PurgeDataFiltering.sql" on page 83 • "SQL scripts for creating system tables" on page 84 • "ManagerSchema_DropAll.sql" on page 85.
Chapter 16, "Uninstalling Marketing Platform," on page 87	This topic provides information about how to uninstall Marketing Platform.

How the installers work

Use the IBM® Marketing Software installer with the Marketing Platform installer when you install Marketing Platform.

The IBM Marketing Software suite installer starts the individual product installers during the installation process.

Use the following guidelines to install Marketing Platform.

- Make sure that the IBM Marketing Software installer and the Marketing Platform installer are in the same directory on the server where you want to install Marketing Platform. When multiple versions of the Marketing Platform installer are present in the directory with the IBM Marketing Software installer, the IBM Marketing Software installer shows the latest version of Marketing Platform on the IBM Marketing Software Products screen in the installation wizard.
- If you are planning to install a patch immediately after you install Marketing Platform, make sure that the patch installer is in the same directory as that of the IBM Marketing Software and the Marketing Platform installer.

IBM Marketing Software is installed in one of the following directories by default:

- `/opt/IBM/IMS` (for UNIX)
- `C:\IBM\IMS` (for Windows)

IBM Marketing Software products are installed by default in a subdirectory of the *IBM_Marketing_Software_home* directory. For example, Marketing Platform is installed in the *IBM_Marketing_Software_home*`/Platform` directory.

However, you can change the directories during installation.

Modes of installation

The IBM Marketing Software suite installer can run in one of the following modes: GUI mode, console mode, or silent mode (also called the unattended mode). Select a mode that suits your requirements when you install Marketing Platform.

For upgrades, you use the installer to perform many of the same tasks that you perform during the initial installation.

GUI mode

Use the GUI mode for Windows or the X Window System mode for UNIX to install Marketing Platform by using the graphical user interface.

Console mode

Use the console mode to install Marketing Platform by using the command line window.

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

Silent mode

Use the silent or unattended mode to install Marketing Platform multiple times. The silent mode uses response files for installation, and does not require user input during the installation process.

Note: Silent mode is not supported for upgrade installations in clustered web application or clustered listener environments.

Sample response files

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

The following table provides information about sample response files:

Table 2. Description of sample response files

Sample response file	Description
`installer.properties`	The sample response file for the IBM Marketing Software master installer.
`installer_`*`product initials and product version number`*`.properties`	The sample response file for the Marketing Platform installer. For example, `installer_ump`*`n.n.n.n`*`.properties` is the response file of the Marketing Platform installer, where *n.n.n.n* is the version number.
`installer_`*`report pack initials, product initials, and version number`*`.properties`	The sample response file for the reports pack installer. For example, `installer_urpc`*`n.n.n.n`*`.properties` is the response file of the Campaign reports pack installer, where *n.n.n.n* is the version number

Marketing Platform documentation and help

IBM Marketing Platform provides documentation and help for users, administrators, and developers.

Table 3. Get up and running

Task	Documentation
View a list of new features, known issues, and workarounds	*IBM Marketing Platform Release Notes*
Learn about the structure of the Marketing Platform database	*IBM Marketing Platform System Tables*
Install or upgrade Marketing Platform and deploy the Marketing Platform web application	One of the following guides: • *IBM Marketing Platform Installation Guide* • *IBM Marketing Platform Upgrade Guide*
Implement the IBM Cognos® reports provided with IBM Marketing Software	*IBM Marketing Software Reports Installation and Configuration Guide*

Table 4. Configure and use Marketing Platform

Task	Documentation
• Adjust configuration and security settings for IBM products • Integrate with external systems such as LDAP and web access control • Implement single sign-on with diverse applications using SAML 2.0-based federated authentication or single sign-on • Run utilities to perform maintenance on IBM products • Configure and use audit event tracking • Schedule runs of IBM Marketing Software objects	*IBM Marketing Platform Administrator's Guide*

Table 5. Get help

Task	Instructions
Open online help	1. To open a context-sensitive help topic, choose **Help > Help for this page**. 2. To view complete online help, choose **Help > Product documentation** and click the **IBM Marketing Platform in Knowledge Center** link. You must have web access to view context-sensitive online help. Contact IBM Support for more information about accessing and installing IBM Knowledge Center locally for offline documentation.
Obtain PDFs	Use either of the following methods: • Choose **Help > Product documentation** to access Marketing Platform PDFs and help. • Choose **Help > All IBM Marketing Software Documentation** to access documentation for all products.
IBM Knowledge Center	To access the IBM Knowledge Center, choose **Help > Support for this product**.
Get support	Go to http://www.ibm.com/support to access the IBM Support Portal.

Chapter 2. Planning the Marketing Platform upgrade

You can upgrade your current version of Marketing Platform to bring it up-to-date with the latest features.

Prerequisites

Before you install or upgrade any IBM Marketing Software product, you must ensure that your computer complies with all of the prerequisite software and hardware.

System requirements

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

In order for Opportunity Detect to connect to the DB2 database, the DB2 installation must include the install header files in the `/home/db2inst1/include` directory on client machine. To include the header files in the installation, select the **Custom Install** option when you install DB2 and select the **Base Application Development Tools** feature.

DB2 requirements

In order for Opportunity Detect to connect to the DB2 database, the DB2 installation must include the install header files in the `home/db2inst1/include` directory on client machine. To include the header files in the installation, select the **Custom Install** option when you install DB2 and select the **Base Application Development Tools** feature.

Network domain requirements

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

JVM requirements

IBM Marketing Software applications within a suite must be deployed on a dedicated Java™ virtual machine (JVM). IBM Marketing Software products customize the JVM that is used by the web application server. If you encounter errors that are related to the JVM, you must create an Oracle WebLogic or WebSphere® domain that is dedicated to the IBM Marketing Software products.

Knowledge requirements

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

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Internet browser settings

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

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

Access permissions

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

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

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

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

Note: If you are installing version 11.0.1 with non-root user permissions and you plan to install IBM Campaign using those non-root user credentials, then you must add that user into the Sudo list so that the GSKIT components are installed successfully. Refer to the IBM Campaign Installation Guide for more information.

JAVA_HOME environment variable

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

If the **JAVA_HOME** environment variable points to an incorrect JRE, you must clear the **JAVA_HOME** variable before you run the IBM Marketing Software installers.

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

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

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

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

Marketing Platform installation worksheet

Use the Marketing Platform installation worksheet to gather information about the Marketing Platform database and about other IBM Marketing Software products that are required for the installation of Marketing Platform.

Use the following table to gather information about the database that contains your Marketing Platform system tables:

Table 6. Information about the database

Field	**Notes**®
Database type	
Database name	
Database account user name	
Database account password	
JNDI name	UnicaPlatformDS
ODBC name	

Checklist for Marketing Platform database

The installation wizards for each IBM Marketing Software product must be able to communicate with the Marketing Platform system table database to register the product. Each time that you run the installer, you must enter the following database connection information for the Marketing Platform system table database:

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

Checklist for IBM Marketing Platform deployment on the web application server

Obtain the following information before deploying Marketing Platform:

- Protocol: HTTP or HTTPS if SSL is implemented in the web application server.
- Host: The name of the machine on which the Marketing Platform will be deployed.
- Port: The port on which the web application server listens.
- Domain name: The company domain of each machine where IBM products are installed. For example, `mycompany.com`. All IBM products must be installed in the same company domain, and you must enter the domain name in all lower-case letters.

  If there is a mis-match in domain name entries, you may encounter problems when you attempt to use Marketing Platform features or navigate among products. You can change the domain name after the products are deployed by logging in and changing values of the relevant configuration properties in the product navigation categories on the **Settings > Configuration** page.

Checklist for enabling Marketing Platform utilities

If you plan to use the Marketing Platform utilities, obtain the following JDBC connection information before you start to install the Marketing Platform.

- Path to the JRE. The default value is the path to the 1.7 version of the JRE that the installer places under your IBM installation directory.

  You can accept this default or specify a different path. If you specify a different path, you must point to the 1.7 or 1.8 version of the Sun JRE.
- JDBC driver class. The installer automatically provides this, based on the database type you specifiy in the installer.
- JDBC connection URL. The installer provides the basic syntax, including the host name, database name, and port. You can customize the URL by adding additional parameters.
- JDBC driver classpath on your system.

Information about the web component

Obtain the following information for all IBM Marketing Software products that have a web component, which you deploy on a web application server:

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

IBM Site ID

If you are installing an IBM Marketing Software product in one of the countries listed on the Country for Install screen of your product installer, you must enter your IBM Site ID in the space provided. Your IBM Site ID can be found on one of the following documents:

- IBM Welcome letter
- Tech Support Welcome letter
- Proof of Entitlement letter
- Other communications that are sent when you purchase your software

IBM might use the data that is provided by the installed software to better understand how customers use our products and to improve customer support. The data that is gathered does not include any information that identifies individuals. Complete the following actions if you do not want to have such information to be collected:

1. After Marketing Platform is installed, log on to Marketing Platform as a user with administration privileges.
2. Go to **Settings > Configuration**, and set the **Disable Page Tagging** property under the **Platform** category to True.

Upgrade prerequisites for all IBM Marketing Software products

Meet all requirements for permissions, operating system, and knowledge correctly before you upgrade Marketing Platform to ensure a seamless upgrade experience.

Removing response files generated by previous installations

If you are upgrading from a version before 8.6.0, you must delete the response files that are generated by previous Marketing Platform installations. Old response files are not compatible with the 8.6.0 and later installers.

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

The IBM response file is named `installer.properties`.

The response files for each product are named `installer_productversion.properties`.

The installer creates response files in the directory that you specify during installation. The default location is the home directory of the user.

User account requirement for UNIX

On UNIX, the user account that installed the product must complete the upgrade, otherwise the installer fails to detect a previous installation.

32-bit to 64-bit version upgrades

If you are moving from a 32-bit to a 64-bit version of Marketing Platform, ensure that you complete the following tasks:

- Ensure that the database client libraries for your product data sources are 64-bit.
- Ensure that all relevant library paths, for example startup or environment scripts, correctly reference the 64-bit versions of your database drivers.

Auto commit requirement for Oracle or DB2

If your Marketing Platform system tables are in Oracle or DB2®, you must enable the auto-commit mode for the environment open.

See the Oracle or DB2 documentation for instructions.

Change in names of user-defined groups and roles

You must upgrade Marketing Platform before you upgrade Campaign. To avoid problems when you upgrade the Marketing Platform, the names of the groups and roles that are created by the user must be different from the names of the groups or roles that are defined by Marketing Platform.

If the names are same, you must change the group or role names that you created before the upgrade. For example, if you have created a group or role called Admin, you must change the name, because Admin is a name that is used in Campaign.

Time zone support for scheduler

In Marketing Platform you can use the Scheduler to configure a process to run at intervals that you define. With the Scheduler, you can schedule Campaign flowchart runs, Contact Optimization optimization sessions and post-optimization flowchart runs, and eMessage mailings.

To take advantage of the time zone support in the Scheduler, edit your scheduled tasks and select the new time zone as required. See the *IBM Marketing Platform Administrator's Guide* for information about using the Scheduler.

Digital Analytics dashboard portlets

If you have any dashboards that contain custom Digital Analytics portlets, you must recreate those portlets after your upgrade is complete.

Backing up the corporatetheme.css file and branding images

If you rebranded the IBM frameset as described in the *IBM Marketing Platform Administrator's Guide*, you must back up the files that you modified before you upgrade Marketing Platform. You must restore the files after you complete the upgrade operation, but before you deploy the new version of Marketing Platform.

Typically, the `corporatetheme.css` file and branding images have to be modified. The `corporatetheme.css` file and the branding images are located under the `css\theme` directory in the `unica.war` file.

Complete the following steps to back up the `corporatetheme.css` file and the branding images:

1. Make a backup copy of the `unica.war` file before you start the upgrade procedure for Marketing Platform.
2. Extract the `unica.war` file and set aside copies of the `corporatetheme.css` file and the branding images.
3. Proceed with the upgrade for Marketing Platform, but do not deploy Marketing Platform.
4. Extract the new `unica.war` file, and overwrite the existing images and the `corporatetheme.css` file with your backed-up versions.
5. Rewar the new `unica.war` file, and deploy Marketing Platform.

See the *IBM Marketing Platform Administrator's Guide* for more details on rebranding.

Marketing Platform upgrade scenarios

Upgrade your installation of Marketing Platform after you understand the guidelines that apply to your current version of Marketing Platform.

Follow the guidelines in the following table for upgrading Marketing Platform.

Table 7. Marketing Platform upgrade scenarios

Marketing Platform source version	**Upgrade path**
7.x, 8.0.x, 8.1.x, 8.2.x, and 8.5.x	A direct upgrade is not supported. Complete the following steps to upgrade to Marketing Platform version 11.0.1. 1. Upgrade from your current version to version 8.6.0. To complete the upgrade to version 8.6.0, obtain the software and follow the instructions in the installation guide for that version. **Note:** Versions before 9.1.1 did not have a separate upgrade guide; upgrade instructions were included in the installation guide. 2. Upgrade from version 8.6.0 to version 10.0. To complete the upgrade to version 10.0, obtain the software and follow the instructions in the IBM Marketing Platform 10.0 Upgrade guide. 3. Upgrade from version 10.0.0 to version 10.1.0. To complete the upgrade to version 10.1, obtain the software and follow the instructions in the IBM Marketing Platform 10.1 Upgrade guide. 4. Upgrade from version 10.1.x to version 11.0.0. To complete the upgrade to version 11.0.0, obtain the software and follow the instructions in this upgrade guide. 5. Upgrade from version 11.0.0 to version 11.0.1. To complete the upgrade to version 11.0.1, obtain the software and follow the instructions in this upgrade guide.

Table 7. Marketing Platform upgrade scenarios (continued)

Marketing Platform source version	Upgrade path
8.6.x and above	Upgrade your installation of Marketing Platform as described in one of the following topics. • The Marketing Platform upgrade installer can automatically complete the data migration that is required for an upgrade. If you want to allow the installer to create system tables in your database automatically, complete the following steps: 1. If you are upgrading from a version prior to 10.0, you must first upgrade to version 10.0 and then upgrade to version 10.1. For information about upgrading to version 10.0, see the IBM Marketing Platform 10.0 Upgrade Guide. 2. Upgrade to version 10.1. For more information, see Chapter 3, "Upgrading from version 10.0 and above with automatic migration," on page 17. • If your organization's policy does not allow automatic data migration, you must complete the procedure to upgrade manually. If you want to create system tables in your database manually, see one of the following topics. – Chapter 4, "Upgrading from version 8.6.0 with manual migration," on page 19 – Chapter 5, "Upgrading from version 9.0 with manual migration," on page 27 – Chapter 6, "Upgrading from version 9.1.0 with manual migration," on page 35 – Chapter 7, "Upgrading from version 9.1.1 with manual migration," on page 41 – Chapter 8, "Upgrading from version 9.1.2 with manual migration," on page 45 – Chapter 9, "Upgrading from version 10.0.0 with manual migration," on page 49 – Chapter 10, "Upgrading from version 10.1.0 with manual migration," on page 53 – Chapter 11, "Upgrading from version 11.0.0 with manual migration," on page 57

Correcting the registry file when upgrade installation fails

If installation fails because the installer could not detect the base version of your installed product, you can correct the registry file as described here.

The InstallAnywhere Global registry file, named `.com.zerog.registry.xml`, is created when a IBM Marketing Software product is installed. The registry file tracks all installed IBM Marketing Software products, including their features and components, on that server.

1. Locate the `.com.zerog.registry.xml` file.

   Depending on the server on which you are installing, the `.com.zerog.registry.xml` file is in one of the following locations.

   • On Windows servers, the file is in the `Program Files/Zero G Registry` folder.

     `Zero G Registry` is a hidden directory. You must enable the setting to view hidden files and folders.

   • On UNIX systems, the file is in one of the following directories.

  - Root user - `/var/`
  - Non-root user - `$HOME/`
- On Mac OSX servers, the file is in the `/library/preferences/` folder.

2. Make a backup copy of the file.
3. Edit the file to change all entries that refer to the version of your installed product.

   For example, this is a section of the file that corresponds to IBM Campaign version 8.6.0.3.

   ```
   <product name="Campaign" id="dd6f88e0-1ef1-11b2-accf-c518be47c366"
   version=" 8.6.0.3 " copyright="2013" info_url="" support_url=""
   location="<IBM_Unica_Home>\Campaign" last_modified="2013-07-25 15:34:01">
   ```

   In this case, you would change all entries that refer to `version=" 8.6.0.3 "` to the base version, which is 8.6.0.0 in this case.

Chapter 3. Upgrading from version 10.0 and above with automatic migration

Automatic migration allows the installer to run the SQL script and insert the configuration properties that are required to upgrade your Marketing Platform system tables. If your company policy does not allow automated updates to your system table database, you must use manual migration, described elsewhere in this guide.

Important: If you are upgrading from a version prior to 10.1, you must first upgrade to version 10.1 and then upgrade to version 11.0.1. For information about upgrading to version 10.1, see the IBM Marketing Platform 10.1 Upgrade Guide.

Ensure that you have the following installers in the same directory.

- The IBM Marketing Software master installer
- The Marketing Platform installer

Use the following guidelines as a best practice.

- Place the installers in the same directory where you originally placed the installers for the earlier versions of your products.
- Remove any earlier versions of the IBM Marketing Software product installers from the directory to avoid having the master installer attempt to install the earlier versions.

Upgrading from version 10.0 and above is an in-place upgrade. In an in-place upgrade, you install the upgraded version of Marketing Platform to the directory where your current Marketing Platform is installed.

See “Marketing Platform upgrade scenarios” on page 13 for information about upgrading from earlier versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory, which is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and launches the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.

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a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
b. Select **Automatic database setup**.
c. Follow the remaining steps in the installation wizard and enter the requested information.

5. Deploy your installation.

   Note: Pay close attention to the installation summary windows. If errors are reported, check the installer log files and contact IBM Marketing Software technical support if necessary.

Chapter 4. Upgrading from version 8.6.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70
- "alertConfigTool" on page 69

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.

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c. Select **Manual database setup**.
d. Clear the **Run Platform configuration** check box.
e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 8. SQL scripts for upgrades from version 8.6.0

File details	File location
db2_unicode_fix_90.sql Applies only to DB2 system tables	db\upgrade86to90 directory under your Marketing Platform installation
drop-liferay-tables.sql	db\upgrade86to90 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_90upg.sql	db\upgrade86to90 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_91upg.sql	db\upgrade90to91 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_911upg.sql	db\upgrade91to911 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10upg.sql	db\upgrade912to10 directory under your Marketing Platform installation
*DB_Type*_QRTZ_Scheduler_10_upgrade_Script.sql	db\upgrade912to10 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Run the upgrade86to90 batch or shell script, located the tools\bin\upgrade86to90 directory under your Marketing Platform installation.
7. Run the upgrade90to91 batch or shell script, located the tools\bin\upgrade90to91 directory under your Marketing Platform installation.
8. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager
9. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 9. Configuration properties for upgrades from version 8.6.0

File details	Example command
Skip this import if the property named **LDAP BaseDN periodic search enabled** is present under the **Platform | Security | Login method details | LDAP synchronization** category. If the property is not present, perform the following import. • File: `Ldap_Auto_Sync_BaseDN_Settings.xml` • Location: `conf\upgrade86to90` directory under your Marketing Platform installation • Purpose: Import a configuration property that enables LDAP import search by DN	`configTool.bat -i -p "Affinium|suite|security| ldapSynchronization|ldapProperties" -f "C:\Unica\Platform\conf \upgrade86to90\ Ldap_Auto_Sync_BaseDN_Settings.xml"`
• File: `quicklinks_category.xml` • Location: `conf\upgrade86to90` directory under your Marketing Platform installation • Purpose: Import properties for quicklinks dashboard portlets	`configTool.bat -i -o -p "Affinium|suite" -f "C:\Unica\Platform\conf\upgrade86to90\ quicklinks_category.xml"`
• File: `communication_email.xml` • Location: `conf\upgrade86to90` directory under your Marketing Platform installation • Purpose: Import configuration properties to enable email notifications	`configTool.bat -i -o -p "Affinium|Manager" -f "C:\Unica\Platform\conf\upgrade86to90\ communication_email.xml"`
• File: `notification.xml` • Location: `conf\upgrade86to90` directory under your Marketing Platform installation • Purpose: Import configuration properties for the notification feature. The following properties are added. Default values are as follows. – The number of days to retain alerts - 90 – Frequency in minutes at which emails are sent - 30 – Maximum number of retries for sending an email - 1	`configTool.bat -i -o -p "Affinium|suite" -f "C:\Unica\Platform\conf\upgrade86to90\ notification.xml"`
• File: `manager_alerts_registration.xml` • Location: `conf` directory under your Marketing Platform installation • Purpose: Import configuration properties that create the alerts menu items	`configTool.bat -i -o -p "Affinium|suite|uiNavigation|alerts" -f "C:\Unica\Platform\conf\ manager_alerts_registration.xml"`
• File: `is_clustered.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: The boolean property to specify if the Marketing Platform instance is clustered. If you install Marketing Platform in a clustered deployment, set this property to True. Otherwise, retain the default value of False.	`configTool.bat -i -p "Affinium|suite" -f "C:\Unica\Platform\conf\upgrade90to91\ is_clustered.xml"`

Table 9. Configuration properties for upgrades from version 8.6.0 (continued)

File details	Example command
• File: taskNotificationNavImport.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: Import the **My job notifications** navigation option under the **Settings** menu	configTool.bat -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "C:\Unica\Platform\conf\upgrade90to91\ taskNotificationNavImport.xml"
• File: taskNotification.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: Imports the **Group Name** field where you can enter the groups that are notified with scheduled notifications	configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| Campaign|flowchart" -f "C:\Unica\Platform\conf\ upgrade90to91\ taskNotification.xml" configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| Campaign|mailing" -f "C:\Unica\Platform\conf\ upgrade90to91\ taskNotification.xml" configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| Campaign|optimize" -f "C:\Unica\Platform\conf\ upgrade90to91\ taskNotification.xml" configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| InteractionHistory|ETL" -f "C:\Unica\Platform\conf\ upgrade90to91\ taskNotification.xml" configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| AttributionModeler|TrainingRun" -f "C:\Unica\Platform\conf\upgrade90to91\ taskNotification.xml" configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations| AttributionModeler|ScoringRun" -f "C:\Unica\Platform\conf\upgrade90to91\ taskNotification.xml"
• File: cognos.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: Update the Cognos version	configTool.bat -i -o -p "Affinium|Report|integrations|cognos10" -f "C:\Unica\Platform\conf\upgrade90to91\cognos.xml"
• File: scheduler.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: The boolean property to enable or disable the scheduler feature in Marketing Platform	configTool.bat -i -p "Affinium|suite|scheduler" -f "C:\Unica\Platform\conf\upgrade90to91\ scheduler.xml"

Table 9. Configuration properties for upgrades from version 8.6.0 (continued)

File details	Example command
• File: `unknownPolling.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: Imports properties for quicklinks dashboard portlets	`configTool.bat -i -p "Affinium|suite|scheduler" -f "C:\Unica\Platform\conf\upgrade90to91\ unknownPolling.xml"`
• File: `config_data_filter_cache.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: Allows you to configure the data filter cache. If the configuration property is set to True, the data filter cache is enabled for enhanced performance. If the configuration property is set to False, the caching is not enabled, and all operations are completed by connecting to the database for each data filter request. The configuration property is visible on the user interface.	`configTool.bat -vp -p "Affinium|Manager|datafiltering" -f "C:\Unica\Platform\conf\upgrade90to91\ Config_data_filter_cache.xml"` **Note:** If you change this value, you must restart the Marketing Platform for the changes to take effect.
• File: `Refresh_data_filter_cache.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: If data filter caching is enabled, this configuration property ensures that the cache is refreshed every time that there is a change in the data filter definitions	`configTool.bat -vp -p "Affinium|Manager|datafiltering" -f "C:\Unica\Platform\conf\upgrade90to91\ Refresh_data_filter_cache.xml"`

• Files: `emm_spss_navigation.xml` and `emm_spss_configuration.xml`
• Location: `conf` directory under your Marketing Platform installation
• Purpose: Import IBM SPSS® Modeler Advantage Enterprise Marketing Management Edition configuration properties
	`configTool.bat -i -o -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "C:\Unica\Platform\conf\emm_spss_navigation.xml"`
	
	`configTool.bat -i -o -p "Affinium" -f "C:\Unica\Platform\conf\emm_spss_configuration.xml"`

• File: `AuditEvents.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Audit Events** configuration node	`configTool.bat -i -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade91to911\ AuditEvents.xml`
• File: `FederatedAuthentication.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Federated Authentication** configuration node	`configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade91to911\ FederatedAuthentication.xml`
• File: `MO_bulk_deactivation_scheduler.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the configuration node for the bulk deactivation schedule feature for Marketing Operations	`configTool.bat -i -p "Affinium|suite|scheduler| taskRegistrations" -f C:\Unica\Platform\conf\ upgrade91to911\ MO_bulk_deactivation_scheduler.xml`

Table 9. Configuration properties for upgrades from version 8.6.0 (continued)

File details	Example command
• File: `emm_audit_navigation.xml` • Location: `conf` directory under your Marketing Platform installation • Purpose: Import the **Analytics > Marketing Platform** menu item for Audit Event reports	`configTool.bat -i -p "Affinium|suite|uiNavigation|mainMenu| Analytics" -f C:\Unica\Platform\conf\ emm_audit_navigation.xml`
• File: `APISecurity.xml` • Location: `conf\upgrade911to912` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade911to912\ APISecurity.xml`
• File: `APISecurity.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ APISecurity.xml` Note that this version of the `APISecurity.xml` file is different from the one shown in the previous row and is in a different location.
• File: `SAMLAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | SAML2.0** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthentication.xml`
• File: `SAMLAuthenticationDetails.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Login method details | SAML 2.0** configuration nodes	`configTool.bat -vp -p "Affinium|suite|security|loginModes" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthenticationDetails.xml`
• File: `ExternalScheduler.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Scheduler | Scheduler registrations | IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite|scheduler| taskRegistrations" -f C:\Unica\Platform\conf\ upgrade912to10\ExternalScheduler.xml`
• File: `JWTAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | JWT authentication** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ JWTAuthentication.xml`
• File: `SecureSuiteStaticContent.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **Apply security on static content for all applications** property under the **IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade912to10\ SecureSuiteStaticContent.xml`

Table 9. Configuration properties for upgrades from version 8.6.0 (continued)

File details	Example command
• File: APISecurity_interactCollection.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml
• File: APISecurity_triggeredMessages.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml
• File: supportServer_config.xml • Location: conf\upgrade10to101 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml
• File: cognos11_integration.xml • Location: conf\upgrade101to11 directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml
• File: watsonAssistant_navigation.xml • Location: <PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"

10. Use the alertConfigTool utility to register the Marketing Platform alerts and notifications, as follows.

    The alertConfigToolutility is in the tools\bin directory under your Marketing Platform installation.

    Run this utility from the tools\bin directory. You reference the Platform_alerts_configuration.xml file, which is in the conf directory under your Marketing Platform installation.

    Example command (Windows): alertConfigTool.bat -i -f C:\Unica\Platform\conf\Platform_alerts_configuration.xml
11. Restart the web application server on which Marketing Platform is deployed so the changes are applied.
12. Complete the following steps to update the **Help > About** page.
    a. Use the **configTool** utility to export the **Affinium \| Manager \| about** category.

       Note: The **Affinium \| Manager \| about** category is not visible on the Configuration page because it is marked hidden.
       Example (Windows):

```
configTool.bat -x -p "Affinium|Manager|about" -f "C:\Unica\Platform\
conf\about.xml"
```

b. Edit the exported XML file that you just created (`about.xml` in the example) to change the version number and display name.

   Find the `releaseNumber` property and change the value to the current version of Marketing Platform. Change the value of the `copyright` property to the appropriate copyright year. In the following example, change the release number from 8.6.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>8.6.0.0.0.build_number</value>
</property>
<property id="541" name="copyright" type="string_property" width="40">
<value>2016</value>
</property>
```

c. Use the **configTool** utility to import the revised file.

   You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

```
configTool.bat -vp -i -p "Affinium|Manager" -f "C:\Unica\Platform\
conf\about.xml" -o
```

13. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 5. Upgrading from version 9.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.
   d. Clear the **Run Platform configuration** check box.

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e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 10. SQL scripts for upgrades from version 9.0

File details	File location
ManagerSchema_*DB_Type*_91upg.sql	db\upgrade90to91 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_911upg.sql	db\upgrade91to911 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10upg.sql	db\upgrade912to10 directory under your Marketing Platform installation
*DB_Type*_QRTZ_Scheduler_10_upgrade_Script.sql	db\upgrade912to10 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Run the upgrade90to91 batch or shell script, located the tools\bin\upgrade90to91 directory under your Marketing Platform installation.
7. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager
8. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 11. Configuration properties for upgrades from version 9.0.0

File details	Example command
• File: is_clustered.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: The boolean property to specify if the Marketing Platform instance is clustered. If you install Marketing Platform in a clustered deployment, set this property to True. Otherwise, retain the default value of False.	configTool.bat -i -p "Affinium|suite" -f "C:\Unica\Platform\conf\upgrade90to91\is_clustered.xml"
• File: taskNotificationNavImport.xml • Location: conf\upgrade90to91 directory under your Marketing Platform installation • Purpose: Import the **My job notifications** navigation option under the **Settings** menu	configTool.bat -i -p "Affinium|suite|uiNavigation|settingsMenu" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotificationNavImport.xml"

Table 11. Configuration properties for upgrades from version 9.0.0 (continued)

File details	Example command

• File: `taskNotification.xml`
• Location: `conf\upgrade90to91` directory under your Marketing Platform installation
• Purpose: Imports the **Group Name** field where you can enter the groups that are notified with scheduled notifications
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|Campaign|flowchart" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`
	
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|Campaign|mailing" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`
	
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|Campaign|optimize" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`
	
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|InteractionHistory|ETL" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`
	
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|AttributionModeler|TrainingRun" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`
	
	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations|AttributionModeler|ScoringRun" -f "C:\Unica\Platform\conf\upgrade90to91\taskNotification.xml"`

• File: `cognos.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: Update the Cognos version	`configTool.bat -i -o -p "Affinium|Report|integrations|cognos10" -f "C:\Unica\Platform\conf\upgrade90to91\cognos.xml"`
• File: `scheduler.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: The boolean property to enable or disable the scheduler feature in Marketing Platform	`configTool.bat -i -p "Affinium|suite|scheduler" -f "C:\Unica\Platform\conf\upgrade90to91\scheduler.xml"`
• File: `unknownPolling.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: Imports properties for quicklinks dashboard portlets	`configTool.bat -i -p "Affinium|suite|scheduler" -f "C:\Unica\Platform\conf\upgrade90to91\unknownPolling.xml"`

Table 11. Configuration properties for upgrades from version 9.0.0 (continued)

File details	Example command
• File: `config_data_filter_cache.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: Allows you to configure the data filter cache. If the configuration property is set to True, the data filter cache is enabled for enhanced performance. If the configuration property is set to False, the caching is not enabled, and all operations are completed by connecting to the database for each data filter request. The configuration property is visible on the user interface.	`configTool.bat -vp -p "Affinium|Manager|datafiltering" -f "C:\Unica\Platform\conf\upgrade90to91\Config_data_filter_cache.xml"` **Note:** If you change this value, you must restart the Marketing Platform for the changes to take effect.
• File: `Refresh_data_filter_cache.xml` • Location: `conf\upgrade90to91` directory under your Marketing Platform installation • Purpose: If data filter caching is enabled, this configuration property ensures that the cache is refreshed every time that there is a change in the data filter definitions	`configTool.bat -vp -p "Affinium|Manager|datafiltering" -f "C:\Unica\Platform\conf\upgrade90to91\Refresh_data_filter_cache.xml"`

• Files: `emm_spss_navigation.xml` and `emm_spss_configuration.xml`
• Location: `conf` directory under your Marketing Platform installation
• Purpose: Import IBM SPSS Modeler Advantage Enterprise Marketing Management Edition configuration properties
	`configTool.bat -i -o -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "C:\Unica\Platform\conf\emm_spss_navigation.xml"`
	
	`configTool.bat -i -o -p "Affinium" -f "C:\Unica\Platform\conf\emm_spss_configuration.xml"`

• File: `AuditEvents.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Audit Events** configuration node	`configTool.bat -i -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade91to911\AuditEvents.xml`
• File: `FederatedAuthentication.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Federated Authentication** configuration node	`configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade91to911\FederatedAuthentication.xml`
• File: `MO_bulk_deactivation_scheduler.xml` • Location: `conf\upgrade91to911` directory under your Marketing Platform installation • Purpose: Import the configuration node for the bulk deactivation schedule feature for Marketing Operations	`configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations" -f C:\Unica\Platform\conf\upgrade91to911\MO_bulk_deactivation_scheduler.xml`
• File: `emm_audit_navigation.xml` • Location: `conf` directory under your Marketing Platform installation • Purpose: Import the **Analytics > Marketing Platform** menu item for Audit Event reports	`configTool.bat -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f C:\Unica\Platform\conf\emm_audit_navigation.xml`

Table 11. Configuration properties for upgrades from version 9.0.0 (continued)

File details	Example command
• File: `APISecurity.xml` • Location: `conf\upgrade911to912` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade911to912\ APISecurity.xml`
• File: `APISecurity.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ APISecurity.xml` Note that this version of the `APISecurity.xml` file is different from the one shown in the previous row and is in a different location.
• File: `SAMLAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | SAML2.0** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthentication.xml`
• File: `SAMLAuthenticationDetails.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Login method details | SAML 2.0** configuration nodes	`configTool.bat -vp -p "Affinium|suite|security|loginModes" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthenticationDetails.xml`
• File: `ExternalScheduler.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Scheduler | Scheduler registrations | IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite|scheduler| taskRegistrations" -f C:\Unica\Platform\conf\ upgrade912to10\ExternalScheduler.xml`
• File: `JWTAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | JWT authentication** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ JWTAuthentication.xml`
• File: `SecureSuiteStaticContent.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **Apply security on static content for all applications** property under the **IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade912to10\ SecureSuiteStaticContent.xml`
• File: `APISecurity_interactCollection.xml` • Location: `conf\upgrade10to1001` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	`configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml`

Table 11. Configuration properties for upgrades from version 9.0.0 (continued)

File details	Example command
• File: APISecurity_triggeredMessages.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml
• File: supportServer_config.xml • Location: conf\upgrade10to101 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml
• File: cognos11_integration.xml • Location: conf\upgrade101to11 directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml
• File: watsonAssistant_navigation.xml • Location: <PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"

9. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
10. Complete the following steps to update the **Help > About** page.
    a. Use the **configTool** utility to export the **Affinium \| Manager \| about** category.

       Note: The **Affinium \| Manager \| about** category is not visible on the Configuration page because it is marked hidden.
       Example (Windows):

       ```
       configTool.bat  -x -p "Affinium|Manager|about" -f
       "C:\Unica\Platform\conf\about.xml"
       ```

    b. Edit the exported XML file that you just created (about.xml in the example) to change the version number and display name.

       Find the releaseNumber property and change the value to the current version of Marketing Platform. Change the value of the copyright property to the appropriate copyright year. In the following example, change the release number from 9.0.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

       ```
       <property name="releaseNumber" type="string">
       <displayNameKey>about.releaseNumber</displayNameKey>
       <value>9.0.0.0.0.build_number</value>
       </property>
       ```

```
</property>
<property id="541" name="copyright" type="string_property" width="40">
<value>2016</value>
</property>
```

c. Use the **configTool** utility to import the revised file.

   You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

   ```
   configTool.bat -vp -i -p "Affinium|Manager" -f "C:\Unica\Platform\
   conf\about.xml" -o
   ```

11. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 6. Upgrading from version 9.1.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.

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d. Clear the **Run Platform configuration** check box.
e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 12. SQL scripts for upgrades from version 9.1.0

File details	File location
ManagerSchema_*DB_Type*_911upg.sql	db\upgrade91to911 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10upg.sql	db\upgrade912to10 directory under your Marketing Platform installation
*DB_Type*_QRTZ_Scheduler_10_upgrade_Script.sql	db\upgrade912to10 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager

7. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 13. Configuration properties for upgrades from version 9.1.0

File details	Example command
• File: AuditEvents.xml • Location: conf\upgrade91to911 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Audit Events** configuration node	configTool.bat -i -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade91to911\AuditEvents.xml
• File: FederatedAuthentication.xml • Location: conf\upgrade91to911 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Federated Authentication** configuration node	configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade91to911\FederatedAuthentication.xml
• File: MO_bulk_deactivation_scheduler.xml • Location: conf\upgrade91to911 directory under your Marketing Platform installation • Purpose: Import the configuration node for the bulk deactivation schedule feature for Marketing Operations	configTool.bat -i -p "Affinium|suite|scheduler|taskRegistrations" -f C:\Unica\Platform\conf\upgrade91to911\MO_bulk_deactivation_scheduler.xml

Table 13. Configuration properties for upgrades from version 9.1.0 (continued)

File details	Example command
• File: `emm_audit_navigation.xml` • Location: `conf` directory under your Marketing Platform installation • Purpose: Import the **Analytics > Marketing Platform** menu item for Audit Event reports	`configTool.bat -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f C:\Unica\Platform\conf\emm_audit_navigation.xml`
• File: `APISecurity.xml` • Location: `conf\upgrade911to912` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade911to912\APISecurity.xml`
• File: `APISecurity.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\APISecurity.xml` Note that this version of the `APISecurity.xml` file is different from the one shown in the previous row and is in a different location.
• File: `SAMLAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | SAML2.0** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\SAMLAuthentication.xml`
• File: `SAMLAuthenticationDetails.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Login method details | SAML 2.0** configuration nodes	`configTool.bat -vp -p "Affinium|suite|security|loginModes" -f C:\Unica\Platform\conf\upgrade912to10\SAMLAuthenticationDetails.xml`
• File: `ExternalScheduler.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Scheduler | Scheduler registrations | IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite|scheduler|taskRegistrations" -f C:\Unica\Platform\conf\upgrade912to10\ExternalScheduler.xml`
• File: `JWTAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | JWT authentication** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\JWTAuthentication.xml`
• File: `SecureSuiteStaticContent.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **Apply security on static content for all applications** property under the **IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade912to10\SecureSuiteStaticContent.xml`

Table 13. Configuration properties for upgrades from version 9.1.0 (continued)

File details	Example command
• File: APISecurity_interactCollection.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml
• File: APISecurity_triggeredMessages.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml
• File: supportServer_config.xml • Location: conf\upgrade10to101 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml
• File: cognos11_integration.xml • Location: conf\upgrade101to11 directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml
• File: watsonAssistant_navigation.xml • Location: <PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"

8. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
9. Complete the following steps to update the **Help > About** page.
   a. Use the **configTool** utility to export the **Affinium \| Manager \| about** category.

      Note: The **Affinium \| Manager \| about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat  -x -p "Affinium|Manager|about" -f
      "C:\Unica\Platform\conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (about.xml in the example) to change the version number and display name.

      Find the releaseNumber property and change the value to the current version of Marketing Platform. Change the value of the copyright

property to the appropriate copyright year. In the following example, change the release number from 9.1.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>9.1.0.0.0.build_number</value>
</property>
</property>
<property id="541" name="copyright" type="string_property" width="40">
<value>2016</value>
</property>
```

c. Use the **configTool** utility to import the revised file.

   You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

   ```
   configTool.bat -vp -i -p "Affinium|Manager" -f "C:\Unica\Platform\
   conf\about.xml" -o
   ```

10. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 7. Upgrading from version 9.1.1 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.

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d. Clear the **Run Platform configuration** check box.

e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 14. SQL scripts for upgrades from version 9.1.1

File details	File location
ManagerSchema_*DB_Type*_10upg.sql	db\upgrade912to10 directory under your Marketing Platform installation
*DB_Type*_QRTZ_Scheduler_10_upgrade_Script.sql	db\upgrade912to10 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager

7. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 15. Configuration properties for upgrades from version 9.1.1

File details	Example command
• File: emm_audit_navigation.xml • Location: conf directory under your Marketing Platform installation • Purpose: Import the **Analytics > Marketing Platform** menu item for Audit Event reports	configTool.bat -i -p "Affinium|suite|uiNavigation|mainMenu| Analytics" -f C:\Unica\Platform\conf\ emm_audit_navigation.xml
• File: APISecurity.xml • Location: conf\upgrade911to912 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	configTool.bat -i -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade911to912\ APISecurity.xml
• File: APISecurity.xml • Location: conf\upgrade912to10 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ APISecurity.xml Note that this version of the APISecurity.xml file is different from the one shown in the previous row and is in a different location

Table 15. Configuration properties for upgrades from version 9.1.1 (continued)

File details	Example command
• File: `SAMLAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | SAML2.0** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthentication.xml`
• File: `SAMLAuthenticationDetails.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Login method details | SAML 2.0** configuration nodes	`configTool.bat -vp -p "Affinium|suite|security|loginModes" -f C:\Unica\Platform\conf\upgrade912to10\ SAMLAuthenticationDetails.xml`
• File: `ExternalScheduler.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Scheduler | Scheduler registrations | IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite|scheduler| taskRegistrations" -f C:\Unica\Platform\conf\ upgrade912to10\ExternalScheduler.xml`
• File: `JWTAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | JWT authentication** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ JWTAuthentication.xml`
• File: `SecureSuiteStaticContent.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **Apply security on static content for all applications** property under the **IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade912to10\ SecureSuiteStaticContent.xml`
• File: `APISecurity_interactCollection.xml` • Location: `conf\upgrade10to1001` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	`configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml`
• File: `APISecurity_triggeredMessages.xml` • Location: `conf\upgrade10to1001` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	`configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml`
• File: `supportServer_config.xml` • Location: `conf\upgrade10to101` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	`configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml`

Table 15. Configuration properties for upgrades from version 9.1.1 (continued)

File details	Example command
• File: `cognos11_integration.xml` • Location: `conf\upgrade101to11` directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	`configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml`
• File: watsonAssistant_navigation.xml • Location: `<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml` directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	`configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"`

8. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
9. Complete the following steps to update the **Help > About** page.
   a. Use the **configTool** utility to export the **Affinium \| Manager \| about** category.

      Note: The **Affinium \| Manager \| about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat  -x -p "Affinium|Manager|about" -f
      "C:\Unica\Platform\conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (`about.xml` in the example) to change the version number and display name.

      Find the `releaseNumber` property and change the value to the current version of Marketing Platform. Change the value of the `copyright` property to the appropriate copyright year. In the following example, change the release number from 9.1.1.0.0 to 11.0.1.0.0 and change the copyright to 2018.

      ```
      <property name="releaseNumber" type="string">
      <displayNameKey>about.releaseNumber</displayNameKey>
      <value>9.1.1.0.0.build_number</value>
      </property>
      </property>
      <property id="541" name="copyright" type="string_property" width="40">
      <value>2016</value>
      </property>
      ```

   c. Use the **configTool** utility to import the revised file.

      You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

      ```
      configTool.bat -vp -i -p "Affinium|Manager" -f "C:\Unica\Platform\
      conf\about.xml" -o
      ```

10. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 8. Upgrading from version 9.1.2 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM Marketing Software master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.

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d. Clear the **Run Platform configuration** check box.

e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 16. SQL scripts for upgrades from version 9.1.2

File details	File location
ManagerSchema_*DB_Type*_10upg.sql	db\upgrade912to10 directory under your Marketing Platform installation
*DB_Type*_QRTZ_Scheduler_10_upgrade_Script.sql	db\upgrade912to10 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager

7. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 17. Configuration properties for upgrades from version 9.1.2

File details	Example command
• File: APISecurity.xml • Location: conf\upgrade912to10 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API management** configuration node	configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\APISecurity.xml
• File: SAMLAuthentication.xml • Location: conf\upgrade912to10 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | SAML2.0** configuration node	configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\SAMLAuthentication.xml
• File: SAMLAuthenticationDetails.xml • Location: conf\upgrade912to10 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | Login method details | SAML 2.0** configuration nodes	configTool.bat -vp -p "Affinium|suite|security|loginModes" -f C:\Unica\Platform\conf\upgrade912to10\SAMLAuthenticationDetails.xml

Table 17. Configuration properties for upgrades from version 9.1.2 (continued)

File details	Example command
• File: `ExternalScheduler.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Scheduler | Scheduler registrations | IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite|scheduler| taskRegistrations" -f C:\Unica\Platform\conf\ upgrade912to10\ExternalScheduler.xml`
• File: `JWTAuthentication.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | JWT authentication** configuration node	`configTool.bat -vp -p "Affinium|suite|security" -f C:\Unica\Platform\conf\upgrade912to10\ JWTAuthentication.xml`
• File: `SecureSuiteStaticContent.xml` • Location: `conf\upgrade912to10` directory under your Marketing Platform installation • Purpose: Import the **Apply security on static content for all applications** property under the **IBM Marketing Platform** configuration node	`configTool.bat -vp -p "Affinium|suite" -f C:\Unica\Platform\conf\upgrade912to10\ SecureSuiteStaticContent.xml`
• File: `APISecurity_interactCollection.xml` • Location: `conf\upgrade10to1001` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	`configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml`
• File: `APISecurity_triggeredMessages.xml` • Location: `conf\upgrade10to1001` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	`configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml`
• File: `supportServer_config.xml` • Location: `conf\upgrade10to101` directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	`configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml`
• File: `cognos11_integration.xml` • Location: `conf\upgrade101to11` directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	`configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml`
• File: watsonAssistant_navigation.xml • Location: `<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml` directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	`configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"`

8. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
9. Complete the following steps to update the **Help > About** page.
   a. Use the **configTool** utility to export the **Affinium | Manager | about** category.

      Note: The **Affinium | Manager | about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat  -x -p "Affinium|Manager|about" -f
      "C:\Unica\Platform\conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (`about.xml` in the example) to change the version number and display name.

      Find the `releaseNumber` property and change the value to the current version of Marketing Platform. Change the value of the `copyright` property to the appropriate copyright year. In the following example, change the release number from 9.1.2.0.0 to 11.0.1.0.0 and change the copyright to 2018.

      ```
      <property name="releaseNumber" type="string">
      <displayNameKey>about.releaseNumber</displayNameKey>
      <value>9.1.2.0.0.build_number</value>
      </property>
      </property>
      <property id="541" name="copyright" type="string_property" width="40">
      <value>2016</value>
      </property>
      ```

   c. Use the **configTool** utility to import the revised file.

      You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

      ```
      configTool.bat -vp -i -p "Affinium|Manager" -f "about.xml" -o
      ```

10. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 9. Upgrading from version 10.0.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM Marketing Software master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.

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d. Clear the **Run Platform configuration** check box.

e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 18. SQL scripts for upgrades from version 10.0.0

File details	File location
ManagerSchema_*DB_Type*_10002upg.sql	db\upgrade10001to10002 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_101upg.sql	db\upgrade10002to101 directory under your Marketing Platform installation
ManagerSchema_*DB_Type*_11upg.sql	db\upgrade101to11 directory under your Marketing Platform installation

6. Use the populateDb utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The populateDb utility is in the tools\bin directory under your Marketing Platform installation. Example command: populateDb -n Manager

7. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 19. Configuration properties for upgrades from version 10.0.0

File details	Example command
• File: APISecurity_interactCollection.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_interactCollection.xml
• File: APISecurity_triggeredMessages.xml • Location: conf\upgrade10to1001 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Platform | Security | API Management | IBM Campaign** configuration node	configTool.bat -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <Platform_Home>\conf\upgrade10to1001\ APISecurity_triggeredMessages.xml
• File: supportServer_config.xml • Location: conf\upgrade10to101 directory under your Marketing Platform installation • Purpose: Import the **IBM Marketing Software** configuration nodes	configTool.bat -vp -p "Affinium" -f <Platform_Home>\conf\upgrade10to101\ supportServer_config.xml
• File: cognos11_integration.xml • Location: conf\upgrade101to11 directory under your Marketing Platform installation • Purpose: Import the **Affinium | Report | integrations | cognos11** configuration node	configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home>/conf/upgrade101to11/ cognos11_integration.xml

Table 19. Configuration properties for upgrades from version 10.0.0 (continued)

File details	Example command
• File: watsonAssistant_navigation.xml • Location: <PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"

8. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
9. Complete the following steps to update the **Help > About** page.
   a. Use the **configTool** utility to export the **Affinium | Manager | about** category.

      Note: The **Affinium | Manager | about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat -x -p "Affinium|Manager|about" -f "C:\Unica\Platform\
      conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (about.xml in the example) to change the version number and display name.

      Find the releaseNumber property and change the value to the current version of Marketing Platform. Change the value of the copyright property to the appropriate copyright year. In the following example, change the release number from 10.0.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

      ```
      <property name="releaseNumber" type="string">
      <displayNameKey>about.releaseNumber</displayNameKey>
      <value>10.0.0.0.0.build_number</value>
      </property>
      </property>
      <property id="541" name="copyright" type="string_property" width="40">
      <value>2016</value>
      </property>
      ```

   c. Use the **configTool** utility to import the revised file.

      You must use the -o option to overwrite the node. You must specify the parent node when you import. Example (Windows):

      ```
      configTool.bat -vp -i -p "Affinium|Manager" -f "about.xml" -o
      ```

10. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 10. Upgrading from version 10.1.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM Marketing Software master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.

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d. Clear the **Run Platform configuration** check box.

e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Run the following scripts against your system tables, where *DB_Type* is the database type.

Table 20. SQL scripts for upgrades from version 10.1.0

File details	File location
`ManagerSchema_DB_Type_11upg.sql`	`db\upgrade101to11` directory under your Marketing Platform installation

6. Use the `populateDb` utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The `populateDb` utility is in the `tools\bin` directory under your Marketing Platform installation. Example command: `populateDb -n Manager`

7. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 21. Configuration properties for upgrades from version 10.1.0

File details	Example command
• File: `cognos11_integration.xml` • Location: `conf\upgrade101to11` directory under your Marketing Platform installation • Purpose: Import the **Affinium** | **Report** | **integrations** | **cognos11** configuration node	`configTool.bat -vp -p "Affinium|Report|integrations" -f <Platform_Home/conf/upgrade101to11/ cognos11_integration.xml`
• File: watsonAssistant_navigation.xml • Location: `<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml` directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	`configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\ watsonAssistant_navigation.xml"`

8. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.

9. Complete the following steps to update the **Help > About** page.

   a. Use the **configTool** utility to export the **Affinium** \| **Manager** \| **about** category.

      Note: The **Affinium** \| **Manager** \| **about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat -x -p "Affinium|Manager|about" -f "C:\Unica\Platform\ conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (`about.xml` in the example) to change the version number and display name.

Find the `releaseNumber` property and change the value to the current version of Marketing Platform. Change the value of the `copyright` property to the appropriate copyright year. In the following example, change the release number from 10.1.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

```
<property name="releaseNumber" type="string">
<displayNameKey>about.releaseNumber</displayNameKey>
<value>10.1.0.0.0.build_number</value>
</property>
</property>
<property id="541" name="copyright" type="string_property" width="40">
<value>2016</value>
</property>
```

c. Use the **configTool** utility to import the revised file.

   You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

   ```
   configTool.bat -vp -i -p "Affinium|Manager" -f "about.xml" -o
   ```

10. Deploy and verify your installation as described in the Chapter 12, "Deploying Marketing Platform," on page 61.

Chapter 11. Upgrading from version 11.0.0 with manual migration

The Marketing Platform upgrade installer can perform all of the data migration that is required for an upgrade automatically. However, if the policy of your organization does not allow automatic migration, you must complete the migration procedure to upgrade Marketing Platform manually.

Ensure that you have the following installers in the same directory.

- The IBM Marketing Software master installer
- The Marketing Platform installer

To upgrade to Marketing Platform version 11.0.1 manually, you must run SQL scripts and run some command line utilities to populate the system tables. Ensure that your installation of Marketing Platform is fully functional so that you can run the utilities. Complete information about using these utilities, including example commands for common tasks, is available in the following topics.

- "populateDb" on page 78
- "configTool" on page 70

The utilities are in the `tools\bin` directory under your Marketing Platform installation.

See "Marketing Platform upgrade scenarios" on page 13 for information about upgrading from other versions.

1. Create a back-up copy of your Marketing Platform system table database.

   Important: Do not skip this step. If the upgrade operation fails, you cannot roll back your database and your data is corrupted.
2. Undeploy your Marketing Platform deployment.
3. Run the IBM Marketing Software master installer. The IBM Marketing Software master installer starts. Use the following instructions after theIBM Marketing Software master installer starts.
   - When the IBM Marketing Software master installer prompts you to choose an installation directory, choose the root installation directory, not the Marketing Platform installation directory that is under this root directory.
   - When the IBM Marketing Software master installer prompts you to enter Marketing Platform database connection information, enter the information that pertains to your current Marketing Platform system tables.

   The IBM Marketing Software master installer pauses and starts the Marketing Platform installer.
4. Complete the following steps while the Marketing Platform installer is running.
   a. When the Marketing Platform installer prompts you for an installation directory, select the directory of your current Marketing Platform installation, usually named `Platform`.
   b. Allow the installer to create a back-up copy of your previous installation of Marketing Platform.
   c. Select **Manual database setup**.
   d. Clear the **Run Platform configuration** check box.

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e. Follow the remaining steps in the installation wizard and enter the requested information.

5. Use the `populateDb` utility to populate the system tables with default Marketing Platform configuration properties, users and groups, and security roles and permissions.

   The `populateDb` utility is in the `tools\bin` directory under your Marketing Platform installation. Example command: `populateDb -n Manager`

6. Use the configTool utility to import configuration properties as described below.

   Important: Perform the imports in the order shown in the following table.

Table 22. Configuration properties for upgrades from version 10.1.0

File details	Example command
• File: watsonAssistant_navigation.xml • Location: `<PLATFORM_HOME>\conf\watsonAssistant_navigation.xml` directory under your Marketing Platform installation • Purpose: Import the Affinium | suite | uiNavigation | mainMenu | Analytics | Watson Assistantconfiguration node configuration node	`configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f "<PLATFORM_HOME>\conf\watsonAssistant_navigation.xml"`

7. After you have imported the configuration properties in the previous step, restart the web application server on which Marketing Platform is deployed so the changes are applied.
8. Complete the following steps to update the **Help > About** page.
   a. Use the **configTool** utility to export the **Affinium | Manager | about** category.

      Note: The **Affinium | Manager | about** category is not visible on the Configuration page because it is marked hidden.
      Example (Windows):

      ```
      configTool.bat -x -p "Affinium|Manager|about" -f "C:\Unica\Platform\conf\about.xml"
      ```

   b. Edit the exported XML file that you just created (`about.xml` in the example) to change the version number and display name.

      Find the `releaseNumber` property and change the value to the current version of Marketing Platform. Change the value of the `copyright` property to the appropriate copyright year. As in the following example, change the release number from 11.0.0.0.0 to 11.0.1.0.0 and change the copyright to 2018.

      ```
      <property name="releaseNumber" type="string">
      <displayNameKey>about.releaseNumber</displayNameKey>
      <value>11.0.0.0.0.build_number</value>
      </property>
      </property>
      <property id="541" name="copyright" type="string_property" width="40">
      <value>2016</value>
      </property>
      ```

   c. Use the **configTool** utility to import the revised file.

      You must use the `-o` option to overwrite the node. You must specify the parent node when you import. Example (Windows):

      ```
      configTool.bat -vp -i -p "Affinium|Manager" -f "about.xml" -o
      ```

9. Deploy and verify your installation as described in the Chapter 12, “Deploying Marketing Platform,” on page 61.

Chapter 12. Deploying Marketing Platform

You must follow a set of guidelines when you deploy Marketing Platform in your web application server. There is a different set of guidelines for deploying Marketing Platform on WebLogic and on WebSphere.

When you ran the IBM installer, you completed one of the following actions:

- You included Marketing Platform in an EAR file.
- You created the WAR file of Marketing Platform (`unica.war`).

If you included other products in an EAR file, you must follow the deployment guidelines that are provided in the individual installation guides for the products that are included in the EAR file.

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

Guidelines for deploying Marketing Platform on WebLogic

You must follow a set of guidelines when you deploy Marketing Platform on the WebLogic application.

Use the following guidelines when you deploy the Marketing Platform products on any supported version of WebLogic:

- IBM Marketing Software products customize the Java virtual machine (JVM) that is used by WebLogic. If you encounter errors related to JVM, you can create a WebLogic instance that is dedicated to IBM Marketing Software products.
- Open the `startWebLogic.cmd` file and verify that the SDK that is selected for the WebLogic domain that you are using is the Sun SDK for the **JAVA_VENDOR** variable.

  The **JAVA_VENDOR** variable must be set to `Sun` (**JAVA_VENDOR=Sun**). If the**JAVA_VENDOR** variable is set to **JAVA_VENDOR**, it means that JRockit is selected. You must change the selected SDK, because JRockit is not supported. Refer to the BEA WebLogic documentation to change the selected SDK.
- Deploy Marketing Platform as a web application.
- If you are configuring WebLogic to use the IIS plug-in, review the BEA WebLogic documentation.
- Complete the following tasks if your installation must support non-ASCII characters, for example for Portuguese or for locales that require multi-byte characters:
  1. Edit the **setDomainEnv** script in the `bin` directory under your WebLogic domain directory to add `-Dfile.encoding=UTF-8` to **JAVA_VENDOR**.
  2. In the WebLogic console, click the **Domain** link on the home page.
  3. In the **Web Applications** tab, select the **Archived Real Path Enabled** check box.
  4. Restart WebLogic.
  5. Deploy and start the EAR file or the `unica.war` file.
- If deploying in a production environment, set the JVM memory heap size parameters to 1024 by adding the following line to the setDomainEnv script:

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```
Set MEM_ARGS=-Xms1024m -Xmx1024m -XX:MaxPermSize=256m
```

Guidelines for deploying Marketing Platform on WebSphere

You must follow a set of guidelines when you deploy Marketing Platform on Websphere.

Make sure that the version of WebSphere meets the requirements that are described in the *IBM Enterprise Products Recommended Software Environments and Minimum System Requirements* document, including any necessary fix packs. Use the following guidelines when you deploy Marketing Platform on WebSphere:

- Specify the following custom property in the server:
  - Name: `com.ibm.ws.webcontainer.invokefilterscompatibility`
  - Value: `true`
- See http://www-01.ibm.com/support/docview.wss?uid=swg21284395 for instructions on setting a custom property in WebSphere.
- Deploy the IBM EAR file or `unica.war` file as an enterprise application. When you deploy the EAR file or the `unica.war` file, ensure that the JDK source level of the JSP compiler is set to Java 17, and that JSP pages are precompiled according to the following information:
  - In the form where you browse to and select the WAR file, select **Show me all installation options and parameters** so the **Select Installation Options** wizard runs.
  - In step 1 of the **Select Installation Options** wizard, select **Precompile JavaServer Pages files**.
  - In step 3 of the **Select Installation Options** wizard, ensure that the **JDK Source Level** is set to 17.

    If you deployed an EAR, set the JDK Source Level for each WAR file.
  - In step 8 of the **Select Installation Options** wizard, select **UnicaPlatformDS** as the matching Target Resource.
  - In step 10 of the **Select Installation Options** wizard, the context root must be set to `/unica`, all lower case.
- In the **Web Container Settings > Web Container > Session Management** section of the server, enable cookies. Specify a different session cookie name for each application that is deployed. Use one of the following procedures to specify a cookie name:
  - Select the **Override session management** check box under **Session Management**.

    If you deployed separate WAR files for your IBM Marketing Software products, in the WebSphere console, in the **Applications > Enterprise Applications > [deployed_application] > Session Management > Enable Cookies > Cookie Name** section of the server, specify a unique session cookie name.

    If you deployed EAR files for your IBM Marketing Software products, in the WebSphere console, in the **Applications > Enterprise Applications > [deployed_application] > Module Management > [deployed_module] > Session Management > Enable Cookies > Cookie Name** section of the server, specify a unique session cookie name.
  - If your installation must support non-ASCII characters, for example for Portuguese or for locales that require multi-byte characters, add the following arguments to **Generic JVM Arguments** at the server level:

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

-Dclient.encoding.override=UTF-8

Navigation tip: Select **Servers > Application Servers > Java and Process Management > Process Definition > Java Virtual Machine > Generic JVM Arguments**. See the WebSphere documentation for additional details.

- In the **Applications > Enterprise Applications** section of the server, select the EAR file or WAR file that you deployed, then select **Class loading and update detection** and specify the following properties.
  - If you are deploying a WAR file:
    - For **Class loader order**, select **Classes loaded with local class loader first (parent last)**.
    - For **WAR class loader policy**, select **Single class loader for application**.
  - If you are deploying an EAR file:
    - For **Class loader order**, select **Classes loaded with local class loader first (parent last)**.
    - For **WAR class loader policy**, select **Class loader for each WAR file in application**.
- Start your deployment. If your instance of WebSphere is configured to use a JVM version 1.7 or newer, complete the following steps to work around an issue with the time zone database.
  1. Stop WebSphere.
  2. Download the IBM Time Zone Update Utility for Java (JTZU) from the IBM web site:

     http://www.ibm.com/developerworks/java/jdk/dst/index.html
  3. Follow the steps provided by the IBM (JTZU) to update the time zone data in your JVM.
  4. Restart WebSphere.
- In Websphere Enterprise Applications, select ***Your Application*** **> Manage Modules >** ***Your Application*** **> Class Loader Order > Classes loaded with local class loader first (parent last)**.
- The recommended minimum heap size for the basic functioning of the application is 512, and the recommended maximum heap size is 1024.

  Complete the following tasks to specify the heap size:
  1. In WebSphere Enterprise Applications, select **Servers > WebSphere application servers > server1 > Server Infrastructure > Java and Process Management > Process definition > Java Virtual Machine**.
  2. Set the initial heap size to 512.
  3. Set the maximum heap size to 1024

  See the WebSphere documentation for more information about sizing.

Verifying your Marketing Platform installation

After you install and deploy Marketing Platform, you must verify that there are no errors in your Marketing Platform installation and deployment. You can configure your Marketing Platform installation after the verification.

Complete the following tasks to verify your Marketing Platform installation:

1. Access the IBM Marketing Software URL in a supported web browser.

   If you entered a domain when you installed Marketing Platform, the URL is the following, where *host* is the machine where Marketing Platform is installed,

domain.com is the domain in which the host machine resides, and *port* is the port number on which the web application server listens.

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

2. Log in using the default administrator login, which is `asm_admin` with `password` as the password.

   You will be asked to change the password. You can enter the existing password, but for good security you should choose a new one.

   The default home page is the dashboard, which you will configure later.
3. Under the **Settings** menu, check the Users, User Groups, and User Permissions pages to verify that the pre-configured users, groups, roles, and permissions are present, as described in the *Marketing Platform Administrator's Guide*.
4. Add a new user and group and verify that data is entered into the Marketing Platform system table database.
5. Under the **Settings** menu, check the Configuration page to verify that the Marketing Platform configuration properties exist.

There are additional configuration tasks, such as configuring the dashboard, setting up user access to IBM applications, and integrating with an LDAP or web access control system (optional). See the *IBM Marketing Platform Administrator's Guide* for instructions.

Chapter 13. Configuring Marketing Platform after deployment

For a basic installation of Marketing Platform, you must configure Marketing Platform after deployment if you use the IBM Marketing Software reporting feature, or if you want to use a password policy.

If you use the IBM Marketing Software reporting feature, see the *IBM Marketing Software Reports Installation and Configuration Guide*. If you want to use a password policy in mind, see "Default password settings" to determine whether you must change the default password settings.

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

Additional configuration required for SSL environments

From the 10.0 release onwards, SSL for C++ components in IBM Marketing Software products is supported by GSKit rather than OpenSSL.

If you have implemented SSL for C++ components (such as the Campaign listener and Contact Optimization server) in the pre-10.0 version of IBM Marketing Software products, you must do the following for these components.

- Create a GSKit key store (.kdb file).
- Create new certificates using GSKit.
- Add your new certificates (and Root certificates if any) to this GSKit keystore.
- Configure your environment to use the new certificates.

For details, see the *IBM Marketing Platform Administrator's Guide* , Chapter 14: Implementation of one-way SSL.

Default password settings

IBM Marketing Software provides default settings for using passwords. However, you can use the **General > Password settings** category on the IBM Marketing Software Configuration page to change the default settings, and create your password policies.

The default password settings apply to passwords for users that are created within IBM Marketing Software. The settings do not apply to the users that are imported through synchronization with an external system, such as Windows Active Directory, a supported LDAP directory server, or web access control server. The exception is the `Maximum failed login attempts allowed` setting, which affects both internal and external users. Also note that this property does not override any similar restriction set in an external system.

The following settings are the default password settings that IBM Marketing Software:

- `Maximum failed login attempts allowed` - 3
- `Password history count` - 0

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- Validity (in days) - 30
- Blank passwords allowed - True
- Allow identical user name and password - True
- Minimum number of numeric characters - 0
- Minimum number of letter characters - 0
- Minimum character length - 4

See the online help for descriptions of the default settings.

Chapter 14. Marketing Platform utilities

This section provides an overview of the Marketing Platform utilities, including some details that apply to all of the utilities and which are not included in the individual utility descriptions.

Location of utilities

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

List and descriptions of utilities

The Marketing Platform provides the following utilities.

- "alertConfigTool" on page 69 - registers alerts and configurations for IBM Marketing Software products
- "configTool" on page 70 - imports, exports, and deletes configuration settings, including product registrations
- "datafilteringScriptTool" on page 74 - creates data filters
- "encryptPasswords" on page 75 - encrypts and stores passwords
- "partitionTool" on page 76 - creates database entries for partitions
- "populateDb" on page 78 - populates the Marketing Platform database
- "restoreAccess" on page 79 - restores a user with the platformAdminRole role
- "scheduler_console_client" on page 80 - lists or starts IBM Marketing Software Scheduler jobs that are configured to listen for a trigger.

Prerequisites for running Marketing Platform utilities

The following are prerequisites for running all Marketing Platform utilities.

- Run all utilities from the directory where they are located (by default, the `tools/bin` directory under your Marketing Platform installation).
- On UNIX, the best practice is to run the utilities with the same user account that runs the application server on which Marketing Platform is deployed. If you run a utility with a different user account, adjust the permissions on the `platform.log` file to allow that user account to write to it. If you do not adjust permissions, the utility is not able to write to the log file and you might see some error messages, although the tool should still function correctly.

Authentication of utilities

Utilities such as `configTool` and other IBM Marketing Software back end utilities are designed to be used by system administrators and require physical access to the host servers for them to be invoked. For this reason, authentication for these utilities has been designed to be independent of the UI authentication mechanism. Access to these utilities is available to users with Marketing Platform administrator privileges. Access to these utilities is expected to be locally defined in Marketing Platform and authenticated against the same.

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Troubleshooting connection issues

All of the Marketing Platform utilities except `encryptPasswords` interact with the Marketing Platform system tables. To connect to the system table database, these utilities use the following connection information, which is set by the installer using information provided when the Marketing Platform was installed. This information is stored in the `jdbc.properties` file, located in the `tools/bin` directory under your Marketing Platform installation.

- JDBC driver name
- JDBC connection URL (which includes the host, port, and database name)
- Data source login
- Data source password (encrypted)

In addition, these utilities rely on the `JAVA_HOME` environment variable, set either in the `setenv` script located in the `tools/bin` directory of your Marketing Platform installation, or on the command line. The Marketing Platform installer should have set this variable automatically in the `setenv` script, but it is a good practice to verify that the `JAVA_HOME` variable is set if you have a problem running a utility. The JDK must be the Sun version (not, for example, the JRockit JDK available with WebLogic).

Special characters

Characters that are designated as reserved characters in the operating system must be escaped. Consult your operating system documentation for a list of reserved characters and how to escape them.

Standard options in Marketing Platform utilities

The following options are available in all Marketing Platform utilities.

`-l logLevel`

Set the level of log information displayed in the console. Options are `high`, `medium`, and `low`. The default is `low`.

`-L`

Set the locale for console messages. The default locale is en_US. The available option values are determined by the languages into which the Marketing Platform has been translated. Specify the locale using the ICU locale ID according to ISO 639-1 and ISO 3166.

`-h`

Display a brief usage message in the console.

`-m`

Display the manual page for this utility in the console.

`-v`

Display more execution details in the console.

Setting up Marketing Platform utilities on additional machines

On the machine where the Marketing Platform is installed, you can run the Marketing Platform utilities without any additional configuration. However, you might want to run the utilities from another machine on the network. This procedure describes the steps required to do this.

Ensure that the machine on which you perform this procedure meets the following prerequisites.

- The correct JDBC driver must exist on the machine or be accessible from it.
- The machine must have network access to the Marketing Platform system tables.
- The Java runtime environment must be installed on the machine or be accessible from it.

1. Gather the following information about the Marketing Platform system tables.
   - The fully qualified path for the JDBC driver file or files on your system.
   - The fully qualified path to an installation of the Java runtime environment.

     The default value in the installer is the path to the supported version of the JRE that the installer places under your IBM Marketing Software installation directory. You can accept this default or specify a different path.
   - Database type
   - Database host
   - Database port
   - Database name/system ID
   - Database user name
   - Database password
2. Run the IBM Marketing Software installer and install the Marketing Platform.

   Enter the database connection information that you gathered for the Marketing Platform system tables. If you are not familiar with the IBM Marketing Software installer, see the Campaign or Marketing Operations installation guide.

   You do not have to deploy the Marketing Platform web application if you are installing the utilities only.

Marketing Platform utilities

This section describes the Marketing Platform utilities, with functional details, syntax, and examples.

alertConfigTool

Notification types are specific to the various IBM Marketing Software products. Use the `alertConfigTool` utility to register the notification types when the installer has not done this automatically during installation or upgrade.

Syntax

`alertConfigTool -i -f` *`importFile`*

Commands

-i -f *importFile*

Import alert and notification types from a specified XML file.

Example

- Import alert and notification types from a file named `Platform_alerts_configuration.xml` located in the `tools\bin` directory under the Marketing Platform installation.

  ```
  alertConfigTool -i -f Platform_alerts_configuration.xml
  ```

configTool

The properties and values on the Configuration page are stored in the Marketing Platform system tables. You can use the `configTool` utility to import and export configuration settings to and from the system tables.

When to use configTool

You might want to use `configTool` for the following reasons.

- To import partition and data source templates that are supplied with Campaign, which you can then modify and duplicate by using the Configuration page.
- To register (import configuration properties for) IBM Marketing Software products, if the product installer is unable to add the properties to the database automatically.
- To export an XML version of configuration settings for backup or to import into a different installation of IBM Marketing Software.
- To delete categories that do not have the **Delete Category** link. You do this by using `configTool` to export your configuration, then manually deleting the XML that creates the category, and by using `configTool` to import the edited XML.

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

Syntax

```
configTool -d -p "elementPath" [-o]

configTool -i -p "parent ElementPath" -f importFile [-o]

configTool -x -p "elementPath" -f exportFile

configTool -vp -p "elementPath" -f importFile [-d]

configTool -r productName -f registrationFile [-o] configTool -u
productName
```

Commands

-d -p "*elementPath*" [o]

Delete configuration properties and their settings, specifying a path in the configuration property hierarchy.

The element path must use the internal names of categories and properties. You can obtain them by going to the Configuration page, selecting the wanted category or property, and looking at the path that is displayed in parentheses in the right pane. Delimit a path in the configuration property hierarchy by using the | character, and surround the path with double quotation marks.

Note the following.

- Only categories and properties within an application can be deleted by using this command, not whole applications. Use the `-u` command to unregister a whole application.
- To delete categories that do not have the **Delete Category** link on the Configuration page, use the `-o` option.

When you use `-d` with the `-vp` command, the configTool deletes any child nodes in the path you specify if those nodes are not included in the XML file you specify.

`-i -p "`*`parentElementPath`*`" -f `*`importFile`*` [o]`

Import configuration properties and their settings from a specified XML file.

To import, you specify a path to the parent element under which you want to import your categories. The `configTool` utility imports properties under the category you specify in the path.

You can add categories at any level below the top level, but you cannot add a category at same level as the top category.

The parent element path must use the internal names of categories and properties. You can obtain them by going to the Configuration page, selecting the required category or property, and looking at the path that is displayed in parentheses in the right pane. Delimit a path in the configuration property hierarchy by using the | character, and surround the path with double quotation marks.

You can specify an import file location relative to the `tools/bin` directory or you can specify a full directory path. If you specify a relative path or no path, `configTool` first looks for the file relative to the `tools/bin` directory.

By default, this command does not overwrite an existing category, but you can use the `-o` option to force an overwrite.

`-x -p "`*`elementPath`*`" -f `*`exportFile`*

Export configuration properties and their settings to an XML file with a specified name.

You can export all configuration properties or limit the export to a specific category by specifying a path in the configuration property hierarchy.

The element path must use the internal names of categories and properties, which you can obtain by going to the Configuration page, selecting the wanted category or property, and looking at the path that is displayed in parentheses in the right

pane. Delimit a path in the configuration property hierarchy by using the | character, and surround the path with double quotation marks.

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

-vp -p "*elementPath*" -f *importFile* [-d]

This command is used mainly in manual upgrades, to import configuration properties. If you applied a fix pack that contains a new configuration property, and you then upgrade, importing a configuration file as part of a manual upgrade process can override values that were set when the fix pack was applied. The `-vp` command ensures that the import does not override previously set configuration values.

Important: After you use the `configTool` utility with the -vp option, you must restart the web application server on which Marketing Platform is deployed so the changes are applied.

When you use `-d` with the `-vp` command, the configTool deletes any child nodes in the path you specify if those nodes are not included in the XML file you specify.

-r *productName* -f *registrationFile*

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

Note the following.

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

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

The `configTool` utility uses product names as parameters with the commands that register and unregister products. With the 8.5.0 release of IBM Marketing Software, many product names changed. However, the names that are recognized by `configTool` did not change. The valid product names for use with `configTool` are listed below, along with the current names of the products.

Table 23. Product names for configTool registration and unregistration

Product name	Name used in configTool
Marketing Platform	`Manager`
Campaign	`Campaign`
Distributed Marketing	`Collaborate`
eMessage	`emessage`
Interact	`interact`
Contact Optimization	`Optimize`
Marketing Operations	`Plan`
Opportunity Detect	`Detect`
IBM SPSS Modeler Advantage Enterprise Marketing Management Edition	`SPSS`
Digital Analytics	`Coremetrics`

-u *productName*

Unregister an application that is specified by *productName*. You do not have to include a path to the product category; the product name is sufficient, and it is required. The process removes all properties and configuration settings for the product.

Options

-o

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

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

Examples

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

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

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

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

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

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

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

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

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

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

- Unregister an application named productName.

  ```
  configTool -u productName
  ```

datafilteringScriptTool

The datafilteringScriptTool utility reads an XML file to populate the data filtering tables in the Marketing Platform system table database.

Depending on how you write the XML, you can use this utility in two ways.

- Using one set of XML elements, you can auto-generate data filters based on unique combinations of field values (one data filter for each unique combination).
- Using a slightly different set of XML elements, you can specify each data filter that the utility creates.

See *IBM Marketing Platform the Administrator's Guide* for information about creating the XML.

When to use datafilteringScriptTool

You must use datafilteringScriptTool when you create new data filters.

Prerequisites

The Marketing Platform must be deployed and running.

Using datafilteringScriptTool with SSL

When the Marketing Platform is deployed using one-way SSL you must modify the datafilteringScriptTool script to add the SSL options that perform handshaking. To modify the script, you must have the following information.

- Truststore file name and path
- Truststore password

In a text editor, open the datafilteringScriptTool script (.bat or .sh) and find the lines that look like this (examples are Windows version).

```
:callexec

"%JAVA_HOME%\bin\java" -DUNICA_PLATFORM_HOME="%UNICA_PLATFORM_HOME%"

com.unica.management.client.datafiltering.tool.DataFilteringScriptTool %*
```

Edit these lines to look like this (new text is in **bold**). Substitute your truststore path and file name and truststore password for myTrustStore.jks and myPassword.

```
:callexec

SET SSL_OPTIONS=-Djavax.net.ssl.keyStoreType="JKS"

-Djavax.net.ssl.trustStore="C:\security\myTrustStore.jks"
```

```
-Djavax.net.ssl.trustStorePassword=myPassword

"%JAVA_HOME%\bin\java" -DUNICA_PLATFORM_HOME="%UNICA_PLATFORM_HOME%"
%SSL_OPTIONS%

com.unica.management.client.datafiltering.tool.DataFilteringScriptTool %*
```

Syntax

```
datafilteringScriptTool -r pathfile
```

Commands

-r *path*_file

Import data filter specifications from a specified XML file. If the file is not located in the tools/bin directory under your installation, provide a path and enclose the *path*_file parameter in double quotation marks.

Example

- Use a file named collaborateDataFilters.xml, located in the C:\unica\xml directory, to populate the data filter system tables.

  ```
  datafilteringScriptTool -r "C:\unica\xml\collaborateDataFilters.xml"
  ```

encryptPasswords

The encryptPasswords utility is used to encrypt and store either of two passwords that Marketing Platform uses internally.

The two passwords that the utility can encrypt are as follows.

- The password that the Marketing Platform uses to access its system tables. The utility replaces an existing encrypted password (stored in the jdbc,properties file, located in the tools\bin directory under your Marketing Platform installation) with a new one.
- The keystore password used by the Marketing Platform when it is configured to use SSL with a certificate other than the default one supplied with the Marketing Platform or the web application server. The certificate can be either a self-signed certificate or a certificate from a certificate authority.

When to use encryptPasswords

Use encryptPasswords as for the following reasons.

- When you change the password of the account used to access your Marketing Platform system table database.
- When you have created a self-signed certificate or have obtained one from a certificate authority.

Prerequisites

- Before running encryptPasswords to encrypt and store a new database password, make a backup copy of the jdbc.properties file, located in the tools/bin directory under your Marketing Platform installation.
- Before running encryptPasswords to encrypt and store the keystore password, you must have created or obtained a digital certificate and know the keystore password.

Syntax

```
encryptPasswords -d databasePassword

encryptPasswords -k keystorePassword
```

Commands

-d *databasePassword*

Encrypt the database password.

-k *keystorePassword*

Encrypt the keystore password and store it in a file named `pfile`.

Examples

- When the Marketing Platformwas installed, the login for the system table database account was set to `myLogin`. Now, some time after installation, you have changed the password for this account to `newPassword`. Run `encryptPasswords` as follows to encrypt and store the database password.

  ```
  encryptPasswords -d newPassword
  ```

- You are configuring an IBM Marketing Software application to use SSL and have created or obtained a digital certificate. Run `encryptPasswords` as follows to encrypt and store the keystore password.

  ```
  encryptPasswords -k myPassword
  ```

partitionTool

Partitions are associated with Campaign policies and roles. These policies and roles and their partition associations are stored in the Marketing Platform system tables. The `partitionTool` utility seeds the Marketing Platform system tables with basic policy and role information for partitions.

When to use partitionTool

For each partition you create, you must use `partitionTool` to seed the Marketing Platform system tables with basic policy and role information.

See the installation guide appropriate for your version of Campaign for detailed instructions on setting up multiple partitions in Campaign.

Special characters and spaces

Any partition description or user, group, or partition name that contains spaces must be enclosed in double quotation marks.

Syntax

```
partitionTool -c -s sourcePartition -n newPartitionName [-u
admin_user_name] [-d partitionDescription] [-g groupName]
```

Commands

The following commands are available in the `partitionTool` utility.

`-c`

Replicates (clones) the policies and roles for an existing partition specified using the `-s` option, and uses the name specified using the `-n` option. Both of these options are required with `c`. This command does the following.

- Creates a new IBM Marketing Software user with the Admin role in both the Administrative Roles policy and the global policy in Campaign. The partition name you specify is automatically set as this user's password.
- Creates a new Marketing Platform group and makes the new Admin user a member of that group.
- Creates a new partition object.
- Replicates all the policies associated with the source partition and associates them with the new partition.
- For each replicated policy, replicates all roles associated with the policy.
- For each replicated role, maps all functions in the same way that they were mapped in the source role.
- Assigns the new Marketing Platform group to the last system-defined Admin role created during role replication. If you are cloning the default partition, partition1, this role is the default Administrative Role (Admin).

Options

`-d` ***`partitionDescription`***

Optional, used with `-c` only. Specifies a description that appears in the output from the `-list` command. Must be 256 characters or less. Enclose in double quotation marks if the description contains spaces.

`-g` ***`groupName`***

Optional, used with `-c` only. Specifies the name of the Marketing Platform Admin group that the utility creates. The name must be unique within this instance of Marketing Platform

If not defined, the name defaults to `partition_nameAdminGroup`.

`-n` ***`partitionName`***

Optional with `-list`, required with `-c`. Must be 32 characters or less.

When used with `-list`, specifies the partition whose information is listed.

When used with `-c`, specifies the name of the new partition, and the partition name you specify is used as the password for the Admin user. The partition name must match the name you gave the partition in when you configured it (using the partition template on the Configuration page).

`-s` ***`sourcePartition`***

Required, used with `-c` only. The name of the source partition to be replicated.

-u *adminUserName*

Optional, used with -c only. Specifies the user name of the Admin user for the replicated partition. The name must be unique within this instance of Marketing Platform.

If not defined, the name defaults to *partitionName*AdminUser.

The partition name is automatically set as this user's password.

Examples

- Create a partition with the following characteristics.
  - Cloned from partition1
  - Partition name is myPartition
  - Uses the default user name (myPartitionAdminUser) and password (myPartition)
  - Uses the default group name (myPartitionAdminGroup)
  - Description is "ClonedFromPartition1"

  ```
  partitionTool -c -s partition1 -n myPartition -d "ClonedFromPartition1"
  ```
- Create a partition with the following characteristics.
  - Cloned from partition1
  - Partition name is partition2
  - Specifies user name of customerA with the automatically assigned password of partition2
  - Specifies group name of customerAGroup
  - Description is "PartitionForCustomerAGroup"

  ```
  partitionTool -c -s partition1 -n partition2 -u customerA -g
  customerAGroup -d "PartitionForCustomerAGroup"
  ```

populateDb

The populateDb utility inserts default (seed) data in the Marketing Platform system tables.

The IBM Marketing Software installer can populate the Marketing Platform system tables with default data for Marketing Platform and for Campaign. However, if your company policy does not permit the installer to change the database, or if the installer is unable to connect with the Marketing Platform system tables, you must insert default data in the Marketing Platform system tables using this utility.

For Campaign, this data includes security roles and permissions for the default partition. For Marketing Platform, this data includes default users and groups, and security roles and permissions for the default partition.

Syntax

```
populateDb -n productName
```

Commands

-n *productName*

Insert default data into the Marketing Platform system tables. Valid product names are `Manager` (for Marketing Platform) and `Campaign` (for Campaign).

Examples

- Insert Marketing Platform default data manually.

  ```
  populateDb -n Manager
  ```

- Insert Campaign default data manually.

  ```
  populateDb -n Campaign
  ```

restoreAccess

The `restoreAccess` utility allows you to restore access to Marketing Platform if all users with PlatformAdminRole privileges have been inadvertently locked out or if all ability to log in to the Marketing Platform has been lost.

When to use restoreAccess

You might want to use `restoreAccess` under the two circumstances described in this section.

PlatformAdminRole users disabled

It is possible that all users with PlatformAdminRole privileges in Marketing Platform might become disabled in the system. Here is an example of how the platform_admin user account might become disabled. Suppose you have only one user with PlatformAdminRole privileges (the platform_admin user). Assume the `Maximum failed login attempts allowed` property in the **General | Password settings** category on the Configuration page is set to 3. Then suppose someone who is attempting to log in as platform_admin enters an incorrect password three times in a row. These failed login attempts cause the platform_admin account to become disabled in the system.

In that case, you can use `restoreAccess` to add a user with PlatformAdminRole privileges to the Marketing Platform system tables without accessing the web interface.

When you run `restoreAccess` in this way, the utility creates a user with the login name and password you specify, and with PlatformAdminRole privileges.

If the user login name you specify exists in Marketing Platform as an internal user, that user's password is changed.

Only a user with the login name of PlatformAdmin and with PlatformAdminRole privileges can universally administer all dashboards. So if the platform_admin user is disabled and you create a user with `restoreAccess`, you should create a user with a login of platform_admin.

Improper configuration of NTLMv2 authentication

If you implement NTLMv2 authentication with improper configuration and can no longer log in, use `restoreAccess` to restore the ability to log in.

When you run `restoreAccess` in this way, the utility changes the value of the `Platform | Security | Login method` property to `Marketing Platform`. This change allows you to log in with any user account that existed before you were locked

out. You can optionally specify a new login name and password as well. You must restart the web application server on which Marketing Platform is deployed if you use the `restoreAccess` utility in this way.

Password considerations

Note the following about passwords when you use `restoreAccess`.

- The `restoreAccess` utility does not support blank passwords, and does not enforce password rules.
- If you specify a user name that is in use, the utility resets the password for that user.

Syntax

```
restoreAccess -u loginName -p password

restoreAccess -r
```

Commands

-r

When used without the `-u` *loginName* option, reset the value of the `Platform | Security | Login method` property to `Marketing Platform`. Requires restart of the web application server to take effect.

When used with the `-u` *loginName* option, create a PlatformAdminRole user.

Options

-u *loginNname*

Create a user with PlatformAdminRole privileges with the specified login name. Must be used with the `-p` option.

-p *password*

Specify the password for the user being created. Required with `-u`.

Examples

- Create a user with PlatformAdminRole privileges. The login name is `tempUser` and the password is `tempPassword`.

  ```
  restoreAccess -u tempUser -p tempPassword
  ```

- Change the value of the login method to `IBM Marketing Platform` and create a user with PlatformAdminRole privileges. The login name is `tempUser` and the password is `tempPassword`.

  ```
  restoreAccess -r -u tempUser -p tempPassword
  ```

scheduler_console_client

Jobs configured in the IBM Marketing Software Scheduler can be listed and kicked off by this utility, if they are set up to listen for a trigger.

What to do if SSL is enabled

When the Marketing Platform web application is configured to use SSL, the JVM used by the `scheduler_console_client` utility must use the same SSL certificate that is used by the web application server on which the Marketing Platform is deployed.

Take the following steps to import the SSL certificate

- Determine the location of the JRE used by the `scheduler_console_client`.
  - If `JAVA_HOME` is set as a system environment variable, the JRE it points to is the one used by the `scheduler_console_client` utility.
  - If `JAVA_HOME` is not set as a system environment variable, the `scheduler_console_client` utility uses the JRE set either in the `setenv` script located in the `tools/bin` directory of your Marketing Platform installation, or on the command line.
- Import the SSL certificate used by the web application server on which the Marketing Platform is deployed to the JRE used by `scheduler_console_client`.

  The Sun JDK includes a program called `keytool` that you can use to import the certificate. Consult the Java documentation for complete details on using this program, or access the help by entering `-help` when you run the program.
- Open the `tools/bin/schedulerconsoleclient` file in a text editor and add the following properties. These differ depending on the web application server on which Marketing Platform is deployed.
  - For WebSphere, add these properties to the file.

    -Djavax.net.ssl.keyStoreType=JKS

    -Djavax.net.ssl.keyStore="*Path to your key store JKS file*"

    -Djavax.net.ssl.keyStorePassword="*Your key store password*"

    -Djavax.net.ssl.trustStore="*Path to your trust store JKS file*"

    -Djavax.net.ssl.trustStorePassword="*Your trust store password*"

    -DisUseIBMSSLSocketFactory=false
  - For WebLogic, add these properties to the file.

    -Djavax.net.ssl.keyStoreType="JKS"

    -Djavax.net.ssl.trustStore="*Path to your trust store JKS file*"

    -Djavax.net.ssl.trustStorePassword="*Your trust store password*"

If the certificates do not match, the Marketing Platform log file contains an error such as the following.

```
Caused by: sun.security.provider.certpath.SunCertPathBuilderException:
unable to find valid certification path to requested target
```

Prerequisites

The Marketing Platform must be installed, deployed, and running.

Syntax

```
scheduler_console_client -v -t trigger_name user_name

scheduler_console_client -s -t trigger_name user_name
```

Commands

-v

List the scheduler jobs configured to listen for the specified trigger.

Must be used with the `-t` option.

-s

Send the specified trigger.

Must be used with the `-t` option.

Options

-t *trigger_name*

The name of the trigger, as configured in the scheduler.

Example

- List jobs configured to listen for a trigger named `trigger1`.
  ```
  scheduler_console_client -v -t trigger1 myLogin
  ```
- Execute jobs configured to listen for a trigger named `trigger1`.
  ```
  scheduler_console_client -s -t trigger1 myLogin
  ```

Chapter 15. Marketing Platform SQL scripts

This section describes the SQL scripts provided with Marketing Platform to perform various tasks relating to the Marketing Platform system tables.

The Marketing Platform SQL scripts are located in the `db` directory under your Marketing Platform installation.

The scripts are designed to be run against the Marketing Platform system tables, using the database client.

ManagerSchema_DeleteAll.sql

The `Manager_Schema_DeleteAll.sql` script removes all data from the Marketing Platform system tables without removing the tables themselves. This script removes all users, groups, security credentials, data filters, and configuration settings from Marketing Platform.

When to use ManagerSchema_DeleteAll.sql

You might want to use `ManagerSchema_DeleteAll.sql` if corrupted data prevents you from using an instance of Marketing Platform.

Additional requirements

To make Marketing Platform operational after running `ManagerSchema_DeleteAll.sql` , you must perform the following steps.

- Run the `populateDB` utility. The `populateDB` utility restores the default configuration properties, users, roles, and groups, but does not restore any users, roles, and groups you have created or imported after initial installation.
- Use the configTool utility with the `config_navigation.xml` file to import menu items.
- If you have performed any post-installation configuration, such as creating data filters or integrating with an LDAP server or web access control platform, you must perform these configurations again.
- If you want to restore previously existing data filters, run the `datafilteringScriptTool` utility using the XML originally created to specify the data filters.

ManagerSchema_PurgeDataFiltering.sql

The `ManagerSchema_PurgeDataFiltering.sql` script removes all data filtering data from the Marketing Platform system tables without removing the data filter tables themselves. This script removes all data filters, data filter configurations, audiences, and data filter assignments from Marketing Platform.

When to use ManagerSchema_PurgeDataFiltering.sql

You might want to use `ManagerSchema_PurgeDataFiltering.sql` if you need to remove all data filters without removing other data in the Marketing Platform system tables.

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Important: The ManagerSchema_PurgeDataFiltering.sql script does not reset the values of the two data filter properties, Default table name and Default audience name. If these values are no longer valid for the data filters you want to use, you must set the values manually on the Configuration page.

SQL scripts for creating system tables

Use the scripts described in the following table to create Marketing Platform system tables manually, when your company policy does not allow you to use the installer to create them automatically.

The scripts are shown in the order in which you must run them.

Table 24. Scripts for creating system tables

Datasource Type	Script Names
IBM DB2	• ManagerSchema_DB2.sql If you plan to support multi-byte characters (for example, Chinese, Japanese, or Korean), use the ManagerSchema_DB2_unicode.sql script. • ManagerSchema__DB2_CeateFKConstraints.sql • active_portlets.sql
Microsoft SQL Server	• ManagerSchema_SqlServer.sql • ManagerSchema__SqlServer_CeateFKConstraints.sql • active_portlets.sql
Oracle	• ManagerSchema_Oracle.sql • ManagerSchema__Oracle_CeateFKConstraints.sql • active_portlets.sql

If you plan to use the scheduler feature that enables you to configure a flowchart to run at predefined intervals, you must also create the tables that support this feature. To create the scheduler tables, run the appropriate script, as described in the following table.

Table 25. Scripts for enabling the IBM Marketing Software Scheduler

Data Source Type	Script Name
IBM DB2	quartz_db2.sql
Microsoft SQL Server	quartz_sqlServer.sql
Oracle	quartz_oracle.sql

When to use the create system tables scripts

You must use these scripts when you install or upgrade Marketing Platform if you have not allowed the installer to create the system tables automatically, or if you have used ManagerSchema_DropAll.sql to delete all Marketing Platform system tables from your database.

ManagerSchema_DropAll.sql

The `ManagerSchema_DropAll.sql` script removes all Marketing Platform system tables from a database. This script removes all tables, users, groups, security credentials, and configuration settings from Marketing Platform.

Note: If you run this script against a database containing an earlier version of the Marketing Platform system tables, you might receive error messages in your database client stating that constraints do not exist. You can safely ignore these messages.

When to use ManagerSchema_DropAll.sql

You might want to use `ManagerSchema_DropAll.sql` if you have uninstalled an instance of Marketing Platform where the system tables are in a database that contains other tables you want to continue using.

Additional requirements

To make the Marketing Platform operational after running this script, you must perform the following steps.

- Run the appropriate SQL script to re-create the system tables.
- Run the `populateDB` utility. Running the `populateDB` utility restores the default configuration properties, users, roles, and groups, but does not restore any users, roles, and groups you have created or imported after initial installation.
- Use the `configTool` utility with the `config_navigation.xml` file to import menu items.
- If you have performed any post-installation configuration, such as creating data filters or integrating with an LDAP server or web access control platform, you must perform these configurations again.

Chapter 16. Uninstalling Marketing Platform

Run the Marketing Platform uninstaller to uninstall Marketing Platform. When you run the Marketing Platform uninstaller, the files that were created during the installation process are removed. For example, files such as configuration files, installer registry information, and user data are removed from the computer.

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

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

Note: On UNIX, the same user account that installed Marketing Platform must run the uninstaller.

1. If you have deployed the Marketing Platform web application, undeploy the web application from WebSphere or WebLogic.
2. Shut down WebSphere or WebLogic.
3. Stop the processes that are related to Marketing Platform.
4. If the `ddl` directory exists in the product installation directory, run the scripts that are provided in the `ddl` directory to drop tables from the system table database.
5. Complete one of the following steps to uninstall Marketing Platform:
   - Click the Marketing Platform uninstaller that exists in the `Uninstall_Product` directory. The uninstaller runs in the mode in which you installed Marketing Platform.
   - In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Marketing Platform by using the console mode:

     `Uninstall_Product -i console`
   - In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Marketing Platform by using the silent mode:

     `Uninstall_Product -i silent`

     When you uninstall Marketing Platform by using the silent mode, the uninstallation process does not present any dialogs for user interaction.

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

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Before you contact IBM technical support

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

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

Note: Technical Support does not write or create API scripts. For assistance in implementing our API offerings, contact IBM Professional Services.

Information to gather

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

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

System information

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

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

You can access the About page by selecting **Help > About**. If the About page is not accessible, check for a `version.txt` file that is located under the installation directory for your application.

Contact information for IBM technical support

For ways to contact IBM technical support, see the IBM Product Technical Support website: (http://www.ibm.com/support/entry/portal/open_service_request).

Note: To enter a support request, you must log in with an IBM account. This account must be linked to your IBM customer number. To learn more about associating your account with your IBM customer number, see **Support Resources > Entitled Software Support** on the Support Portal.

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