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IBM Marketing Software Fast Upgrade Guide
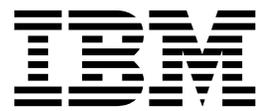
IBM

Contents

Chapter 1. Before you begin fast upgrade

1. The fast upgrade approach supports the IBM Marketing Software products (IBM Marketing Platform, IBM Campaign, IBM Contact Optimization, IBM Marketing Operations, IBM Interact) upgrade 8.6.x version onwards.

2. While migrating the - IBM Marketing Platform, IBM Campaign, IBM Contact Optimization, IBM Marketing Operations, IBM Interact - system database from source (the production / test) environment to 11.0 (a clean environment) it is strongly recommended that you check if all the required constraints and indexes are migrated successfully. Any failures in this will cause the fast upgrade to fail.

3. System tables data migration from source (production / test) environment to 11.0 (a clean environment) should be done with help of your DBA.

4. This upgrade should be executed, verified and tested on the QA environment before executing on the production environment.

5. Stop v11 all product application services, Campaign listener, Optimize listener or any other running processes before proceeding with fast upgrade

Chapter 2. High-level steps involved in the Fast Upgrade process

The IBM Marketing Software Fast upgrade process is introduced to help complete the upgrade process in a short time so that you encounter less downtime on your production environment. Also, Fast upgrade process will get executed on clean 11.0 environment, so users existing environment will remain untouched.

Installing a clean 11.0 environment

1. You must set up a clean 11.0 environment with the same products installed as in the old version.
2. You can setup a clean 11.0 environment either on the same hardware or a different hardware.
   We recommend that you setup a clean 11.0 environment on a different hardware. If installed on the same hardware you must configure the JVM memory options for the new environment and keep sufficient disk space, memory and CPU for the older versions as well as for the 11.0 version.
3. A clean 11.0 environment installation should be done with the stack combination used in the old version. For example, if your existing 8.6 version is installed on the RHEL operating system with the DB2 database, then a clean 11.0 should be installed on same operating system flavor and same database vendor. But, note that you must use the supported third party software - operating systems, application servers, database, and so on versions that 11.0 supports.
4. Ensure that the 11.0 application is up and running.

Migrating the system database

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

1. You must take a backup of the system tables from the old version.
2. You must also take a backup of the system tables from the 11.0 version.
3. Stop the clean installed 11.0 application.
4. Clean up the system tables of the 11.0 clean applications. This involves deleting all the tables, constraints, indexes, and so on from the system tables. Alternatively, you can create new database schemas to migrate system data from the old version to the 11.0 version.
5. Restore the database backup from the older version system tables to the 11.0 application system tables for all the required products into the respective database schema.

Executing the Fast Upgrade

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

Post Fast Upgrade

1. After completing the Fast Upgrade, you must execute the configuration steps for every product. Refer to the respective product section in this guide for details.

2. Perform a UAT on the upgraded environment. The old version can be shutdown once the UAT passes and the new 11.0 environment can then be used in production.

Chapter 3. Procedure: Fast upgrade Marketing Platform

Marketing Platform pre-upgrade

Import the Marketing Platform system tables backup from the old version to the system tables schema used in the clean 11.0 environment.

Upgrading the Marketing Platform database manually

You should manually execute the following scripts provided in the table underneath on the Marketing Platform database while upgrading from various base versions:

Version	SQL scripts to execute
8.6.x to 11.0	**SQL Server** • <PLATFORM_HOME>/db/upgrade86to8601/ insert_new_8601_locales.sql (do not execute this script if upgrading from 8.6.0.1 onwards) • <PLATFORM_HOME>/db/upgrade86to90/ ManagerSchema_SqlServer_90upg.sql • <PLATFORM_HOME>/db/upgrade90to91/ ManagerSchema_SqlServer_91upg.sql • <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_SqlServer_911upg.sql • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql • <PLATFORM_HOME>/db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql

8.6.x to 11.0	**Oracle**
	• <PLATFORM_HOME>/db/upgrade86to8601/ insert_new_8601_locales.sql (do not execute this script if upgrading from 8.6.0.1 onwards
	• <PLATFORM_HOME>/db/upgrade86to90/ ManagerSchema_Oracle_90upg.sql
	• <PLATFORM_HOME>/db/upgrade90to91/ ManagerSchema_Oracle_91upg.sql
	• <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_Oracle_911upg.sql
	• <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql
	• <PLATFORM_HOME>/db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql
	• <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql
	• <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql
	• <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql

8.6.x to 11.0	**DB2**
	• <PLATFORM_HOME>/db/upgrade86to8601/ insert_new_8601_locales.sql (do not execute this script if upgrading from 8.6.0.1 onwards
	• <PLATFORM_HOME>/db/upgrade86to90/ ManagerSchema_DB2_90upg.sql△△
	OR if Unicode environment execute: <PLATFORM_HOME>/ db/upgrade86to90/ManagerSchema_DB2_90upg_unicode.sql AND△
	• <PLATFORM_HOME>/db/upgrade86to90/ db2_unicode_fix_90.sql
	• <PLATFORM_HOME>/db/upgrade90to91/ ManagerSchema_DB2_91upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/upgrade90to91/ ManagerSchema_DB2_91upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_DB2_911upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade91to911/ ManagerSchema_DB2_911upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade912to10/ DB2_QRTZ_Scheduler_10_upggrade_Script.sql
	• <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg_unicode.sql
	• <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql

9.0.x to 11.0	**SQL Server** • • <PLATFORM_HOME>/db/upgrade90to91/ ManagerSchema_SqlServer_91upg.sql • • <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_SqlServer_911upg.sql • • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql • • <PLATFORM_HOME>/db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql • • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql • • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql
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9.0.x to 11.0	**DB2**
	• <PLATFORM_HOME>/db/upgrade90to91/
	  ManagerSchema_DB2_91upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/upgrade90to91/
	ManagerSchema_DB2_91upg_unicode.sql
	• • <PLATFORM_HOME>/db/upgrade91to911/
	  ManagerSchema_DB2_911upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/ upgrade91to911/
	ManagerSchema_DB2_911upg_unicode.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/
	  DB2_QRTZ_Scheduler_10_upggrade_Script.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/
	  ManagerSchema_DB2_10upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/upgrade912to10/
	ManagerSchema_DB2_10upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade10001to10002/
	  ManagerSchema_DB2_10002upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/upgrade10001to10002/
	ManagerSchema_DB2_10002upg_unicode.sql
	• • <PLATFORM_HOME>/db/ upgrade10002to101/
	  ManagerSchema_DB2_101upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/ upgrade10002to101/
	ManagerSchema_DB2_101upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade101to11/
	  ManagerSchema_DB2_11upg.sql
	
	OR if Unicode environment execute:
	
	<PLATFORM_HOME>/db/ upgrade101to11/
	ManagerSchema_DB2_11upg_unicode.sql

9.1.x to 11.0	**SQL Server**
	• • <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_SqlServer_911upg.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql
	• • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql
	• • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql
	• • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql
9.1.x to 11.0	**Oracle**
	• • <PLATFORM_HOME>/db/upgrade91to911/ ManagerSchema_Oracle_911upg.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql
	• • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql
	• • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql
	• • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql

| 9.1.x to 11.0 | **DB2**

<PLATFORM_HOME>/db/upgrade91to911/
ManagerSchema_DB2_911upg.sql

OR if Unicode environment execute:

<PLATFORM_HOME>/db/ upgrade91to911/
ManagerSchema_DB2_911upg_unicode.sql

<PLATFORM_HOME>/db/upgrade912to10/
DB2_QRTZ_Scheduler_10_upggrade_Script.sql

<PLATFORM_HOME>/db/upgrade912to10/
ManagerSchema_DB2_10upg.sql

OR if Unicode environment execute:

<PLATFORM_HOME>/db/upgrade912to10/
ManagerSchema_DB2_10upg_unicode.sql

<PLATFORM_HOME>/db/upgrade10001to10002/
ManagerSchema_DB2_10002upg.sql

OR if Unicode environment execute:

<PLATFORM_HOME>/db/upgrade10001to10002/
ManagerSchema_DB2_10002upg_unicode.sql

<PLATFORM_HOME>/db/ upgrade10002to101/
ManagerSchema_DB2_101upg.sql

OR if Unicode environment execute:

<PLATFORM_HOME>/db/ upgrade10002to101/
ManagerSchema_DB2_101upg_unicode.sql

<PLATFORM_HOME>/db/upgrade101to11/
ManagerSchema_DB2_11upg.sql

OR if Unicode environment execute:

<PLATFORM_HOME>/db/ upgrade101to11/
ManagerSchema_DB2_11upg_unicode.sql |
| 9.1.1.x to 11.0 | **SQL Server**
• • <PLATFORM_HOME>/db/upgrade912to10/
  ManagerSchema_SqlServer_10upg.sql
• • <PLATFORM_HOME>/db/upgrade912to10/
  SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql
• • <PLATFORM_HOME>/db/upgrade10001to10002/
  ManagerSchema_SqlServer_10002upg.sql
• • <PLATFORM_HOME>/db/upgrade10002to101/
  ManagerSchema_SqlServer_101upg.sql
• • <PLATFORM_HOME>/db/upgrade101to11/
  ManagerSchema_SqlServer_11upg.sql |

9.1.1.x to 11.0	**Oracle**
	• • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql
	• • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql
	• • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql
	• • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql
9.1.1.x to 11.0	**DB2**
	• • <PLATFORM_HOME>/db/upgrade912to10/ DB2_QRTZ_Scheduler_10_upggrade_Script.sql
	• • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg_unicode.sql
	• <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg_unicode.sql
	• <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql

9.1.2.x to 11.0	**SQL Server** • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_SqlServer_10upg.sql • <PLATFORM_HOME>/db/upgrade912to10/ SqlServer_QRTZ_Scheduler_10_upgrade_Script.sql • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql
9.1.2.x to 11.0	**Oracle** • • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_Oracle_10upg.sql • • <PLATFORM_HOME>/db/upgrade912to10/ Oracle_QRTZ_Scheduler_10_upgrade_Script.sql • • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql • • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql
9.1.2.x to 11.0	**DB2** • • <PLATFORM_HOME>/db/upgrade912to10/ DB2_QRTZ_Scheduler_10_upggrade_Script.sql • • <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/upgrade912to10/ ManagerSchema_DB2_10upg_unicode.sql • • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg_unicode.sql • • <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg_unicode.sql • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql

10.0.x to 11.0	**SQL Server** • • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_SqlServer_10002upg.sql • • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_SqlServer_101upg.sql • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql
10.0.x to 11.0	**Oracle** • • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_Oracle_10002upg.sql • • <PLATFORM_HOME>/db/upgrade10002to101/ ManagerSchema_Oracle_101upg.sql • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql
10.0.x to 11.0	**DB2** • <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/upgrade10001to10002/ ManagerSchema_DB2_10002upg_unicode.sql • • <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/ upgrade10002to101/ ManagerSchema_DB2_101upg_unicode.sql • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql OR if Unicode environment execute: <PLATFORM_HOME>/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql
10.1.0 to 11.0	**SQL Server** • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_SqlServer_11upg.sql
10.1.0 to 11.0	**Oracle** • • <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_Oracle_11upg.sql

10.1.0 to 11.0	**DB2**
	• <PLATFORM_HOME>/db/upgrade101to11/ ManagerSchema_DB2_11upg.sql
	OR if Unicode environment execute:
	<PLATFORM_HOME>/db/ upgrade101to11/ ManagerSchema_DB2_11upg_unicode.sql

Updating the JDBC files in Marketing Platform

In case you do not want to reuse the Platform schema used for a 11.0 clean installation and rather want to use another user schema, you will need to follow the additional steps underneath:

1. Back up the jdbc.properties file from the 11.0 environment (Platform/tools/bin/jdbc.properties). Update the username in the 11.0 platform system database / schema name in jdbc.properties file.

   Example of jdbc.properties:

   uasm.jdbc_driver=com.ibm.db2.jcc.DB2Driver
   uasm.data_source=jdbc:db2://<DB_HOST>:<DB_PORT>/<DB2_SID>
   uasm.data_source_login=<PLATFORM_DB_SCHEMA>
   uasm.data_source_password=ENC(T+rsrWP41Vqu8SoDARMhDdWkf0dFB0Zc)
   hibernate.dialect=org.hibernate.dialect.DB2Dialect

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

   encryptPasswords.sh –d <PLATFORM_DB_USER_PASSWORD>

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

3. In the application server, update the JNDI details (schema / SID, userid, password) for Platform JNDI as per the new database schema used with v11.0 environment.

Upgrading the Marketing Platform configuration

1. Execute the following command to upgrade Marketing Platform configurations to 11.0:
   Navigate to Platform/tools/bin directory
   Execute command:
   configTool -vp -p "Affinium" -f <UNICA_PLATFORM_HOME>/conf/ Manager_config.xml
   You might encounter an insertion of duplicate key related error:Please refer to troubleshooting section.

2. Execute the command:
   alertConfigTool.bat△ -I -f <UNICA_PLATFORM_HOME>/conf/ Platform_alerts_configuration.xml
   Execute the command: configTool.bat -vp -p "Affinium|Report|integrations" -f "<UNICA_PLATFORM_HOME>/conf/upgrade101to11/ cognos11_integration.xml"

3. Execute the command:
   configtool.bat -vp -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f
   "<PLATFORM_HOME>\conf\watsonAssistant_navigation.xml"
4. Execute the command: populateDb -n Manager
Note:If Upgrading from version 8.6.0, execute steps 5 and 6
5. Execute the command: upgrade86to90(Only Upgrading from version 8.6.0)
6. Execute the command: upgrade90to91(Only Upgrading from version 9.0)

Setting the Marketing Platform – Help About > Version

1. Change the Marketing Platform version in the database: Export the version
   configuration using the following command on clean 11.0 environment:
   configTool.sh -x -p "Affinium|Manager|about" -f<PLATFORM_HOME>/conf/
   about.xml
2. Edit the about.xml file generated by the above command. Change the version
   to 11.0.0.0.0.GA_BUILD. <GA_BUILD> - Please replace this with build number
   referring to version.txt from installation location.

   <property id="xxxxxx" name="releaseNumber" type="string_property"
   width="40">

   <value>11.0.0.0.0.GA_BUILD</value>

   </property>
3. Import the above mentioned about.xml edited file using the following
   command: configTool.sh -v -i -o -p "Affinium|Manager"
   -f⌂<PLATFORM_HOME>/conf/about.xml

Marketing Platform post-upgrade

1. Marketing Platform application navigation URL points to the old base
   environment. You must change the navigation URL using the SQL script from
   the Platform system database.
   Perform a UAT on Marketing Platform application.
2. The URL of the start page that appears when each users log in to IBM
   Marketing Software products has to be changed Manually from the
   USM_PERSONALIZATION table
3. Perform UAT on Marketing Platform Application. Make Sure all the Function
   are Working Correctly.

Chapter 4. Procedure: Fast upgrade Campaign

Campaign pre-upgrade

1. Import the Campaign system tables backup from the old / base version to the system tables schema used in the clean 11.0 environment.
2. Take a File system backup of the "CAMPAIGN_HOME/partitions/partition1" directory.
3. Copy all the partitions data from the old environment's partition folders to the clean 11.0 environments Campaign partition folder.

Upgrading Campaign

1. Update the setenv.sh file the with required values for the Campaign upgrade. For details on environment variables in the setenv.sh file, refer to the Campaign 11.0 Upgrade guide.

   a. Navigate to the path: <installation path>/Campaign/tools/upgrade/10.1+to11.0/

      Set the following variables in the setenv.sh file:

      Set JAVA_HOME='<Installation Path >/jre'

      Set CAMPAIGN_HOME='<Installation Path>/Campaign'

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

      Set JDBCDRIVER_CLASSPATH=<JDBC DRIVER CLASSPATH>

   b. Add the JVM Option "-DFAST_UPGRADE_VERSION=<BASE_VERSION>"

      For example:

      JAVA_OPTIONS="${JAVA_OPTIONS} -DFAST_UPGRADE_VERSION=8.6.x

   c. Supported versions in fast upgrade:

Upgrade from Version	JVM Option
8.6.x	-DFAST_UPGRADE_VERSION=8.6.x
9.0.x	-DFAST_UPGRADE_VERSION=9.0.x
9.1.x.x (9.1.x, 9.1.1.x and 9.1.2.x)	-DFAST_UPGRADE_VERSION=9.1.x
10.0.x	-DFAST_UPGRADE_VERSION=10.0.x
10.1.x	-DFAST_UPGRADE_VERSION=10.1.x

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

3. Execute Campaign "acUpgradeTool.sh".
   This Upgrade tool execution is similar to the usual acUpgradeTool execution. During the upgrade tool execution when prompted for "select base version to upgrade", you can see the upgrade version specified with the JVM option "-DFAST_UPGRADE_VERSION=<BASE_VERSION>".
   Select the fast upgrade base version to upgrade from.

Campaign post-upgrade

Setting the Campaign – Help About > Version

1. Change the Campaign version in the Marketing Platform registration:
   a. Export the version configuration using the following command on clean 11.0 environment:
      ./configTool.sh -x -p "Affinium|Campaign|about" -f <PLATFORM_HOME>/conf/campaign_about.xml
   b. Edit the campaign_about.xml file generated by the above command. Change the version to 11.0.0.0.0.GA_BUILD".<GA_BUILD> - Please replace this with build number referring to version.txt from installation location.

      <property id="xxxxxx" name="releaseNumber" type="string_property" width="40">

      <value>11.0.0.0.0.GA_BUILD</value>

      </property>
   c. If Contact Optimize is also being upgraded update following tag:

      <displayNameKey>Optimize Version</displayNameKey>

      <displayName>Optimize Version</displayName>

      <value>11.0.0.0.0.GA_BUILD</value>
   d. Import the above edited file using the following command:
      ./configTool.sh -v -i -o -p "Affinium|Campaign" -f <PLATFORM_HOME>/Platform/conf/campaign_about.xml
2. Execute the following command to upgrade Campaign Security Policies from the base version to version 11.0:

   Navigate to <Platform_Home/tools/bin>

   ./populateDb.sh -n Campaign

Campaign configuration changes

1. Campaign "Campaign REST API Filter" registration:
   a. Navigate to the PLATFORM_HOME/tools/bin directory.
   b. Execute the following command:
      ./configTool.sh -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <CAMPAIGN_HOME>/conf/API_Filter.xml
2. Campaign "Engage REST API" registration:
   a. Navigate to the PLATFORM_HOME/tools/bin directory.
   b. Execute the following command:
      ./configTool.sh -vp -p "Affinium|suite|security|apiSecurity|campaign" -f <CAMPAIGN_HOME>/conf/Engage_API_Filter.xml
3. Change Campaign configurations in the Marketing Platform configuration:
   a. Change the Campaign navigation URLs.
   b. Change the "serverHost" under Settings for 'unicaACListener'△(Affinium|Campaign|unicaACListener).
   c. Change DSN under UA_SYSTEM_TABLES if required.
   d. Change the JNDI name under UA_SYSTEM_TABLES if required.
   e. Remap all system tables in the Campaign table mapping. This can be done using the following steps: 1. Stop the listener.
      2. Remove "unica_tblcache.mgr" from <CAMPAIGN_HOME>/partitions/partition/conf.

3. Start the listener.

4. Navigate to Campaign settings > Table mapping.

4. Platform – DBResourceBundle: The steps underneath will import resource bundles in Marketing Platform. Execute the script underneath as specified:

   a. Navigate to <platform_home>/tools/bin

   b. DBResourceBundle.sh /bat -P Campaign -F <Campaign_home>/ resourcebundles

Campaign post-upgrade functional check

Perform UAT on Campaign application. Ensure that all the flowchart are opening and the run is successful.

Chapter 5. Procedure: Fast upgrade Contact Optimize

1. Restore CO system tables backup from old / base version to system tables schema used for clean 11.0 environment.
2. Take a File system backup for the "CO_HOME/partitions/partition1" directory.
3. Copy all partitions data from the old environments partition folders to the clean 11.0 environments CO partition folder.
4. Execute following script on Campaign 11.0 system database:

   a. Execute following script on Campaign 11.0 system database:

      -- 9.0 Updates --

      ALTER TABLE UACO_OptSession ADD AgentChannelName VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD AgentInfoTemplateTable VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD AgentCustomerRelTemplateTable VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD CustomSettingsFlag int;

      ALTER TABLE UACO_OptSession ADD CustomSettingsXML VARCHAR(4000);

      ALTER TABLE UACO_OptSession ADD LastRunType VARCHAR(192);

      UPDATE UACO_OptSession SET LastRunType = 'Production Run';

      CALL SYSPROC.ADMIN_CMD ('REORG TABLE UACO_OptSession');

      -- 9.1.1 Updates --

      ALTER TABLE UACO_OptSession ADD AgentChannelName VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD AgentInfoTemplateTable VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD AgentCustomerRelTemplateTable VARCHAR(192);

      ALTER TABLE UACO_OptSession ADD LastRunType VARCHAR(192);

      UPDATE UACO_OptSession SET LastRunType = 'Production Run';

      -- 10.0 Updates --

      < No script needed >

   b. Execute the script that resides at the following location on the Campaign 11.0. system database:
      <CONTACTOPTIMIZE_HOME>/ddl/aco_extra_indexes_ora.sql

Setting the Contact Optimize – Help About > Version

1. Change the CO version in the Marketing Platform registration:

   a. Export the version configuration using the following command on a clean 11.0 environment:
      configTool.sh -x -p "Affinium|Campaign|about" -f <PLATFORM_HOME>/conf/campaign_about.xml

   b. Edit the campaign_about.xml file generated by the above command. Change the version to 11.0.0.0.0.GA_BUILD".

      <displayNameKey>Optimize Version</displayNameKey>

<displayName>Optimize Version</displayName>

<value>11.0.0.0.0.33</value>

   c. Import the above edited file using the following command:
configTool.sh -v -i -o -p "Affinium|Campaign" -f⌂<PLATFORM_HOME>/
Platform/conf/campaign_about.xml

2. Change Campaign configurations in the Marketing Platform configuration:

   a. Change the "serverHost" in the Settings of
'unicaACOListener'(Affinium|Campaign|unicaACOListener)

   b. Remap all the system tables in the Campaign table mapping. This can be
done using following the steps:
Stop the listener.
Remove "unica_tblcache.mgr" from <CO_HOME>/partitions/partition/
conf.
Start the listener.
Navigate to Campaign settings > Table mapping.

Chapter 6. Procedure: Fast upgrade Interact

Pre-requisites to upgrade from Interact 8.6.x to Interact 11.0:

1. Ensure that Platform and Campaign are upgraded successfully on the target setup. Install Interact 11.0 on the setup.
2. Deploying interactRT.war on the target system is not required.
3. Take a Backup for 8.6 Databases InteractDT, InteractRT,Interact Learning, Interact prod
4. Make sure that the Interact related files in Campaign's 'partition' folder are copied from the source system to the target system.
5. Create data sources on the target WAS server and point to the new database schema. You can use the same JNDI names as those in the source 8.6 system to save effort in doing manual changes.

Upgrading Interact DT

1. Update setenv.sh with the values required for upgrade. For details on the environment variables in the setenv.sh file, refer to the Interact 11.0 Upgrade guide.

   a. Navigate to the path: <Interact_Home>/interactDT/tools/upgrade/ 10.1+to11.0/

   Set the following variables in the setenv.sh file:

   set△ JAVA_HOME='<Installation Path >/jre'.

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

   For example: set JDBCDRIVER_CP=/opt/IBM/FastUpgrade11/ojdbc7.jar

   set JDBCDRIVER_CLASS=Datasase driver

   set JDBCDRIVER_URL=Database url△

   Change the Log file Name and location if required

   Navigate to <Interact_Home>\interactDT\tools\upgrade\conf

   edit file ACIUpgradeTaskList.properties△ and change the△Value of CHOICES_FOR_PREVIOUS_VERSIONS=10.1.0△to CHOICES_FOR_PREVIOUS_VERSIONS=8.6.x or other base version you are upgrading from

2. Pre-requisite to complete before running the Interact upgrade tool: Under <Interact_Home>\interactDT\tools\upgrade\conf directory "jdbc.properties" file contains the correct JDBC URL, Platform system database userID and encrypted password.
   If this information is incorrect , then the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool.sh/bat". This Upgrade tool execution is similar to the usual acUpgradeToolexecution of Campaign.

4. While executing the upgrade tool you are prompted for database details. Enter the Interact DesignTime Database details.

5. The tool will also△prompt for "select base version to upgrade". You will able to see the upgrade version specified for CHOICES_FOR_PREVIOUS_VERSIONS. Select the fast upgrade base version to upgrade from.

6. Once the upgrade tool execution completes, check the related logs to ensure that no errors were encountered during the upgrade tool execution.

Upgrading Interact RT, Interact learning and Interact Production databases

1. Update setenv.sh with required values for Interact upgrade. For details on the environment variables in the setenv.sh file, refer to the Interact 11.0 Upgrade guide.

    a. Navigate to Path: <Interact_Home>/tools/upgrade/10.1+to11.0/
    Set the following variables in the setenv.sh file:

    set JAVA_HOME='<Installation Path >/jre'

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

    ex: set JDBCDRIVER_CP=/opt/IBM/FastUpgrade11/ojdbc7.jar

    set JDBCDRIVER_CLASS=Datasase driver

    set JDBCDRIVER_URL=Database url

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

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

    Change the log file name and location if required.

    b. Navigate to <Interact_Home>\tools\upgrade\conf edit file ACIUpgradeTaskList_crhtab.properties and change the value of CHOICES_FOR_PREVIOUS_VERSIONS=10.1.0 to CHOICES_FOR_PREVIOUS_VERSIONS=8.6.x or other base version you are upgrading from.

    c. Repeat the above change for the ACIUpgradeTaskList_lrntab.properties, ACIUpgradeTaskList_runtab.properties, ACIUpgradeTaskList_usrtab.properties files at the above mentioned path.

2. Pre-requisite to complete before running the Interact upgrade tool:
    In the <Interact_Home>\tools\upgrade\conf directory, the "jdbc.properties" file contains the correct JDBC URL, Platform system database userID and encrypted password.
    If this information is incorrect, the Interact upgrade tool will fail with database authentication related errors.

3. Execute Interact "aciUpgradeTool_crhtab .sh/bat" . This Upgrade tool execution is similar to the usual aciUpgradeTool.

    a. While executing the upgrade tool you are prompted for database details. Please mention the details of the Interact DesignTime Database. The tool will also prompt for "select base version to upgrade". You will see the upgrade version specified with CHOICES_FOR_PREVIOUS_VERSIONS= . Select the fast upgrade base version you are upgrading from.

    b. Once the upgradetool execution completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.

4. Execute Interact "aciUpgradeTool_runtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.

    a. While executing the upgrade tool you are prompted for database details. Enter the Interact RunTime Database details.
    The tool will also prompt for "select base version to upgrade", you can see

the upgrade version specified in CHOICES_FOR_PREVIOUS_VERSIONS. Select the fast upgrade base version you are upgrading from.

   b. Once the upgradetool execute completes, check the related logs and ensure that no errors were encountered during the upgrade tool execution.

5. Execute Interact "aciUpgradeTool_lrntab .sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.

   a. While executing the upgrade tool you are prompted for database details. Enter the Interact Learning Database details.
The tool will also⌂prompt for "select base version to upgrade". You can see the upgrade version specified with CHOICES_FOR_PREVIOUS_VERSIONS. Select the fast upgrade base version to upgrade from.

   b. Once the upgradetool execution completes, check the related logs and ensure that errors were not encountered during the upgrade tool execution.

6. Execute Interact "aciUpgradeTool_usrtab.sh/bat". This Upgrade tool execution is similar to the usual aciUpgradeTool.

   a. During the execution of the upgrade tool, you are prompted for database details. Enter the Interact Production/prod Database details.
The tool will also⌂prompt for "select base version to upgrade". You can see the upgrade version specified with CHOICES_FOR_PREVIOUS_VERSIONS. Select the fast upgrade base version to upgrade from.

   b. Once the upgradetool execution completes, check the related logs and ensure no errors were encountered during the upgrade tool execution.

Post Upgrade

1. Interact version registration:

   a. Execute the following command on the source 8.6 environment: Navigate to the PLATFORM_HOME/tools/bin directory. Execute the command: ./configTool.sh -x -p "Affinium|Interact|about" -f Interact_about.xml

   b. Copy the exported output on the 11.0 - Destination system under the PLATFORM_HOME/tools/bin directory.

   c. Modify the version information in "Interact_about.xml" file referring to the Interact version in version.txt.
For example:
<property id="1211" name="releaseNumber" type="string_property" width="40">
<value>11.0.0.0.<Build number as per version.txt></value>
</property>

   d. Execute the following command on the destination 11.0 environment: ./configTool.sh -v -o -i -p "Affinium|Interact" -f Interact_about.xml

   e. Copy the "Interract_version_register.xml" file to the <Installation Path>/Interact/interactDT/conf location.

   f. Execute the following command on the destination 11.0 environment:
Navigate to the PLATFORM_HOME/tools/bin directory.
Execute the command: ./configTool.sh -vp -p "Affinium|Campaign|about" -f Interract_version_register.xml⌂-o

   g. For the Interact sub component version, execute the following command on the destination 11.0⌂environment:
Navigate to the PLATFORM_HOME/tools/bin directory.
Execute command: ./configTool.sh -i -p
"Affinium|Campaign|about|components " -f
interact_subcomponent_version.xml –o

2. Deploy Interact RT WAR file

The second Interact runtime

1. Repeat the following steps for each Interact runtime if you have used a different server group and Platform.
2. Install New Platform 11.0with Interact RT.
3. Perform the Platform upgrade and make the setup ready. (Refer the Platform Upgrade Guide.)
4. Copy and restore the InteractRT database from the source to the target.
5. Upgrade the database from 8.6 to 11.0 by running the aciupgrade utility for RT.
6. Create data sources on the target WAS server using the same JNDI names as the source 8.6 setup.
7. Deploy InteractRT.war.

Important

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

Note

After Upgrade, it is observed that a Configuration Node sessionManagement is displayed under:
`Affinium|interact|`
Removal of this configuration can be done using the Platform configTool.sh/configTool.bat tool.
After upgrade, it is observed that configuration Node treatmentStore is displayed under:
`Affinium|Interact|services|contactHist|`
Removal of this configuration can be done using the Platform configTool.sh/configTool.bat tool

Chapter 7. Procedure: Fast upgrade Marketing Operations

Marketing Operations pre-upgrade

1. Import the Marketing Operations system tables backup from the old version to the system tables schema used in a clean 11.0 environment.

2. Take a file system backup of the source and the destination of the following folders:

   "MarketingOperations_HOME/ accountattachments" directory.

   "MarketingOperations_HOME/ approvalitems" directory.

   "MarketingOperations_HOME/ assets" directory.

   "MarketingOperations_HOME/ componentattachments" directory.

   "MarketingOperations_HOME/ images" directory.

   "MarketingOperations_HOME/ invoiceattachments" directory.

   "MarketingOperations_HOME/ planattachments" directory.

   "MarketingOperations_HOME/ programattachments" directory.

   "MarketingOperations_HOME/ projectattachments" directory.

   "MarketingOperations_HOME/ templates" directory.

   "MarketingOperations_HOME/ messages" directory.

   "MarketingOperations_HOME/ conf" directory.

3. Copy all the required files mentioned in step2 in 11.0from the source folders to the destination MarketingOperations respective folders.

4. Also copy "MarketingOperations_HOME/ conf/ plan_log4j.xml" and "MarketingOperations_HOME/ conf/ plan_ehcache.xml" in 11.0 from source to destination respective folders.

5. Create a new folder ext_data on a destination server at the - "<PLAN_HOME>\messages\com\ibm\umo\" path.
   This new folder at the destination will contain the new 11.0 <UMOConfigurationMessages_<locale>.properties > files.

6. Copy <UMOConfigurationMessages_<locale>.properties> and <UMOMktObjectConfigurationMessages_<locale>.properties> in 11.0 from the "MarketingOperations_Home/messages/com/ibm/umo/ext" from the source folder for each local to the respective destination folder ("MarketingOperations_Home/messages/com/ibm/umo/ext).

7. If there are marketing objects in the source setup, copy following files on 11.0: mo_creatives_state.xml globalstates.xml sysmenu.xml sysmodules.xml from <MarketingOperations_Home>/conf/en_US from source to 11.0

8. Perform this step if you have installed Marketing Operations and chose manual database. Ignore this step if you have chosen the automatic database.

   a. Unregister the Marketing Operations - ./configTool.sh -u Plan

   b. Register with 8.6 config:

      ./configTool.sh -r Plan -f "MarketingOperations_Home/conf/ plan_registration.xml"

      Use following command:

      configTool.bat -vp -p "Affinium" -f"MarketingOperations_Home/conf /plan_registration.xml"

Upgrading Marketing Operations

Updating JDBC files

In case you do not want to reuse the Plan schema used in the 11.0 clean installation and rather want to use another user schema, follow the additional steps underneath:

1. Back up the jdbc.properties file from the 11.0 environment (MarketingOperations/tools/bin /umo_jdbc.properties). Update the username of the 11.0 platform system database / schema name in the umo_jdbc.properties file.
Example of umo_jdbc.properties:

   # Name:

   #umo_data_source.url

   # Description:

   #URL reference for the IBM Marketing Operations system table database.

   #

   # Example values for supported databases are:

   #

   # SQL Server:

   #jdbc:sqlserver://sqlserverHost:1433;databaseName=databaseName

   # IBM DB2:

   #jdbc:db2://db2Host:50000/databaseName

   # Oracle:

   #jdbc:oracle:thin:@oracleHost:1521:databaseName

   umo_data_source.url=jdbc:oracle:thin:@tiger118.nonprod.hclpnp.com:1521:orcl

   # Name:

   #umo_data_source.login

   # Description:

   #Name of login for IBM Marketing Operations database-

   #login account must have database administrative rights.

   # Name of login for IBM Marketing Operations database.

   #login account must have database administrative rights.

   umo_data_source.login=xmsp

   # Name:

   #umo_data_source.password

   #Description:

   #Password for IBM Marketing Operations database

   #for login id provided in umo_data_source.login property

   umo_data_source.password=ENC(+1Kd731xEuzqdDfqjQ9wnw==) Note: If you have used the same user in the Platform and Marketing Operations, you can take the encrypted password from the Platform/tools/bin/jdbc.properties file.

2. Upgrade to 11.0.0.0 config:
   a. Copy the 8.6 plan_registration.xml to the UMO_HOME\conf folder.
   b. Run the commands underneath at Platform_Home/tools/bin:
      ./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f MarketingOperations_Home/conf/plan_approvals_settings_10.0.0.2.xml"
      ./configTool.sh -vp -p "Affinium|Plan|umoConfiguration" -f

MarketingOperations_Home/conf/
plan_workflowservice_settings_10.0.0.2.xml"
run config_migration.sh in MarketingOperations_Home/tools/bin
Prerequisite:set/update UMO_HOME in the config_migration.sh file
./config_migration.sh -p MarketingOperations_Home -b 8.6.0.0

Upgrading Marketing Operations database

1. Import the database with the source system tables of the VM containing the fresh installation of 11.0.0.0 Marketing Operations.

2.

   a. Run the umouilistupgrade utility from tools/bin to merge the UMOConfigurationMessages_<locale>.properties and the UMOMktObjectConfigurationMessages_<locale>.properties of 8.6 and 11.0. This utility does not have any parameters: umouilistupgrade.bat

   b. Run the umodbsetup utility to upgrade the database to 11.0.0.0:
   umodbsetup.bat –t upgrade –m –b 8.6–L en_US
   (Type the above command in the command prompt. Copy - paste might give an error.)

   c. Execute the command:umodbsetup.bat –t upgrade –b 8.6
   If this does not work, you can execute the
   umo_upgrade_[8.6.0.0.0]_[11.0.0.0.0].sql file on the MO database. This file is located at MarketingOperations_Home\tools.

Marketing Operations post-upgrade

Marketing Operations Configuration changes

Deploy MO 11.0.0.0 war and run the Marketing Operations Java Upgrade as in the following procedure:

1. Login as admin user.

2. In (Affinium|Plan|umoConfiguration) update the location for the nodes lised underneath:
   templates
   attachmentFolders
   integrationServices

3. Update notifyPlanBaseURL in Affinium|Plan|umoConfiguration|notifications.

4. Update serverURL in Affinium|Plan|navigation.

5. Goto Settings -> Marketing Operations -> Marketing Operations Upgrade.

6. Check all the checkboxes.

7. Click the "Upgrade" button.

Setting the Marketing Operations – Help About > Version

Change the Marketing Operations version in the Marketing Platform registration:

1. Export the version configuration using the following command on clean 11.0 environment:
   configTool.sh -x -p "Affinium|Plan|about" -f <PLATFORM_HOME>/conf/plan_about.xml

2. Edit the plan_about.xml file generated by the above command. Change the version to 11.0.0.0.0.GA_BUILD".

   <property id="xxxxxx" name="releaseNumber" type="string_property" width="40">

```
                  <value>11.0.0.0.0.GA_BUILD</value>
                  </property>
```

3. Import this edited xml file using the following command:
   `configTool.sh -v -i -o -p "Affinium|Plan" -f⌂<PLATFORM_HOME>/conf/plan _about.xml`

Marketing Operations Post Upgrade Functional check

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

Chapter 8. Procedure: Fast upgrade Reports

IBM Campaign Report Fast Upgarde

Below steps will give you high level overview of Reports Upgrade process:

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with IBM Marketing Software v11.0.

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

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

User will need to follow the regular reports upgrade steps referring to IBM Marketing Software Reports Installation and Configuration Guide. High level steps involved in the report Installation are as follows.

* Run <ReportsPackCampaign>/schema/templates_sql_load.sql on Platform database schema for v11
* Run <ReportsPackCampaign>/tools/import_all.sh. This will upgrade Cognos schema registration in Platform configuration. Please take a backup of Reports configuration using configTool before running this step
* Generate SQL Views again and run on Campaign database schema
* Import Campaign Reports v11.0 reports zip file (<ReportsPackCampaign>\cognos11\Unica Reports for Campaign.zip) in IBM Cognos framework manager.
* Import and Publish Campaign Reports model version v11 using IBM Cognos framework manager

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

* Run <ReportsPackCampaign>/schema/templates_sql_load.sql on Platform database schema for v11
* Run <ReportsPackCampaign>/tools/import_all.sh. This will upgrade Cognos schema registration in Platform configuration. Please take a backup of Reports configuration using configTool before running this step
* Generate SQL Views again and run on Campaign database schema
* Backup customize reports from old IBM Cognos BI server
* Import IBM Campaign base version (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.
* In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

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

Campaign Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager

8.6.x	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade86to90.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade90to91.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade91to911.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade911to9112.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade912to100.xml`

9.0.x	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade90to91.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade91to911.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade911to9112.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade912to100.xml`

9.1.x	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade91to911.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade911to9112.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade912to100.xml`

9.1.1.x	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade911to9112.xml`
	
	`<ReportsPackCampaign>\cognos11\`
	`CampaignModel\upgrade912to100.xml`

9.1.2.x	`<ReportsPackCampaign>\cognos11\` `CampaignModel\upgrade912to100.xml`
10.0.x	No Change in Campaign Reports Model
10.1.x	No Change in Campaign Reports Model

IBM Marketing Operation Report Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with IBM Marketing Software v11.0.

Upgrade Steps for Reports when no customization done in Marketing Operations Reports:

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

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

1. Please take a backup of model in base setup

2. Import Unica Reports for Marketing Operations.zip file from v11.0 (<ReportsPackMarketingOperations>\cognos11) in IBM Cognos framework manager.

3. Import and Publish Reports model version v11 using IBM Cognos framework manager

4. Use the newly published model while configuring reports with the server.

◇

Upgrade Steps for Reports when customization is done in Marketing Operations Reports:

1. Backup customize reports from old IBM Cognos BI server

2. Import Unica Reports for Marketing Operations.zip file (version you are upgrading from) model zip file in IBM Cognos framework manager. Please make sure to import customize reports from older version as well.

3. In IBM Cognos framework manager execute the report model upgrade steps as mentioned below.

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

MO Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade86to90.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade90to91.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade91to911.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade911to9112.xml
9.0.x	<ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade90to91.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade91to911.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade911to9112.xml
9.1.x	<ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade91to911.xml <ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade911to9112.xml
9.1.1.x	<ReportsPackMarketingOperations>\cognos11\PlanModel\upgrade911to9112.xml
9.1.2.x	No Change in Plan Reports Model
10.0.x	No Change in Plan Reports Model
10.1.x	No Change in Plan Reports Model

IBM Marketing Operation and Campaign Report Fast Upgrade

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

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

1. Please take a backup of model in base setup
2. Import Unica Reports for Marketing Operations and Campaign.zip file from v11.0 (<ReportsPackCampaignMarketingOperations>\cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v11 using IBM Cognos framework manager
4. Use the newly published model while configuring reports with the server.

◇

Upgrade Steps for Reports when customization is done in Marketing Operations Reports:

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

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

MO Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<ReportsPackCampaignMarketingOperations>\cognos11\PlanCampaign\upgrade86to90.xml

<ReportsPackCampaignMarketingOperations>\cognos11\PlanCampaign\upgrade90to91.xml

<ReportsPackCampaignMarketingOperations>\cognos11\PlanCampaign\upgrade91to911.xml

<ReportsPackCampaignMarketingOperations>\cognos11\PlanCampaign\upgrade911to9112.xml |

9.0.x	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade90to91.xml`
	
	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade91to911.xml`
	
	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade911to9112.xml`

9.1.x	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade91to911.xml`
	
	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade911to9112.xml`

9.1.1.x	`<ReportsPackCampaignMarketingOperations>\` `cognos11\PlanCampaign\` `upgrade911to9112.xml`
9.1.2.x	No Change in Plan Reports Model
10.0.x	No Change in Plan Reports Model
10.1.x	No Change in Plan Reports Model

IBM Interact Reports Fast Upgrade

User will need to perform new installation of IBM Cognos Analytics (formerly known as IBM Cognos Business Intelligence Server) version compatible with IBM Marketing Software v11.0.

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

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

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

1. Please take a backup of model in base setup
2. Import Unica Reports for Interact.zip file from v11.0 (<ReportsPackInteract>\ cognos11) in IBM Cognos framework manager.
3. Import and Publish Reports model version v11 using IBM Cognos framework manager
4. Use the newly published model while configuring reports with the server.

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

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

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

Interact Reports version to upgrade from	Cognos Model Upgrade scripts to execute from IBM Cognos framework Manager
8.6.x	<ReportsPackInteract>\cognos11\ InteractModel\upgrade86to90.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade90to91.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade91to911.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade911to9112.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade912to9121.xml
9.0.x	<ReportsPackInteract>\cognos11\ InteractModel\upgrade90to91.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade91to911.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade911to9112.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade912to9121.xml
9.1.x	<ReportsPackInteract>\cognos11\ InteractModel\upgrade91to911.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade911to9112.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade912to9121.xml
9.1.1.x	<ReportsPackInteract>\cognos11\ InteractModel\upgrade911to9112.xml <ReportsPackInteract>\cognos11\ InteractModel\upgrade912to9121.xml
9.1.2.x	<ReportsPackInteract>\cognos11\ InteractModel\upgrade912to9121.xml
10.0.x	No Change in Interact Reports Model
10.1.x	No Change in Interact Reports Model

Chapter 9. Troubleshooting

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

  1.Drop the Index of USM_CONFIGURATIONDROP INDEX [USM_CONFIGURATION].IX_USM_CONFIGURATION;

  DROP INDEX [USM_CONFIGURATION[.IX1_USM_CONFIGURATION;

  DROP INDEX [USM_CONFIGURATION[.IX2_USM_CONFIGURATION;

  OR

  DROP INDEX IX_USM_CONFIGURATION;

  DROP INDEX IX1_USM_CONFIGURATION;

  DROP INDEX IX2_USM_CONFIGURATION;

  2. Create△ the Index for△USM_CONFIGURATION

  CREATE UNIQUE INDEX IX_USM_CONFIGURATION ON USM_CONFIGURATION (PARENT_ID asc, INTERNAL_NAME asc);

  CREATE UNIQUE INDEX IX1_USM_CONFIGURATION ON USM_CONFIGURATION (NS_THREAD asc, NS_LEFT asc);

  CREATE UNIQUE INDEX IX2_USM_CONFIGURATION ON USM_CONFIGURATION (NS_THREAD asc, NS_RIGHT asc);

- DB2 – Constraint violation errors: DB2 data migration from old base environment to 11.0 (clean environment) should be done with help of DBA. Before proceeding with upgrade steps y should ensure that all the database tables, constraints, indexes etc. are migrated successfully. For DB2 system tables import in clean 11.0 will cause issues with AUTO ID increment on certain tables. Due to these errors there will be related to constraint violation error.

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

  SELECT MAX(ID)+ 1 FROM USM_CONFIGURATION;

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

  SELECT MAX(ID)+ 1 FROM USM_ROLE;

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

  SELECT MAX(ID)+ 1 FROM USM_DB_RESOURCE_BUNDLE;

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

  SELECT MAX(ID)+ 1 FROM USM_AUDIT;

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

  SELECT MAX(ID)+ 1 FROM USM_ALERT;

  ALTER TABLE USM_ALERT ALTER COLUMN ID RESTART WITH NNNN;

  SELECT MAX(ID)+ 1 FROM USM_ALERT_SUBSCRIPTION;

  ALTER TABLE USM_ALERT_SUBSCRIPTION ALTER COLUMN ID RESTART WITH NNNN;

  SELECT MAX(ID)+ 1 FROM USM_NOTICE;

ALTER TABLE USM_NOTICE ALTER COLUMN ID RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_DASHBOARD;

ALTER TABLE USM_DASHBOARD ALTER COLUMN ID RESTART WITH
NNNN;

SELECT MAX(ID)+ 1 FROM USM_DASHBOARD_PORTLET;

ALTER TABLE USM_DASHBOARD_PORTLET ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_IFRAME_DET;

ALTER TABLE USM_DASH_PORT_IFRAME_DET ALTER COLUMN ID
RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_DASH_PORT_PREF_MAP;

ALTER TABLE USM_DASH_PORT_PREF_MAP ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_DASH_MANAGE_RIGHTS;

ALTER TABLE USM_DASH_MANAGE_RIGHTS ALTER COLUMN ID
RESTART WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_PORT_QUICKLINK_PREF;

ALTER TABLE USM_PORT_QUICKLINK_PREF ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_PERSONALIZATION;

ALTER TABLE USM_PERSONALIZATION ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 FROM USM_OBJECT_TYPE;

ALTER TABLE USM_OBJECT_TYPE ALTER COLUMN ID RESTART WITH
NNNN;

SELECT MAX(ID)+ 1 FROM USM_OBJECT_ATTR;

ALTER TABLE USM_OBJECT_ATTR ALTER COLUMN ID RESTART WITH
NNNN;

SELECT MAX(ID)+ 1 FROM USCH_TASK_NOTIFICATION;

ALTER TABLE USCH_TASK_NOTIFICATION ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(ID)+ 1 FROM USCH_RUN_NOTIFICATION;

ALTER TABLE USCH_RUN_NOTIFICATION ALTER COLUMN ID RESTART
WITH NNNN;

SELECT MAX(TASKID)+ 1 FROM USCH_TASK;

ALTER TABLE USCH_TASK ALTER COLUMN TASKID RESTART WITH
NNNN;

SELECT MAX(RUNID)+ 1 FROM USCH_RUN;

ALTER TABLE USCH_RUN ALTER COLUMN RUNID RESTART WITH NNNN;

SELECT MAX(RUNEXCLUSIONID)+ 1 FROM USCH_RUN_EXCLUSION;

ALTER TABLE USCH_RUN_EXCLUSION ALTER COLUMN
RUNEXCLUSIONID RESTART WITH NNNN;

SELECT MAX(ID)+ 1 from USM_ALERT_TYPE;

ALTER TABLE USM_ALERT_TYPE ALTER COLUMN ID RESTART WITH
NNNN

- DB2 – In case your DBA observed Marketing Platform system tables constraints are not imported in the 11.0 system database, then you can execute following query: It will create missing constraints. For constraints that are already present, it shows errors that can be ignored.

  Execute the script file: <PLATFORM_HOME> /db/ ManagerSchema_DB2_CreateFKConstraints.sql
- If the temp table is ON in the source DB, it can create to Temp table related issues in the target setup.
- The user DB used in Target setup should be the same as the source. If a different User DataSource is used, then the existing flowcharts will not get executed due to table mappings differences.
- Oracle export database schema using "exp" utility does not export tables with no rows.

  Note: Before executing these scripts, review them with your DBA, this approach is used by engineering, you can take the appropriate approach as suggested by your DBAs.

  In this case, you can execute the scripts underneath to enable the export of tables with no records.

  SELECT 'ALTER TABLE '||table_name||' ALLOCATE EXTENT;' FROM user_tables WHERE segment_created = 'NO';

  This script will provide SQL scripts as output that should be executed in the schema that needs to be exported.

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 Digital Analytics for On Premises product and system environment, which you can obtain as described in "System information."
- Information about how your Digital Analytics Accelerator solution was provisioned, delivered, and installed; and what, if any, modifications were made to the solution after installation.

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. If the version.txt file is not available, use the command **NetTracker admin -buildinfo** to obtain the version information.

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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