Version 11 Release 0.1
31 August, 2018

IBM Contact Optimization
Upgrade Guide

IBM

Contents

Chapter 1. Upgrade overview

An upgrade of Contact Optimization is complete when you upgrade and configure Contact Optimization. The Contact Optimization Upgrade Guide provides detailed information about upgrading and configuring Contact Optimization.

Use the *Upgrade roadmap* section to obtain a broad understanding about using the Contact Optimization Upgrade Guide.

Upgrade roadmap

Use the upgrade roadmap to quickly find the information that you need for upgrading Contact Optimization.

You can use the following table to scan the tasks that must be completed for upgrading Contact Optimization:

Table 1. Contact Optimization upgrade roadmap

Topic	Information
Chapter 1, "Upgrade overview"	This chapter provides the following information: • "How the installers work" on page 2 • "Modes of installation" on page 2 • "Contact Optimization documentation and help" on page 4
Chapter 2, "Planning the Contact Optimization upgrade," on page 7	This chapter provides the following information: • "Prerequisites" on page 7 • "Upgrade prerequisites for all IBM Marketing Software products" on page 10 • "Contact Optimization upgrade worksheet" on page 10
Chapter 3, "Upgrading Contact Optimization," on page 13	This chapter provides information about how to upgrade Contact Optimization.
Chapter 4, "Configuring Contact Optimization," on page 15	This chapter provides the following information: • "Registering Contact Optimization manually" on page 15 • "Mapping tables for Contact Optimization" on page 15 • "Verifying the Contact Optimization installation" on page 17
Chapter 5, "Uninstalling Contact Optimization," on page 19	This chapter provides information about how to uninstall Contact Optimization.
Chapter 6, "configTool," on page 21	This chapter provides information about how to use the **configTool** utility.

How the installers work

You must use the suite installer and the product installer when you install or upgrade any IBM® Marketing Software product. For example, for installing Contact Optimization, you must use the IBM Marketing Software suite installer and the IBM Contact Optimization installer.

Make sure that you use the following guidelines before you use the IBM Marketing Software suite installer and the product installer:

- The suite installer and the product installer must be in the same directory on the computer where you want to install the product. When multiple versions of a product installer are present in the directory with the master installer, the master installer always shows the latest version of the product on the IBM Marketing Software Products screen in the installation wizard.
- If you are planning to install a patch immediately after you install an IBM Marketing Software product, make sure that the patch installer is in the same directory as that of the suite and product installers.
- The default top-level directory for IBM Marketing Software installations is `/IBM/IMS` for UNIX or `C:\IBM\IMS` for Windows. However, you can change the directory 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 Contact Optimization.

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 Contact Optimization by using the graphical user interface.

Console mode

Use the console mode to install Contact Optimization 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 Contact Optimization 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 Contact Optimization. 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 Contact Optimization installer. For example, installer_uc*n.n.n.n*.properties is the response file of the Campaign 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

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.

Contact Optimization documentation and help

Contact Optimization provides documentation and help for users, administrators, and developers.

Use the following table to get information about how to get started with Contact Optimization:

Table 3. Get up and running

Task	Documentation
View a list of new features, known issues, and workarounds	*IBM Contact Optimization Release Notes*
Learn about the structure of the Contact Optimization database	*Contact Optimization System Tables and Data Dictionary*
Install or upgrade Contact Optimization	One of the following guides: • *IBM Contact Optimization Installation Guide* • *IBM Contact Optimization Upgrade Guide*

Use the following table to get information about how to configure and use Contact Optimization:

Table 4. Configure and use Contact Optimization

Task	Documentation
• Create Contact Optimization sessions • Configure the Contact Optimization process • Use optimized contacts in marketing campaigns	*IBM Contact Optimization User's Guide*

Use the following table to get information about how to get help if you face issues when you use Contact Optimization:

Table 5. Get help

Task	Instructions
• Troubleshoot Contact Optimization installation errors • Troubleshoot Contact Optimization session errors • Improve Contact Optimization performance	*IBM Contact Optimization Troubleshooting and Tuning Guide*
Open online help	1. Choose **Help > Help for this page** to open a context-sensitive help topic. 2. Click the **Show navigation** icon in the help window to display the full help. 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.

Table 5. Get help (continued)

Task	Instructions
Obtain PDFs	Use either of the following methods: • Choose **Help > Product documentation** to access Contact Optimization PDFs. • Choose **Help > All IBM Marketing Software suite documentation** to access all available documentation.
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 Contact Optimization upgrade

Upgrade your installation of Contact Optimization after understanding the guidelines that are specific to your current version of Contact Optimization.

Note: Versions of Contact Optimization previous to 9.x were named Optimize.

Use the following guidelines for upgrading Contact Optimization:

Table 6. Contact Optimization upgrade scenarios

Source version	Upgrade path
Versions 8.6.0 and later	Complete the following steps to upgrade Contact Optimization to version 11.0.1: 1. Upgrade to Contact Optimization version 10.0 by following the instructions in the Contact Optimization 10.0 Upgrade guide. 2. Perform an in-place upgrade to version 10.1. 3. Perform an in-place upgrade to 11.0.1 over your current version of Contact Optimization by following instructions in this guide.
Versions 10.0.0.x	Complete the following steps to upgrade Contact Optimization to version 11.0.1: 1. Perform an in-place upgrade to version 10.1. 2. Perform an in-place upgrade to 11.0.1 over your current version of Contact Optimization by following instructions in this guide.
Versions 10.1.x.x	Perform an in-place upgrade to 11.0.1 over your current version of Contact Optimization by following instructions in this guide.

Important: Contact Optimization and Campaign must be at the same version level. For example, you must upgrade Campaign to version 11.0.1 before you upgrade Contact Optimization to version 11.0.1.

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.

Important: For best performance, install Contact Optimization on its own system, where no other IBM Marketing Software products are installed. Contact Optimization requires significant computation and data processing resources. You have the greatest control and flexibility for performance-tuning if you operate Contact Optimization in a dedicated environment.

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.

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 performing a silent mode install, and you do not wish the system to prompt you for the SUDO Password, you could set a NOPASSWD for the SUDO user. If you do not set it, you are then prompted for the SUDO Password. For Windows installation - You can add the IBM Contact Optimization installation user to the administrators group.

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 requirement

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

Campaign requirement

You must install or upgrade and configure Campaign before you install or upgrade Contact Optimization.

Note: For installations on UNIX, you might need to set the **Djava.awt.headless** property to `true` in your web application server. The setting is required only when you are unable to view Contact Optimization reports. See the *IBM Campaign Installation Guide* for details.

You do not need to prepare any additional data sources for Contact Optimization because Contact Optimization uses the Campaign system tables data source.

Upgrade prerequisites for all IBM Marketing Software products

Meet all requirements for permissions, operating system, and knowledge correctly before you upgrade Contact Optimization 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 Contact Optimization 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 Contact Optimization, 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.

Contact Optimization upgrade worksheet

Use the Contact Optimization upgrade worksheet to gather information about the database that contains your Contact Optimization upgrade system tables and about other IBM Marketing Software products that are required for upgrading Contact Optimization.

Campaign database information

The installation wizard for Contact Optimization must access the Campaign system table database to create the Contact Optimization tables. You must collect the following information about your Campaign installation to allow the installer to set up database tables and properly configure Contact Optimization:

Table 7. Database information worksheet

Database information	Notes
Check whether the Campaign database is configured for Unicode	
Campaign database type If the database type is DB2® and is installed on a UNIX system, note DB2 instance path. If the database type is Oracle, note the Oracle home directory path.	
Campaign database host name	
Campaign database port	
Campaign database name	
User name for the Campaign database account	
Password for the Campaign database account	
JDBC connection URL to the Campaign database The installer provides the connection URL based on the values you provide, however, confirm that the URL is correct. For example, for SQL Server, the JDBC connection URL takes the following format: jdbc:sqlserver://*your_db_host:your_db_port*;databaseName=*your_db_name*	
The name of the system on which the Campaign web application server is installed.	
The port on which the Campaign application server listens. If you plan to implement SSL, obtain the SSL port.	
The network domain for your deployment system.	

Note: If you have Contact Optimization and Campaign on separate systems, you do not need to mount the Campaign directory for your Campaign installation as a network drive on the system that hosts Contact Optimization. Make sure that `CAMPAIGN_HOME` is pointing to `OPTIMIZE_HOME` in `ACOServer.bat/.sh`. This variable is retained for compatibility purposes and is set to `OPTIMIZE_HOME`. Do not alter the value of this variable.

Marketing Platform database information

The Contact Optimization installation wizard must be able to access the Marketing Platform system table database to register the product.

Each time that you run the IBM Marketing Software installer, you must enter the following database connection information for the Marketing Platform system table database:

- Database type
- Database host name
- Database port
- Database name
- User name and password for the database account
- JDBC connection URL to the Marketing Platform database

The installer provides the connection URL based on the values that you provide. However, you must confirm that the URL is correct.

Chapter 3. Upgrading Contact Optimization

You can upgrade Contact Optimization by overwriting your existing Contact Optimization installation.

Important notes for Contact Optimization users

You must upgrade Campaign and Contact Optimization together. If you do not want to upgrade Campaign and Contact Optimization together, you must stop the Contact Optimization listener manually.

Important notes for users who have installed IBM Contact Optimization listener and IBM Campaign on separate machines:

If IBM Contact Optimization listener and IBM Campaign analytical server is installed on a separate machines, and if you are upgrading Contact Optimization with the non-root user permissions, then you have to add the user into the Sudo list for the GSKIT components to be installed successfully.

During the interactive installation process, you will be prompted to enter SUDO password for the non-root user. On providing the SUDO password, the installation would be completed and the GSKIT Components would be installed successfully.

If you are performing silent mode installation, and you do not want the system to prompt you for the SUDO Password, you could set NOPASSWD to the sudo user. If you do not set NOPASSWD to the sudo user, then you would still be prompted for the SUDO Password.

However, if the user is not in SUDO list then the Contact Optimization installer would still prompt you for the SUDO Password and the GSKIT components would not be installed. In this case user has to install GSKIT manually by running the **$Optimize_Home/bin/IBM_Campaign_Crypto.bin** utility with the root user permissions.

In case of Windows operating system, if the installation user is not an administrator, then the user has to manually run **$Optimize_Home/bin/IBM_Campaign_Crypto.exe** utility with the administrator user role to install the GSKIT components. You could check the GSKIT installation related logs in the ContactOptimization_stdout.log file.

Complete the following steps to upgrade Contact Optimization:

1. Stop the Contact Optimization listener. Before you stop the Contact Optimization listener, make sure that you set the path to *CAMPAIGN_HOME* correctly in the **ACOServer** script.

   Use the **ACOServer** script to stop the Contact Optimization listener. The **ACOServer** script is in the bin directory of the Contact Optimization installation.

   Run the following command to stop the Contact Optimization listener:

   - On Windows: **ACOserver.bat stop**
   - On UNIX: **./ACOserver.sh stop**

2. Back up the Campaign and Contact Optimization home directories.
3. Back up the Campaign and Marketing Platform system tables.

4. Run the IBM Marketing Software installer and select **Contact Optimization**.

   Important: Select your previous Contact Optimization installation directory, for example `C:\IBM\ContactOptimization`.

   When prompted, select the **Automatic database setup**. If you select **Manual database setup**, you must run the Contact Optimization Migration SQL scripts against the appropriate database to create and populate the Contact Optimization system tables manually.

5. Start the web application server on which Campaign is deployed, if it is not already running.

6. Start the Contact Optimization listener.

   Use the **ACOServer** script to start the Contact Optimization listener.

   Run the following command to start the Contact Optimization listener:
   - On Windows: **ACOserver.bat start**
   - On UNIX: **./ACOserver.sh start**

7. Complete the following steps for all Contact Optimization sessions that use session level advanced settings:

   a. Edit the session level advanced settings of the Contact Optimization session.

   b. Save the session level settings.

   Saving the settings ensures that the session level advanced settings of the current Contact Optimization session are retained during the upgrade. If you do not save the advanced settings, the following properties might behave as if they are set to `False`, even if they are set to `True`:
   - **ContinueOnGenerationLoopError**
   - **Enable Max Capacity Consumption**
   - **Update Session Table Statistics**

Chapter 4. Configuring Contact Optimization

Contact Optimization does not have a stand-alone web application. Configure Contact Optimization after you install, configure, deploy, and verify your installation of Campaign.

Registering Contact Optimization manually

Register Contact Optimization with Marketing Platform to import menu items and set configuration properties. If the Contact Optimization installer cannot access the Marketing Platform system tables during the installation process, you must run the **configTool** utility to register Contact Optimization manually.

You must run the **configTool** utility as many times as there are files. The **configTool** utility is in the tools/bin directory under the Marketing Platform installation.

Use the following example commands as guidelines to register Contact Optimization manually:

* **configTool -i -p "Affinium|suite|uiNavigation|mainMenu|Campaign" -f "*full_path_to_Optimize_installation_directory*\conf\ optimize_navigation.xml"**
* **configTool -v -i -o -p "Affinium|Campaign|about|components" -f "*full_path_to_Optimize_installation_directory*\conf\ optimize_subcomponent_version.xml"**

All the Contact Optimization configuration properties are included with Campaign, so you do not have to register any configuration properties.

Mapping tables for Contact Optimization

You can exchange data between Contact Optimization and Campaign by mapping the Contact Optimization system tables, contact history tables, and segment membership tables to the Campaign tables.

Note: Mapping the segment membership system tables in Campaign for use with strategic segments is optional. Map the segment membership system table for an audience only if you use the audience with flowcharts or Contact Optimization sessions that use strategic segments.

For more information about mapping system tables in Campaign, see the *IBM Campaign Administrator's Guide*.

Complete the following steps to map tables for Contact Optimization:

1. Map all system tables.
2. Map all contact history tables.

   Confirm that each audience level in your Campaign configuration has a contact history table. You must map each contact history table. For more information about additional contact history tables, see the *IBM Campaign Administrator's Guide*.

3. Optional: For each audience used in Contact Optimization sessions that use strategic segments, map the segment membership system table for the audience to the database table that defines the segment members.

Requirements when you use strategic segments:

If you plan to use strategic segments, ensure that there is a segment membership table for each audience level in your Campaign configuration. You must map each segment membership table.

Create two indexes on the audience segment membership tables. Create the first index on SegmentID and create the second on the audience level columns. The `UA_SegMembership` table ships with an index on CustomerID and on SegmentID.

For more information about system tables and strategic segments, see the *IBM Campaign Administrator's Guide*.

Contact Optimization system table mapping reference

To integrate Contact Optimization with Campaign, map all the Contact Optimization system tables to the Campaign tables.

You can exchange data between Contact Optimization and Campaign by mapping the Contact Optimization tables in Campaign. Map all the Contact Optimization system tables, contact history tables, and segment membership tables to the Campaign tables.

Use the following table to get information about the Contact Optimization system tables and the corresponding database tables:

Table 8. Contact Optimization system table mapping

Contact Optimization System Table	Database Table
Optimize Session Table	UACO_OptSession
Optimize Process Table	UACO_OptimizeProcess
Optimize Run History Table	UACO_SesnRunHist
Optimize Session Segment Table	UACO_SesnSegment
Optimize Offer Segment Table	UACO_OfferSeg
Optimize Session Offer Table	UACO_SesnOffer
Optimize Rule Table	UACO_Rule
Optimize Exception Rule Table	UACO_RException
Optimize Exception Rules Constraint Table	UACO_RExConstraint
Optimize Rules Constraint Table	UACO_RConstraint
Optimize Rule OfferList Table	UACO_ROfferList
Optimize Rule Offer Table	UACO_ROffer
Optimize Rule Segment Table	UACO_RSegment
Optimize Proposed Contact Base Table	UACO_PCTBase
Optimize Proposed Attribute Base Table	UACO_POABase
Optimize Optimized Contact Base Table	UACO_OCTBase

Contact Optimization contact history table mapping reference

To integrate Contact Optimization with Campaign, map all the Contact Optimization contact history tables to the Campaign tables.

Use the following table to get information about the Contact Optimization contact history tables and the corresponding database tables:

Table 9. Contact Optimization contact history table mapping

Contact History Table	Database Table
Customer Contact History Table	UA_ContactHistory
Customer Detailed Contact History Table	UA_DtlContactHist

The names of additional audience level tables are unique according to your configuration of Contact Optimization.

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.

Verifying the Contact Optimization installation

If Contact Optimization is installed correctly, you must be able to use the Optimize process in Campaign when you build the Campaign batch flowcharts. To verify, log in to IBM Marketing Software and confirm that you can access **Campaign** > **Contact Optimizations**.

Note: Before you verify that Contact Optimization is installed or upgraded correctly, make sure that the **Affinium|Campaign|acoInstalled** property is set to `true`. If the **Affinium|Campaign|acoInstalled** is set to `false`, you get an error message that indicates Contact Optimization is not installed.

After you map the Contact Optimization tables to the Campaign tables, you might have to log out and log in to the IBM Marketing Software console to show **Campaign** > **Contact Optimizations**.

Complete the following steps to verify the Contact Optimization installation:

1. Log in to the IBM Marketing Software console.
2. Select **Campaign** > **Contact Optimizations** from the menu. The **All Contact Optimization sessions** page is displayed. Verify that you can view and manage your Contact Optimization sessions.

Chapter 5. Uninstalling Contact Optimization

Run the Contact Optimization uninstaller to uninstall Contact Optimization. When you run the Contact Optimization 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 Contact Optimization must run the uninstaller.

1. Stop the Contact Optimization listener.
2. To drop the Contact Optimization tables from the system table database, run the **aco_systab_drop.sql** script in the `ddl` directory under your Contact Optimization installation. 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.
3. Complete one of the following steps to uninstall Contact Optimization:
   - Click the Contact Optimization uninstaller that exists in the `Uninstall_Product` directory. The uninstaller runs in the mode in which you installed Contact Optimization.
   - In a command-line window, navigate to the directory where the uninstaller exists, and run the following command to uninstall Contact Optimization 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 Contact Optimization by using the silent mode:

     Uninstall_*Product* -i silent

     When you uninstall Contact Optimization 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 Contact Optimization, the Contact Optimization uninstaller runs in the mode in which Contact Optimization is installed.

Chapter 6. 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 10. 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

Table 10. Product names for configTool registration and unregistration (continued)

Product name	Name used in configTool
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

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.

Notices

This information was developed for products and services offered in the U.S.A.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

Intellectual Property Licensing
Legal and Intellectual Property Law
IBM Japan, Ltd.
19-21, Nihonbashi-Hakozakicho, Chuo-ku
Tokyo 103-8510, Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

IBM Corporation
B1WA LKG1
550 King Street
Littleton, MA 01460-1250
U.S.A.

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, the results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurements may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

All statements regarding IBM's future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

All IBM prices shown are IBM's suggested retail prices, are current and are subject to change without notice. Dealer prices may vary.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating

platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. The sample programs are provided "AS IS", without warranty of any kind. IBM shall not be liable for any damages arising out of your use of the sample programs.

If you are viewing this information softcopy, the photographs and color illustrations may not appear.

Trademarks

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at www.ibm.com/legal/copytrade.shtml.

Privacy Policy and Terms of Use Considerations

IBM Software products, including software as a service solutions, ("Software Offerings") may use cookies or other technologies to collect product usage information, to help improve the end user experience, to tailor interactions with the end user or for other purposes. A cookie is a piece of data that a web site can send to your browser, which may then be stored on your computer as a tag that identifies your computer. In many cases, no personal information is collected by these cookies. If a Software Offering you are using enables you to collect personal information through cookies and similar technologies, we inform you about the specifics below.

Depending upon the configurations deployed, this Software Offering may use session and persistent cookies that collect each user's user name, and other personal information for purposes of session management, enhanced user usability, or other usage tracking or functional purposes. These cookies can be disabled, but disabling them will also eliminate the functionality they enable.

Various jurisdictions regulate the collection of personal information through cookies and similar technologies. If the configurations deployed for this Software Offering provide you as customer the ability to collect personal information from end users via cookies and other technologies, you should seek your own legal advice about any laws applicable to such data collection, including any requirements for providing notice and consent where appropriate.

IBM requires that Clients (1) provide a clear and conspicuous link to Customer's website terms of use (e.g. privacy policy) which includes a link to IBM's and Client's data collection and use practices, (2) notify that cookies and clear gifs/web beacons are being placed on the visitor's computer by IBM on the Client's behalf along with an explanation of the purpose of such technology, and (3) to the extent required by law, obtain consent from website visitors prior to the placement of cookies and clear gifs/web beacons placed by Client or IBM on Client's behalf on website visitor's devices

For more information about the use of various technologies, including cookies, for these purposes, See IBM's Online Privacy Statement at: http://www.ibm.com/ privacy/details/us/en section entitled "Cookies, Web Beacons and Other Technologies."

IBM ®

Printed in USA