

IBM Contact Optimization  
Version 9 Release 1.1  
November 26, 2014

*Upgrade Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 27.

This edition applies to version 9, release 1, modification 1 of IBM Contact Optimization and to all subsequent releases and modifications until otherwise indicated in new editions.

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## 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.

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### 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: <ul style="list-style-type: none"><li>• "How the installers work" on page 2</li><li>• "Modes of installation" on page 2</li><li>• "Contact Optimization documentation and help" on page 3</li></ul>
Chapter 2, "Planning the Contact Optimization upgrade," on page 5	This chapter provides the following information: <ul style="list-style-type: none"><li>• "Prerequisites" on page 5</li><li>• "Upgrade prerequisites for all IBM EMM products" on page 7</li><li>• "Contact Optimization upgrade worksheet" on page 8</li></ul>
Chapter 3, "Upgrading Contact Optimization," on page 11	This chapter provides information about how to upgrade Contact Optimization.
Chapter 4, "Configuring Contact Optimization," on page 13	This chapter provides the following information: <ul style="list-style-type: none"><li>• "Registering Contact Optimization manually" on page 13</li><li>• "Mapping tables for Contact Optimization" on page 13</li><li>• "Verifying the Contact Optimization installation" on page 15</li></ul>
Chapter 5, "Uninstalling Contact Optimization," on page 17	This chapter provides information about how to uninstall Contact Optimization.
Chapter 6, "configTool," on page 19	This chapter provides information about how to use the <b>configTool</b> utility.

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## How the installers work

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

Make sure that you use the following guidelines before you use the IBM EMM 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 EMM Products screen in the installation wizard.
- If you are planning to install a patch immediately after you install an IBM EMM 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 EMM installations is /IBM/EMM for UNIX or C:\IBM\EMM for Windows. However, you can change the directory during installation.

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## Modes of installation

The IBM EMM 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.

### 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.

## 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 EMM master installer.
installer_product initials and product version number.properties	The sample response file for the Contact Optimization installer.  For example, installer_ucn.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.properties is the response file of the Campaign reports pack installer.

## 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	<i>IBM Contact Optimization Release Notes</i>
Learn about the structure of the Contact Optimization database	<i>Contact Optimization System Tables and Data Dictionary</i>
Install or upgrade Contact Optimization	One of the following guides: <ul style="list-style-type: none"> <li>• <i>IBM Contact Optimization Installation Guide</i></li> <li>• <i>IBM Contact Optimization Upgrade Guide</i></li> </ul>

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

Table 4. Configure and use Contact Optimization

Task	Documentation
<ul style="list-style-type: none"> <li>• Create Contact Optimization sessions</li> <li>• Configure the Contact Optimization process</li> <li>• Use optimized contacts in marketing campaigns</li> </ul>	<i>IBM Contact Optimization User's Guide</i>

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
<ul style="list-style-type: none"> <li>• Troubleshoot Contact Optimization installation errors</li> <li>• Troubleshoot Contact Optimization session errors</li> <li>• Improve Contact Optimization performance</li> </ul>	<p><i>IBM Contact Optimization Troubleshooting Guide</i></p>
Open online help	<ol style="list-style-type: none"> <li>1. Choose <b>Help &gt; Help for this page</b> to open a context-sensitive help topic.</li> <li>2. Click the <b>Show Navigation</b> icon in the help window to display the full help.</li> </ol>
Obtain PDFs	<p>Use either of the following methods:</p> <ul style="list-style-type: none"> <li>• Choose <b>Help &gt; Product Documentation</b> to access Contact Optimization PDFs.</li> <li>• Choose <b>Help &gt; All IBM EMM Suite Documentation</b> to access all available documentation.</li> </ul>
Get support	<p>Go to <a href="http://www.ibm.com/support">http://www.ibm.com/support</a> to access the IBM Support Portal.</p>



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## 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
Version 7.3.0 and later	Complete the following steps to upgrade Contact Optimization: 1. Upgrade to Contact Optimization version 9.1.0. 2. Perform an in-place upgrade from version 9.1.0 to 9.1.1.
Version 9.1.0	Perform an in-place upgrade over your current version of Contact Optimization. <b>Important:</b> Contact Optimization and Campaign must be at the same version level. For example, you must upgrade Campaign to version 9.1.1 before you upgrade Contact Optimization to version 9.1.1.

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### Prerequisites

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

#### System requirements

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

#### Network domain requirements

The IBM EMM 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 EMM 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 EMM applications within a suite must be deployed on a dedicated Java™ virtual machine (JVM). IBM EMM 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 EMM products.

## Knowledge requirements

To install IBM EMM 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 EMM 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/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, `rwrxr-xr-x`.

## JAVA\_HOME environment variable

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

Make sure that the **JAVA\_HOME** environment variable points to JRE 1.7. If the **JAVA\_HOME** environment variable points to an incorrect JRE, you must clear the **JAVA\_HOME** variable before you run the IBM EMM 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.

**export JAVA\_HOME=** (leave empty)

After the environment variable is cleared, the IBM EMM installers use the JRE that is bundled with the installers. You can reset the environment variable after the installation is complete.

## Marketing Platform requirement

You must install or upgrade Marketing Platform before you install or upgrade any IBM EMM 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.

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## Upgrade prerequisites for all IBM EMM 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.

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## 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 EMM 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:  <code>jdbc:sqlserver://your_db_host:your_db_port;databaseName=your_db_name</code>	
The name of the system on which the Campaign web application server is installed.	

Table 7. Database information worksheet (continued)

Database information	Notes
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 EMM 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.



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## Chapter 3. Upgrading Contact Optimization

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

### About this task

**Note:** 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.

You can complete in-place upgrades for Contact Optimization 9.1.0. An in-place upgrade is one where you overwrite your existing installation.

Complete the following steps to upgrade Contact Optimization:

### Procedure

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 EMM 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**



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## 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.

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### 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.

#### About this task

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.

#### About this task

**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:

#### Procedure

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

Confirm 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*.

- 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.

---

## 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 EMM and confirm that you can access **Campaign > Contact Optimizations**.

### Before you begin

**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.

### About this task

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

Complete the following steps to verify the Contact Optimization installation:

### Procedure

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



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## 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.

### About this task

When you install IBM EMM 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.

### Procedure

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:
  - Double-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.



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## Chapter 6. configTool

The properties and values on the Configuration page are stored in the 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 EMM 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 EMM.
- 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 EMM, 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
CustomerInsight	Insight
Digital Analytics for On Premises	NetInsight
Opportunity Detect	Detect
Leads	Leads
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
```



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- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
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