Infor Omni-Channel Campaign Management Implementation Guide for Inbound Channels

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Introduction

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About this Guide

Infor Campaign Management still offers the modern architecture and scalability seen in earlier releases of Infor Campaign Management, with the addition of Inbound Channels by integration with Infor Interaction Advisor. Infor Campaign Management now offers the integration of outbound and inbound marketing channels. Infor Campaign Management offers a single solution where an end user can build both inbound and outbound marketing campaigns for execution.

This Infor Enterprise Marketing Suite Implementation Guide provides the steps required for proper implementation of Infor Campaign Management in order to utilize inbound channels. It is intended for database administrators who install, configure, and maintain Infor Campaign Management and Infor Interaction Advisor. This guide is designed to be used in conjunction with these products' respective Release Notes and Implementation Guides as well as Infor Interaction Advisor Installation Guide.

Infor Campaign Management

Infor Campaign Management are based on a modern architecture that provides scalability to billions of records to handle large enterprise requirements. It delivers the high performance necessary to scale up to thousands of users while delivering fast, interactive response times.

The Infor Campaign Management multi-tier architecture employs an ultra-thin web browser client, a middle-tier application server implemented in Java, and an underlying industry-standard relational database server. This architecture enables Infor Campaign Management to integrate customer data from a wide variety of sources to provide a comprehensive view of customers and their behavior.

Note: Campaigns for Infor Interaction Advisor must be created and maintained using the Unified UI available in Infor Omni-channel Campaign Management.

Infor Campaign Management Product Documentation

The Infor Campaign Management product documentation includes four manuals and two online help systems. Each of these manuals is updated whenever needed. Most are updated for each maintenance release, but occasionally one or two will not need updating, and thus bear an earlier version number. If you are not sure whether or not you have all the correct documentation for the release your company purchased, contact Infor Customer Support.

Installation Guide

The *Infor Campaign Management Installation Guide* is intended for database administrators who install, configure, and maintain the Infor Campaign Management. The Guide is designed to be used in conjunction with our product release notes, plus the appropriate installation and configuration manuals for your existing hardware and software. Depending on the database server platform you select, these manuals can be:

DB2 on AIX	Quick Beginnings: DB2 for UNIX and DB2 Administration Guide, Volumes 1 through 3. Or, the Installation Guide and the Performance Management Guide for AIX.
Oracle	The appropriate installation guide for Oracle on your operating system. Or, the installation guide for your operating system if that operating system is not pre installed. The instructions for configuring kernel resources such as Net Configuration Assistant, or Oracle9i Reference.
SQL Server	SQL Server Administration Guide, or the appropriate administration guide for your Windows version.
All platforms	The installation and configuration instructions for your RAID disk-management equipment and software.

Note: Please follow the configuration recommendations that are suggested in this guide. If specific instructions do not appear for a particular configuration step or option, default values are acceptable.

Data Mart Implementation Guide

The *Infor Campaign Management Data Mart Implementation Guide* provides in-depth technical information on how to configure and populate the data mart used by all Infor Campaign Management applications, including Infor Interaction Advisor applications.

Topic Implementation Guide

Formerly titled Configuring Applications, the *Infor Campaign Management Topic Implementation Guide* is intended for implementers and Professional Services personnel who creates the applications that run on an Infor Campaign Management EpiCenter. The guide summarizes Infor Campaign Management functionality, architecture, and administration, and provides in-depth technical information on how to configure the Infor Campaign Management topics required for campaign management and analysis.

Viewing Release Notes and Manuals Online

You can view our product documentation and Release Notes on any machine that has Acrobat Reader running.

When you install documentation on Windows, the installation wizard adds shortcuts to the Windows Start menu for easy viewing access. Documentation is installed in a directory that matches the current version number. The directory default location is the following:

`<Infor Campaign Management installation directory>\ConfigFiles\Docs\<locale>`

Some additional EM documentation and templates are located in the following default location:

<Infor Campaign Management installation directory>\Email Marketing\docs

For example, to view the installed documentation for Infor Omni-Channel Campaign Management 10.1

1 Navigate to **Start > Programs > Infor > Marketing > 10.0.2 > Documentation > Infor Campaign Management > <locale>**.

2 Choose Documentation.

Installing Documentation on a Unix Host

1 Copy `Supplemental_Files_<locale>_1000_unix.tar` to a local directory.

2 Navigate to that directory and enter the following commands to unpack the PDF files (substituting the appropriate two-letter abbreviation for <locale>):

```
tar -xvf Supplemental_Files_<locale>_1000_unix.tar
        gunzip Supplemental_<locale>tar.gz
        tar -xvf Supplemental_<locale>.tar
```

Viewing Release Notes and Manuals Online

You can view the product documentation and Release Notes on any machine that has Acrobat Reader running.

When installing documentation on Windows, the installation wizard adds shortcuts to the Windows **Start** menu for easy viewing access. Documentation is installed in a directory that matches the current version number. The directory default location is: `C:\Program Files\Infor\Infor_Campaign_Management\ConfigFiles\Docs\<locale>`.

Some additional Infor Email Marketing documentation and templates are located in: `C:\Program Files\Infor\Infor_Campaign_Management\EM\docs`.

For example, to view the installed documentation for Infor Campaign Management, you can usually navigate to **Start > Programs > Infor > 10 > Documentation > Infor Campaign Management > <locale>(depending upon where Marketing was installed)**

Choose either **Documentation** or **Release Notes** .

Printing This Document

Best print quality is achieved by printing this document with a PostScript driver. Other drivers may not reproduce screen shots accurately.

Contacting Customer Support

You may contact the Infor Customer Support center by submitting your incident via the web 24x7 at http://www.inforxtreme.com, or by placing a call during our scheduled business hours. For a complete listing of our support centers with web addresses and phone numbers, access our support site at http://www.inforxtreme.com.

Infor Campaign Management

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Enabling Integration in Infor Campaign Management

Prior to enabling Infor Interaction Advisor Integration, a new EpiMeta needs to be initialized or registered. The integration cannot be enabled prior to an EpiMeta being initialized. Reference the *Infor Campaign Management Implementation Guide* for assistance with initializing an EpiMeta database.

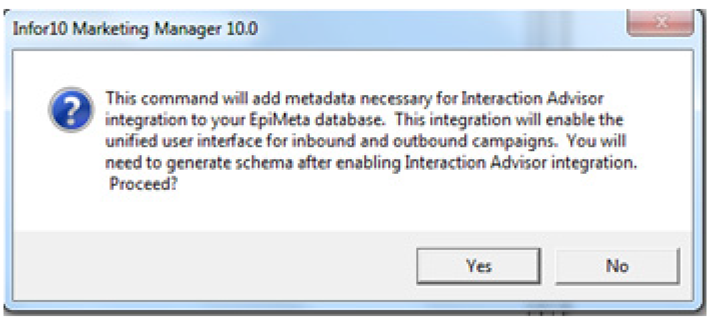


Figure 1: EpiMeta Registration

After the EpiMeta database has been registered, the Infor Interaction Advisor can then be enabled.

1 Open Admin Manager .
2 On the top toolbar, select **Tools**.
   a From the **Tools** drop down menu, select **Miscellaneous**.
   b From the **Miscellaneous** drop down, select **Enable IA Integration**.
   c A windows message will appear advising you that you are about to add the necessary metadata for the Infor Interaction Advisor Integration. Please click **Yes**, to proceed.

Confirming Integration is Enabled

You can also confirm that the EpiMeta database you already have initialized and open has integration properly enabled.

1 Open Admin Manager, and open the EpiMeta database.

2 On the top toolbar, select EpiCenter

a From the EpiCenter menu, select Configuration.

b Within the Configuration window, ensure you have the Settings tab selected.

c Expand/Open the External Interfaces folder

- Expand/Open the Personalization folder

3 If integration has been properly enabled, a key called ‘IntegrationEnabled’ exists, if this key does not exist, the IA integration is not properly enabled.

- Next, look at the value of this key, if the key value is set to 1, then the integration has been properly enabled.

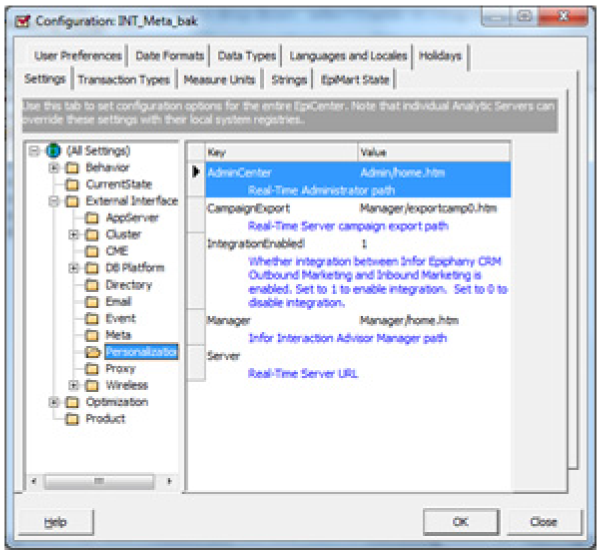


Figure 2: IA Integration Enabled Verfication

Configure Navigation Nodes

After the Integration has been enabled, you need to edit the navigation nodes to ensure your pages navigate appropriately.

A navigation node is a potential destination that a user can visit. If an actual destination (a web page) has been assigned to a node, that destination is shown within the web page contents. Some nodes already have destinations assigned to them. Follow the steps below to configure the navigation nodes.

1 Locate the Meta folder for the Server where you have installed Infor Campaign Management. This will be to root folder on the panel within the Admin Manager.

2 Expand the **Presentation** topic:

a Expand Topics.

b Choose you campaign management topic and double click the topic name.

3 On the **General** tab, ensure **Campaign Management Template** is selected in the **Template Topic** drop down.
4 Click on the **Update** button to update the topic.
5 Within the **Topic Update Options**, click on the **Update** button
6 A dialog box appears, and you will want to review and ensure that ‘Create Nav Nodes’ and ‘Create Nav Links’ are selected within this dialog box. Also ensure that the 'Delete Nav links in this topic' is unchecked:

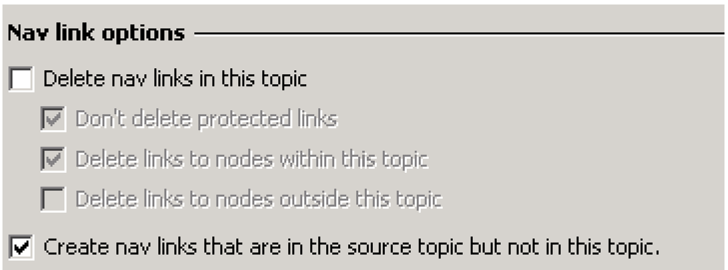


Figure 3: Nav Link Options

7 Now click **OK** to close the update window.

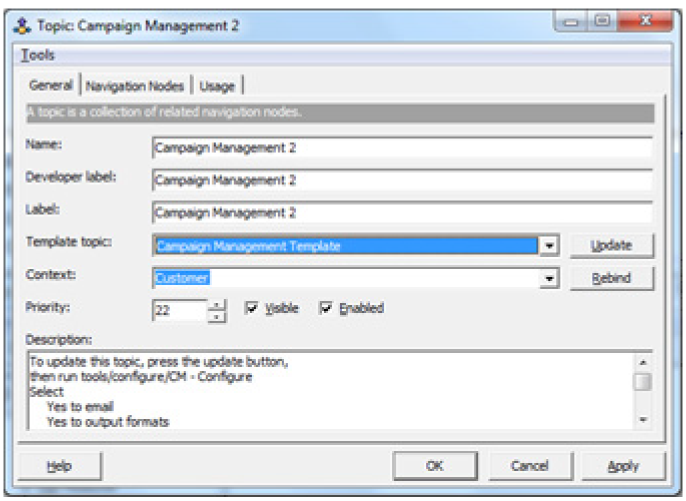


Figure 4: Topic Update Options

CM Configuration

1 Within the Infor Campaign Management topic window, locate the **Tools** menu on the top toolbar.
2 Click on **Tools**:
   a From the **Tools** drop down menu, select **CM-Configure**.
3 A CM Configure window appears with a categorized listing of the current configuration.
4 Within the Personalization Pages category, choose **Visible**.

5 Ensure that both check box for **Make topic list only** is unchecked.
6 Click on **OK**.
7 Click on **OK** within the Infor Campaign Management topic window to close that window and return to the Admin Manager screen.

Settings for View Package Navigation Node

1 Double click on your campaign management topic to open it, and navigate to the Navigation Nodes tab.
2 A grid listing of the navigation nodes is located in the bottom panel, scroll down to View Package and click on the **Edit** button to edit the **View Package navigation** node.
3 Under the **General** tab verify that the Node type selected is **Package**.
4 In the section for Web page binding, two options can exist for this installation:
   - If **Bind to a single web page** is selected, then ensure that a campaign management web page is listed/selected in the drop down box immediately below.
   - If **Bind to different webpages per dimension** is selected, then ensure that a campaign management web page is selected for each applicable dimension depending on the availability of webpages

5 Click **OK** to close the View Package navigation node, you will return to the campaign management topic window.

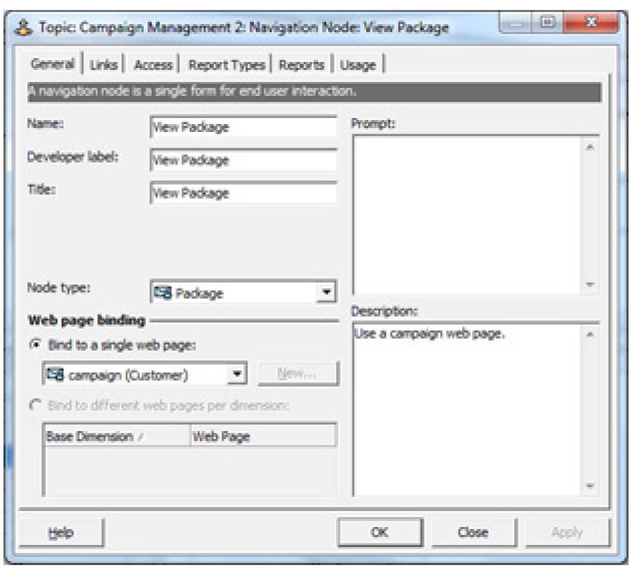


Figure 5: Campaign Management Topic Window

After you have successfully updated the navigation nodes on your campaign management topic, you need to ensure that all new nodes are bound to the appropriate web pages.

Settings for Program - Specify Navigation Node

1. Within the Infor Campaign Management topic window, scroll down to the **Program - Specify navigation node** item and double click to edit it.
2. Verify that the Node type selected is **Program**.
3. In the section for Web page binding, two options can exist for this installation:
   - If **Bind to a single web page** is selected, then ensure that a campaign management web page is listed/selected in the drop down box immediately below.
   - If **Bind to different webpages per dimension** is selected, then choose the webpage for each applicable dimension and click **OK**.
4. Click **OK** to close the Program - Specify navigation node window.

Settings for APCM Definition Links Navigation Node

1. Within the Infor Campaign Management topic window, a spreadsheet listing of the navigation nodes is located in the bottom panel. Scroll down to the item '**APCM Definition Links**' and double click to edit the APCM Definition Links navigation node.
2. Click on **Links** tab.
3. Within the Links list box, scroll down to New Program and Open an existing program and double click to open each navigation link.
4. Within the **Options** section, located on the bottom right, ensure that the **Visible** and **Enabled** check boxes are selected.
5. Click **OK**.
6. Click **OK** to close the APCM Definition Links window.
7. Close all navigation links, navigation nodes and topics.

Configure Campaign Web Pages

Infor Campaign Management sends economic information to the Infor Interaction Advisor Server based on values specified for financial columns in a campaign definition. To allow values to be specified for financial columns, you must add attributes corresponding to those columns to the appropriate attribute roles for any Campaign web page that is used for Inbound campaigns.

The financial columns that must be added are found in the Cell dimension, and they can be added to an attribute role by adding the corresponding built-in Infor Campaign Management attributes. The columns are mapped to Infor Interaction Advisor economic attributes as follows:

Infor Interaction Advisor Economic Attribute	Cell dimension column	Built-in Infor Omni-Channel Campaign Management Attribute
Benefit	est_cell_benefit	Cell Estimated Benefit
Revenue	est_cell_revenue_per_response	Cell Estimated Revenue Per Response
Profit Margin	est_cell_profit	Cell Estimated Profit
Extension Cost	treatment_unit_cost	Cell Communication Unit Cost
Acceptance Cost	est_cell_cost_per_response	Cell Estimated Cost Per Response
Cost Capacity	est_cell_cost_capacity	Cell Estimated Cost Capacity

To add the appropriate attributes, do the following:

1. For each Campaign web page that is used for Inbound campaigns, open the Web Page dialog box for that web page.
2. Go to the Attributes tab of the Web Page dialog box.
3. Choose the appropriate attribute role from the drop-down at the top of the left pane. If values are set per cell, select one of the Cell attribute roles. If values are set per communication, choose one of the Communication attribute roles. If the marketer is required to enter a value, choose the Required version of the attribute role. If the marketer will not be required to enter a value (with 0 used when a value is not specified), choose the Optional version of the attribute role. So, for example, if values will be set per communication and will be required, choose Required Communication Attributes.
4. Drag the appropriate Attributes from the Object Gallery to the Attributes pane on the left.
5. Repeat steps 3-4 for all economic attributes.

   If an attribute for a financial column is not added to a Campaign web page, then Infor Campaign Management uses a value of 0 for the corresponding Infor Interaction Advisor economic attribute.

Run Scrutiny and Restart the Campaign Management Server

- Run Scrutiny to make sure there are not any other issues with web page bindings and missing navigation links, and so on.
- Restart the Infor Campaign Management server to reflect the changes made to Admin Manager from the front end:

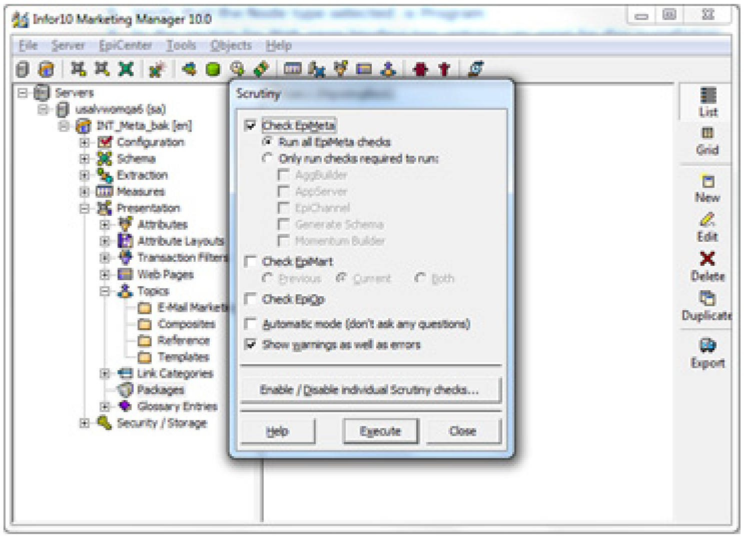


Figure 6: Scrutiny

The EpiMeta Database is now registered, the Infor Interaction Advisor Integration is enabled, the navigation nodes have been set up, and Scrutiny has checked for errors. Your database is now ready to start accepting Infor Interaction Advisor content. Please proceed with the next steps to ensure Infor Interaction Advisor content is imported properly.

Creating a Package in Admin Manager

Before Infor Campaign Management can receive any information from Infor Interaction Advisor, Marketing has to be ready to handle the information within the Infor Interaction Advisor Package. The next steps will walk you through how to create a package in admin manager which ultimately holds the IA data necessary for proper communication between the two systems.

The **Packages** folder is a new folder that has been created for Infor Campaign Management, and is located within the tree structure of Admin Manager.

Note: Ensure you have Oracle.Dataaccess.dll registered before proceeding, if you are using Oracle database. This dll is also part of the Oracle administrative client and should already be installed -unless you customized the Oracle client installation and choose not to install the ODP.net component.

1. To create a new package, click on the packages folder. The Packages folder is a new folder that has been created for Infor Campaign Management and is located under the presentation node in the tree structure of Admin Manager .
2. The package view in the right panel opens, click on **New**, found on the right toolbar menu.
3. You need to enter a Name, Developer label, Label, IA Server, IA Password and the Admin HTTP port on which IA server is running. Click on **Get Templates**.
4. Clicking on **Get Templates** returns a list of templates to the template drop down menu. You need to choose the proper template to use from this drop down menu.

5 When choosing a template, please keep in mind that the Basic Template is the only Infor Interaction Advisor template that does not utilize the Application Library. You need to choose a template that utilizes the Application Library in order for the integration to perform properly.

6 Once you have selected your template, click on Create Package in the Package Dialog box then click on OK. This will save your Package. Once a package has been created, the Admin Manager does not allow the creation of a second package.

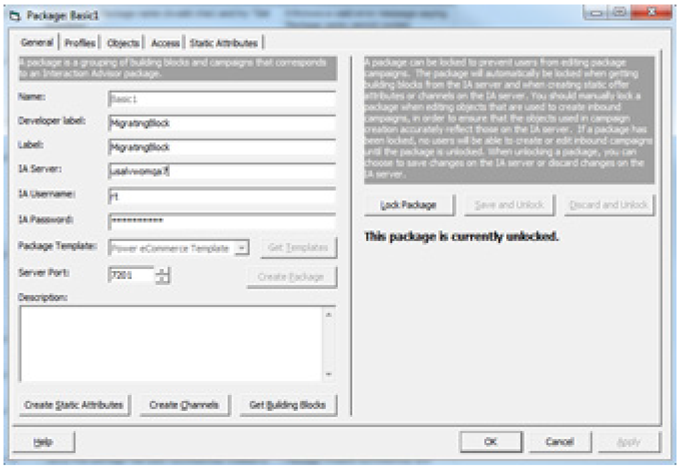


Figure 7: Package Dialog Box

Creating Channels in Admin Manager

After you have successfully set up the Package in Admin Manager, you need to define the Channel Types you would like to use in Infor Campaign Management.

The Channel Types folder is a new folder that has been created for Infor Campaign Management, and is located within the Security/Storage folder of the tree structure of Admin Manager. Selecting the Channel Types folder displays the contents of the folder in the right pane of the manager.

1 To create a new channel type, right click on the channel type icon and select 'New Channel Type'. A Channel Type window appears, and you need to enter the required information, Channel Type Name, Label, and Developer Label.

2 Select the appropriate Channel direction.

3 Add channels to the channel type by entering the appropriate information in the Channels grid.

4 Once you have completed all of the required information choose **OK** to close the window and save the information:

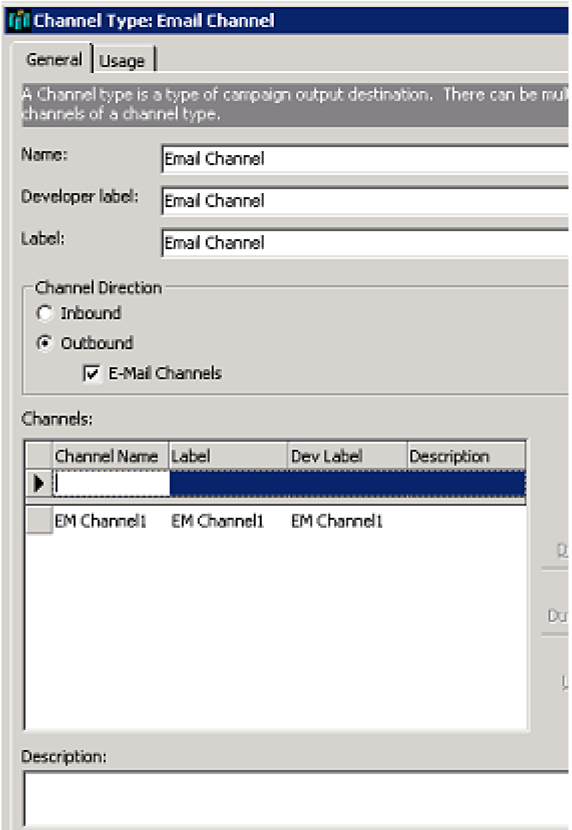


Figure 8: Channel Type Window

Importing Building Blocks from Infor Interaction Advisor

After the package has been created and the channels are defined, Infor Campaign Management is now ready to receive the Building Blocks from Infor Interaction Advisor. The Building Blocks are the basic units of information that define a campaign in Infor Interaction Advisor that includes Profiles, Acceptance Levels, Analytic Groups, Arbitration Functions, and Operators. Consult your Infor Interaction Advisor documentation for more information. You need to create these building blocks in Infor Interaction Advisor before importing them in Admin Manager.

To get the building blocks re-enter the Packages folder, and click on Edit located on the right toolbar menu to open the Package window. The Get Building Blocks button is located on the **General** tab within the Package window.

1 Click on **Get Building Blocks**. Clicking this button imports the building blocks from the Infor Interaction Advisor noted in the previous step.
2 Once the building blocks are imported, you can view them on the other tabs of the Package window.
3 The **Profiles** tab contains the data groupings used for inbound campaigns. If you select a profile in the left column, the attributes for that profile will be displayed in the right column.

4 The **Objects** tab contains Infor Interaction Advisor specific items used for inbound campaigns.

- Ensure that the following objects have content listed within each area: **Acceptance Levels, Arbitration Function Name, Analytic Groups, Operators:**

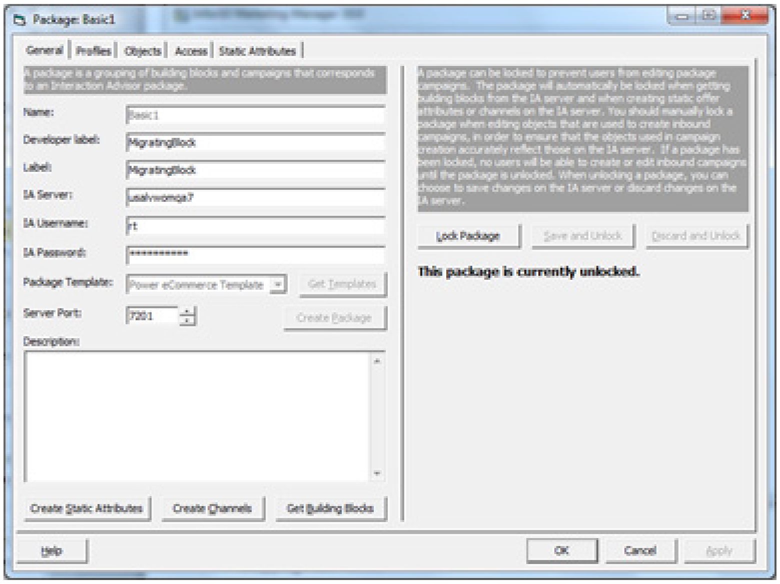


Figure 9: Get Building Blocks

Mapping Attributes

For any attributes that you wish to make available for inbound campaigns, map the attributes to imported Profile Attributes. Attributes can only be mapped to non-composite profile attributes. To map an Attribute to an imported Profile Attribute, do the following:

1 Open the Attribute dialog box for the attribute that you wish to map to a Profile Attribute.

2 In the **General** tab of the Attribute dialog box, choose the desired Profile Attribute from the Inbound Profile Attribute drop-down list box. This drop-down includes all non-composite attributes in profiles that are imported from the Infor Interaction Advisor Server.

3 Click **OK** to close the Attribute dialog box.

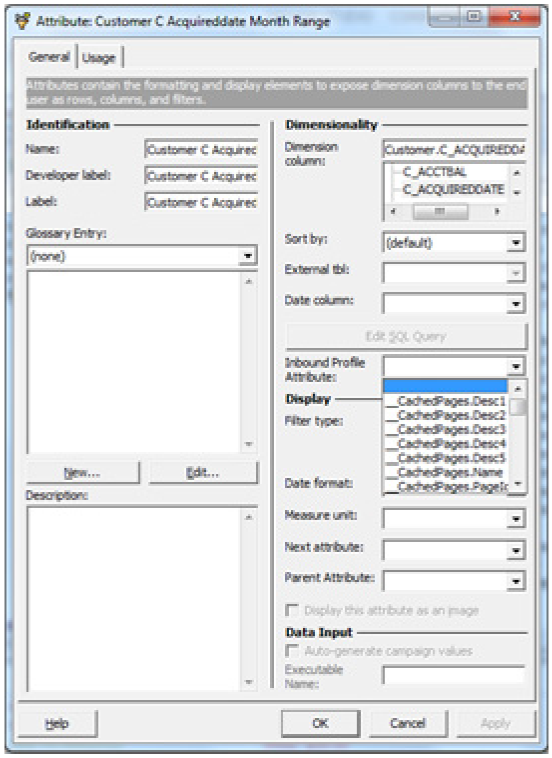


Figure 10: Attribute Dialog Box

Mapping Transaction Filters

For any transaction filters that you wish to make available for inbound campaigns, map the attributes to imported Profiles. Transaction filters can only be mapped to multi-row profiles. In order for a transaction filter to execute correctly for inbound channels, all attributes available as transaction filter filters for that attribute must be mapped to multi-row profiles. To map a transaction filter to an imported Profile, do the following:

1. Open the Transaction Filter dialog box for the transaction filter that you wish to map to a Profile.
2. In the **General** tab of the Transaction Filter dialog box, choose the desired Profile from the **Profile** drop-down list box. This drop-down includes all multi-row profiles that are imported from the Infor Interaction Advisor Server.
3. Click **OK** to close the Transaction Filter dialog box.

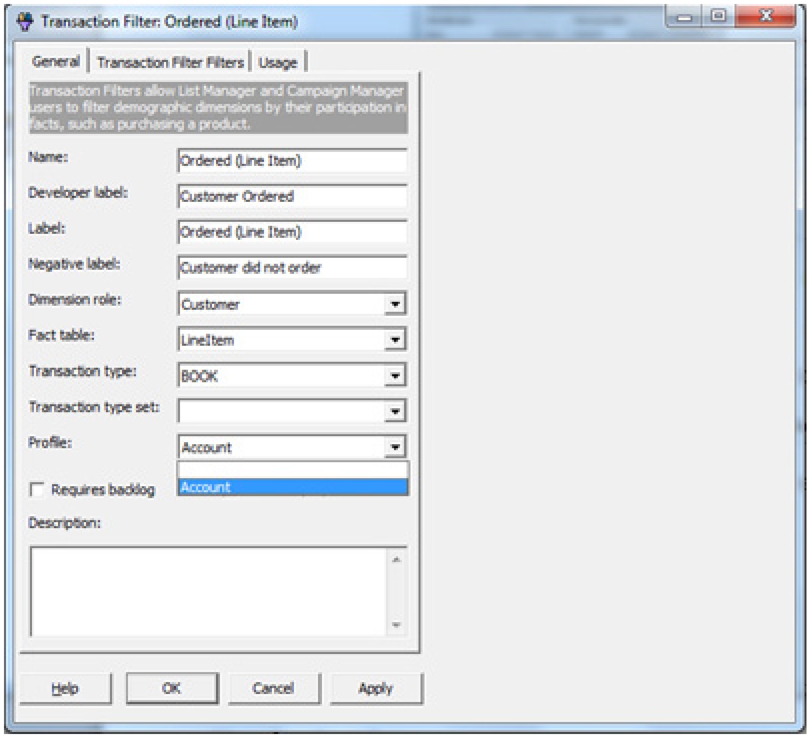


Figure 11: Transaction Filter Dialog Box

Mapping Fact Terms

For any measures that you wish to make available for inbound campaigns, you must map the fact terms used by those measures to imported Profile Attributes. Note that fact terms can only be mapped to non-composite profile attributes from multi-row profiles. Any attribute used for filtering in a measure must be mapped to a multi-row profile in order for the measure to execute properly with inbound channels. To map a fact term to a profile attribute, do the following:

1. Open the Fact Term dialog box for the fact term that you wish to map to a Profile attribute.
2. In the **General** tab of the Fact Term dialog box, choose the desired Profile Attribute from the **Profile Attribute** drop-down list box. This drop-down includes all non-composite multi-row profiles that are imported from the Infor Interaction Advisor Server. The profile attribute selected here is used whenever the fact term is used without backlog in a measure.
3. Choose the desired Profile Attribute from the **Backlog Profile Attribute** drop-down list box. This drop-down includes all non-composite multi-row profiles that are imported from the Infor Interaction Advisor Server. The profile attribute selected here is used whenever the fact term is used with backlog in a measure.
4. Click **OK** to close the Transaction Filter dialog box.

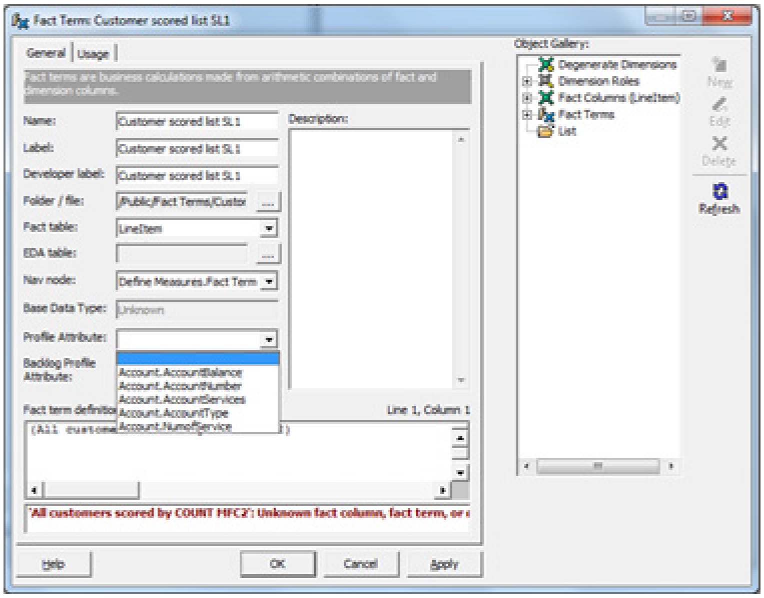


Figure 12: Transaction Filter Dialog Box

For every measure that you wish to make available for inbound use, after you have mapped fact terms used by the measure to profile attributes, open the Measure dialog box for that measure and verify that the measure is valid for Inbound campaigns. To verify that the measure is valid for inbound campaigns, verify that the status field at the bottom of the **General** tab of the Measure dialog box has the message "This measure is valid" and does not have the message "This measure is only valid for outbound use".

Configuring the RTDB Data Store

1. In your EpiCenter, select **Extraction/Data Stores > EIIA**.
2. Open the **EIIA_RTDB** data store
3. On the **General** tab, ensure that "**Real-time data store**", "**Input data store**", and "**Output data store**" are selected.
4. On the **General** tab, select the store type for the RTDB database used by your Infor Interaction Advisor Server.
5. On the **Properties** tab, configure the connection information for the RTDB database used by your Infor Interaction Advisor Server.
6. Click **OK**.

   Note: Please refer to Infor Interaction advisor install guide to create a RTDB.

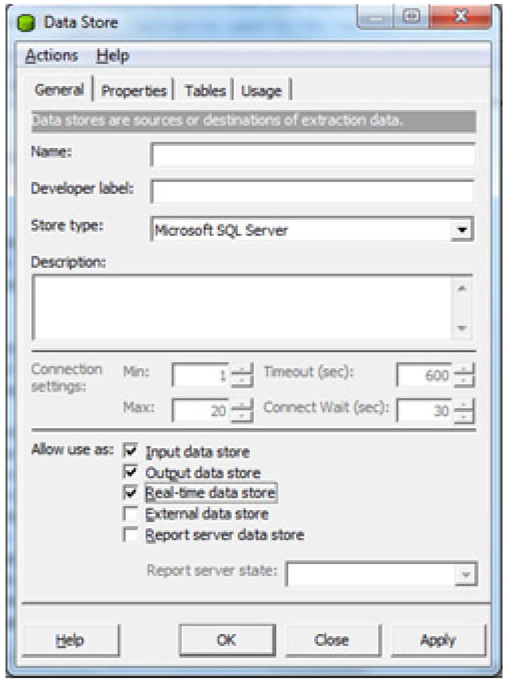


Figure 13: Configuring the RTDB Data Store

Configuring Extraction Related Macros

1 In your EpiCenter, select **Extraction/Macros > EIIA**.

2 If necessary, edit the macros in this folder in accordance with the instructions in the macro description. In particular, the EIIA_PACKAGE_NAME_TO_EXTRACT macro needs to be edited (see steps below), and the EIIA_RTDB_LOCALE_NAME macro needs to be edited if you are using a locale other than 'en' for the RTDB.

3 To edit the EIIA_PACKAGE_NAME_TO_EXTRACT macro:

a Open the EIIA_PACKAGE_NAME_TO_EXTRACT macro.

b Choose the database platform for your RTDB database from the DB Type drop-down.

c Change the translation to the name of the Package that you are creating for Inbound campaigns. This name must be enclosed in single quotes.

d If your EpiMart database is on a different database platform from your RTDB database, select the database platform for your EpiMart database from the DB Type drop-down and make the same change to the translation.

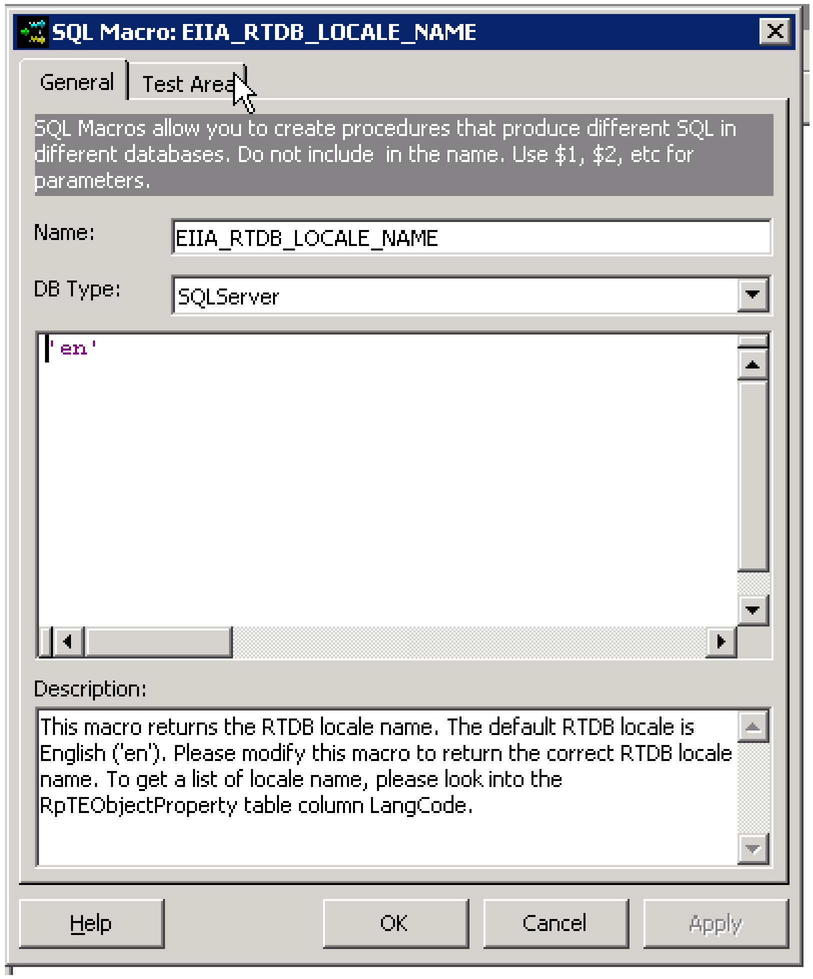
e Click **OK**.

4 To edit the EIIA_RTDB_LOCALE_NAME macro:

a Open the EIIA_RTDB_LOCALE_NAME macro.

b Choose the database platform for your RTDB database from the DB Type drop-down.

c Change the translation to the name of the locale that you are going to use for inbound campaigns. This name must be enclosed in single quotes:



d Click **OK**.

Editing Extraction Steps

For joint history fact extraction, the inferrered response fact for the dimension used for Inbound campaigns must include the EIIA_ACCEPT_LEVELS dimension role in its dimensionality. In most cases, this dimension role is added automatically. However, in some cases, such as import of a pre-existing inferred response fact, this dimension role may be missing. The relevant inferred response fact is the generated fact table whose name begins with the name of the demographic dimension used for inbound campaigns and ends with the suffix "_ifr". Open this fact in Admin Manager and verify that the EIIA_ACCEPT_LEVELS dimension role has been added on the Dimensionality tab. If the dimension role is missing, add it manually by clicking on "Add" and selecting the EIIA_ACCEPT_LEVELS dimension role from the pop-up dialog box. You need to generate schema after adding this dimension role.

If you are extracting inferred response data for outbound campaigns to the inferrered response fact for the dimension used for Inbound campaigns, you need to modify your inferred response extraction to add a value for the EIIA_ACCEPT_LEVELS dimension role. To do this, add the following line immediately before the line "1 Occur" in the inferred response extraction SQL:

```
0 eiia_accept_levels_sskey,
```

1 Choose **Extraction- > Edit Extraction Steps** from the Objects menu for your EpiCenter.
2 Expand the **EIIA Combined History Extraction** group under **All Extraction Steps**.
3 Expand the **Sample Joint History Fact Extraction** subgroup.
4 Expand the **Communication** subgroup.
5 Open the **Truncation** step in the **Communication** subgroup.
6 In the Truncation Step dialog box, check the **Valid** (can be included in a job) option.

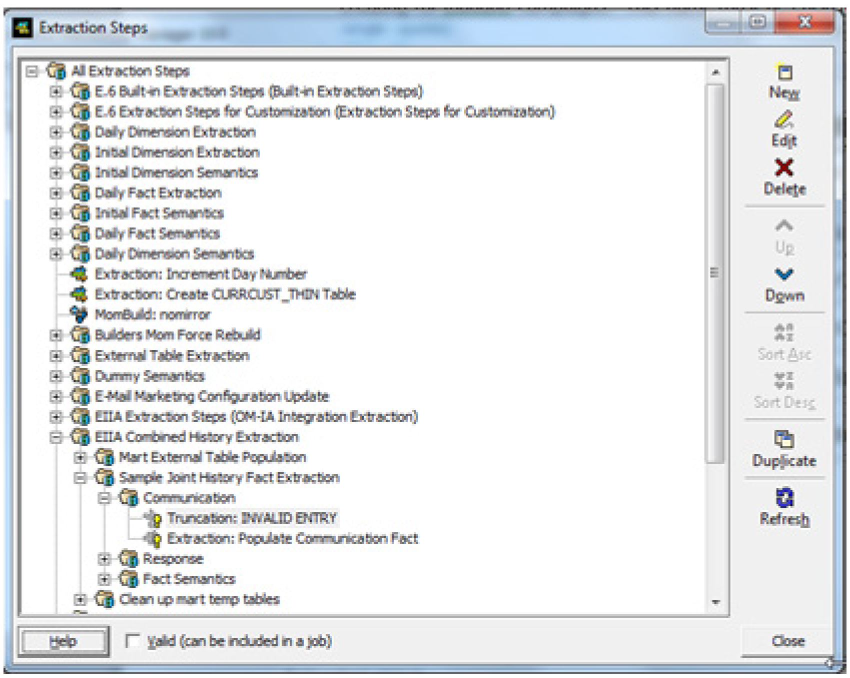


Figure 14: Editing Extraction Steps

7 Under **Fact Table**, select the communication fact for the dimension that is used for Inbound campaigns. This will have a name that starts with the dimension name and ends with "_com". For example, if the dimension used for Inbound campaigns is called Customer, the communication fact table will have a name like ‘Customer_CU_com’.

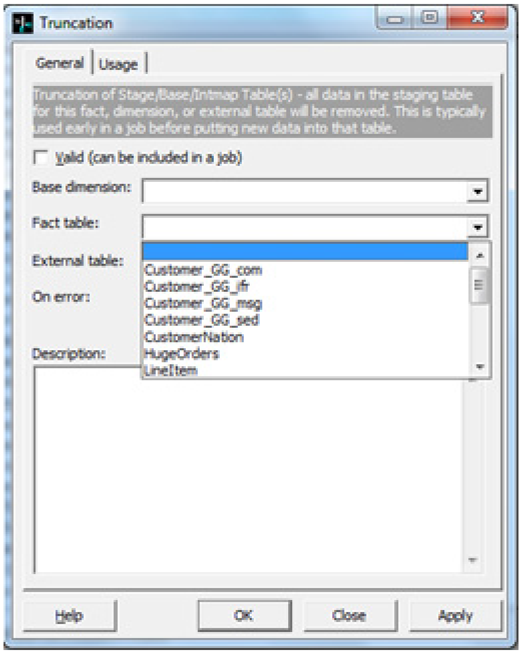


Figure 15: Truncation Step Dialog Box

8 Click **OK** to close the Truncation Step dialog box.

9 Open the Populate Communication Fact extraction command in the Communication subgroup.

10 In the Extraction Command dialog box, check the **Valid** (can be included in a job) option.

11 Under **Output Table**, select the **Fact Table** option.

12 In the table name drop-down list box, select the communication fact for the dimension that is used for Inbound campaigns.

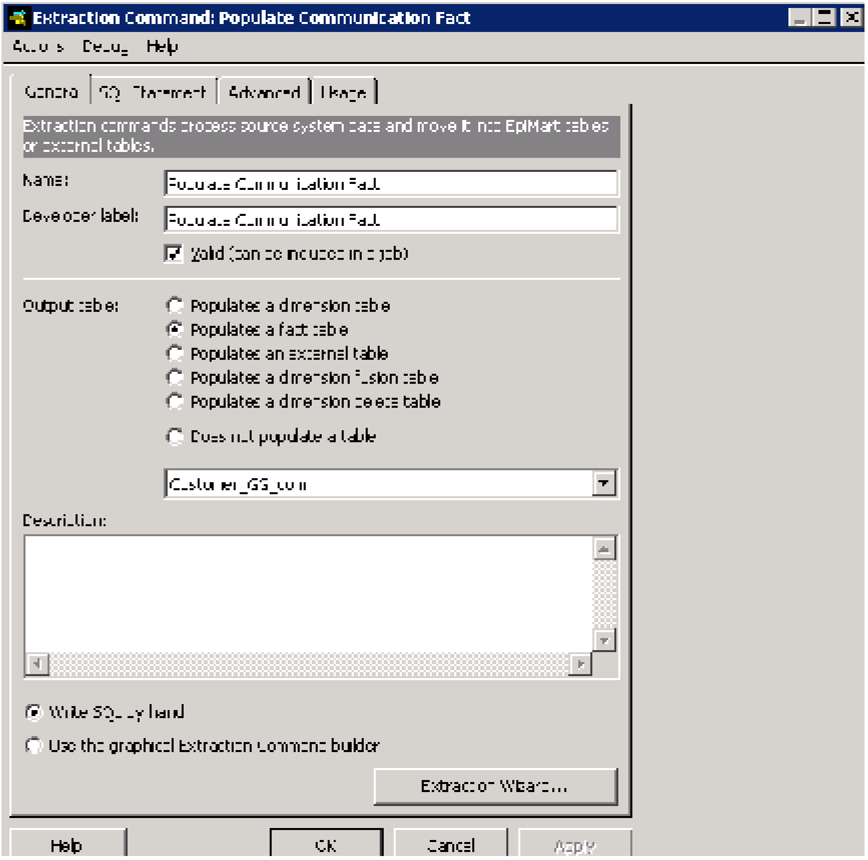


Figure 16: Extraction Command Dialog Box

13 Click **OK** to close the Extraction Command dialog box.

14 Expand the Response subgroup under the Sample Joint History Fact Extraction group.

15 Open the Truncation step in the Response subgroup.

16 In the Truncation Step dialog box, check the **Valid** (can be included in a job) option.

17 Under **Fact Table**, select the inferred response fact for the dimension that is used for Inbound campaigns. This will have a name that starts with the dimension name and ends with "_ifr". For example, if the dimension used for Inbound campaigns is called ‘Customer’, the communication fact table will have a name like ‘Customer_CU_ifr’.

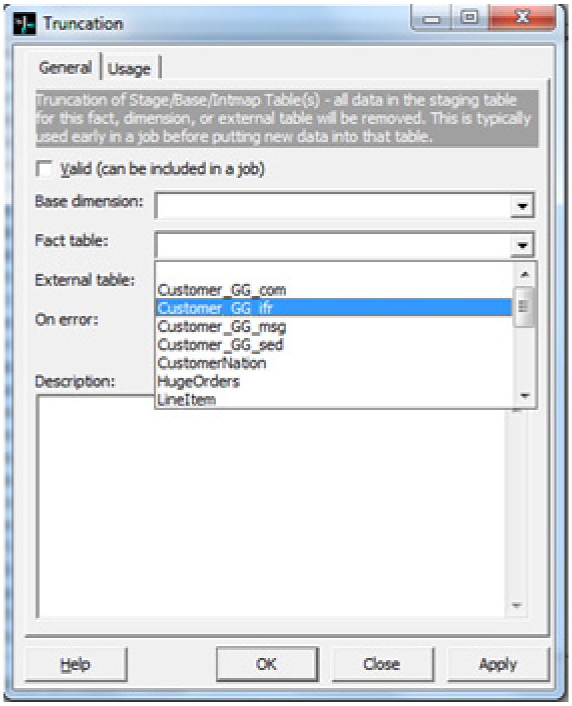


Figure 17: Truncation Step Dialog Box

18 Click **OK** to close the Truncation Step dialog box.

19 Open the Populate Inferred Response Fact extraction command in the Response subgroup.

20 In the Extraction Command dialog box, check the Valid (can be included in a job) option.

21 Under **Output Table**, select the **Fact Table** option.

22 In the table name drop-down list box, select the inferred response fact for the dimension that is used for Inbound campaigns.

23 Click **OK** to close the Extraction Command dialog box.

24 Under the **Fact Semantics** folder, open the first semantic and select the '**Valid**' checkbox. Select the **Fact Table** radio button from the **Fact** drop down, and select the communication fact for the dimension that is used for Inbound campaigns. This will have a name that starts with the dimension name and ends with "_com". For example, if the dimension used for Inbound campaigns is called "Customer", the communication fact table will have a name like 'Customer_CU_com'. Choose the appropriate semantic type and click on **OK** to close the semantic window.

25 Under the **Fact Semantics** folder, open a second semantic and select the '**Valid**' checkbox. Select the **Fact Table** radio button from **Fact** drop down, and select the inferred response fact for the dimension that is used for Inbound campaigns. This will have a name that starts with the dimension name and ends with "_ifr". For example, if the dimension used for Inbound campaigns is called "Customer", the communication fact table will have a name like 'Customer_CU_ifr'. Choose the appropriate semantic type and click on **OK** to close the semantic window.

Note: Run a job that includes Mombuilder in 'no mirror mode', after the Inbound extraction job has been run.

Configuring Inbound Extraction Job

1 Ensure that you have edited extraction steps as described above.
2 In your EpiCenter, select **Extraction/Jobs > Templates**.
3 Duplicate the Inbound job template.
4 Open your copy of the Inbound job template for editing.
5 Go to the **Extraction Steps** tab.
6 In the left pane of the **Extraction Steps** tab, expand the Inbound Extraction Steps group.
7 Expand the Dimension group under the Inbound Extraction Steps group.
8 If this job is used to perform an incremental load of the EIIA_ACCEPT_LEVELS dimension, select the Initial Dimension Semantics subgroup of the Dimension group and uncheck the Enabled (will be included in the job) option under Step Properties in the lower left region of the window.

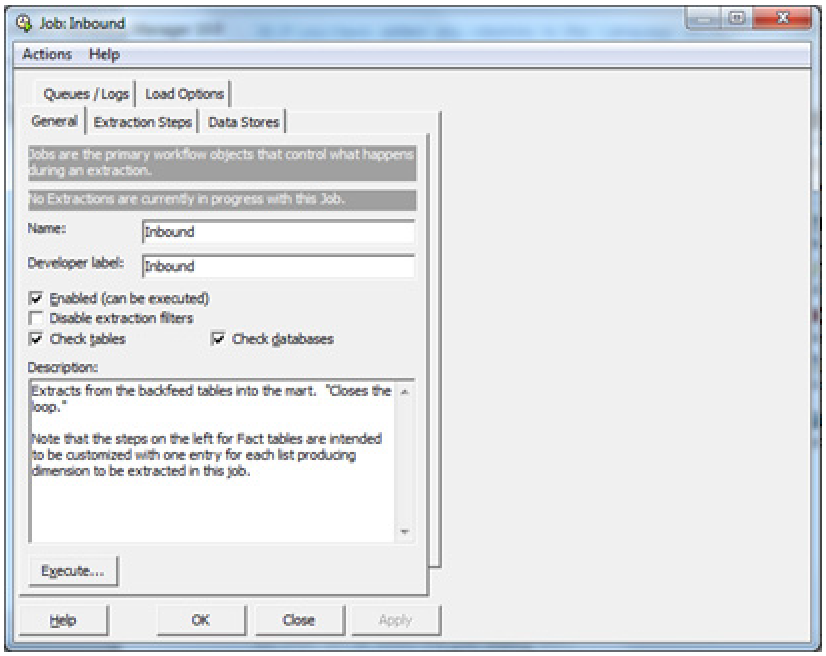


Figure 18: Job: Inbound

9 If this job is used to perform an initial load of the EIIA_ACCEPT_LEVELS dimension, select the **Daily Dimension Semantics** subgroup of the **Dimension** group and uncheck the **Enabled** (will be included in the job) option under **Step Properties** in the lower left region of the window.
10 If this job is used to perform an initial load of the EIIA_ACCEPT_LEVELS dimension, go to the **Load Options** tab and check the **Initial Load** option for the EIIA_ACCEPT_LEVELS base dimension.
11 Click **OK** to close the job dialog box.

Note: After the specified changes are implemented, you must run the Generate Schema (in adapt mode) followed by Scrutiny to check for any issues.

Infor Interaction Advisor

3

In order to ensure that Infor Campaign Management and Infor Interaction Advisor integrate correctly, there are several steps that the Infor Interaction Advisor administrator will have to perform.

Templates

Ensure that the Templates in Infor Interaction Advisor (which will be available for selection in Admin Manager to integrate with) utilize the Application Library. (Note that the Basic Template does not utilize Application Library, and it should therefore not be chosen for integration). If the integration needs to be with a package which is not a template, then you will need to ensure that it utilizes the Application Library, and then deploy that package as a template so that it will be available in Admin Manager for integration.

Enabling the Consolidation of History

In order to consolidate the contact history which occurs via inbound channels and outbound channels, the following steps need to be completed.

1. Update IA's RTDB using the `MakeCampaignHierarchy_<db type>` script, located in the Marketing Server's installation files sub-directory: .

   `<Infor Campaign Management install dir>\ConfigFiles\Resources\<db type>\MakeCampaignHierarchy_<db type>.sql`

   Note: 'db type' refers to an IA RTDB type, which can be either SQL Server, Oracle, or DB2.

2. Update IA's RTDB using `OM_Integration.sql` script located in the RT Server's installation files:

   `<IA RT Server install dir>\RT\SQL\SQLServer\ OM_Integration.sql`

   You may modify the script if you have additional custom fields in your RpOfferTracker view. The script does the following:

   a. Update the RpOffers Table to add 3 new required string fields (254 chars). A default value of '-1' is given to existing rows. Field names are (and must not be changed):

- CampaignExternalId
- OfferExternalId
- ChannelExternalId

For example (SQL Server):

```
ALTER TABLE RpOffers
         ADD CampaignExternalId VARCHAR(254) DEFAULT '-1' NOT NULL

           , OfferExternalId    VARCHAR(254) DEFAULT '-1' NOT NULL

           , ChannelExternalId  VARCHAR(254) DEFAULT '-1' NOT NULL
```

b Modify RpOfferTracker View to add the 3 new fields.

For example (SQL Server):

```
EXEC RpDropIfExists N'RpOfferTracker', 'VIEW';
         CREATE VIEW RpOfferTracker AS
           SELECT
             CASE
               WHEN RpOffers.SessionId IS NOT NULL THEN RpOffers.
SessionId
               ELSE RpVisitors.VisitorId
             END AS SessionId,
             RpOffers.RP_AgentName,
             RpOffers.CampaignExternalId,
             RpOffers.OfferExternalId,
             RpOffers.ChannelExternalId
           FROM RpVisitors, RpOffers
           WHERE RpOffers.Vid = RpVisitors.Vid;
```

3 Open the package/template in RT Studio application. Specify the information:

a Create new **Profile Function (Standard)**.

- **Name**: RpOffersOMFields
- **parameter field**: fieldname
- **JS Content**:

```
return RetrieveRpOffersOMFields(fieldname);
```

b Now refresh the **OfferTracker Table** object in the package, by reselecting the **RpOfferTracker** view in the **Selected Table** field. The three new table columns must appear.

c For each of these 3 new externalId columns, update the mapped fields to the new function just created.

- **Mapped Object**: Function
- **Mapped Field**: RpOffersOMFields

d Create a new Profile as follows:

- **Profile Name**: OMSessionProfile
- **Profile Type**: Session
- **Profile Field**: singleCampaignNames
- **Composite**: (no)
- **Default Values**: “” (2 double quotes)

e Create or add to function used for the Package object’s ‘**Execute on Load**’ function. For example:

- **Name**: Package_Load
- **JS Content**:

```
OMIntegrationInit();
```

f Now switch to the **Offer Acceptance Levels** tab to see if the '**Implicit Offer Extension**' setting is off(unchecked). You must also search the package for code that sets the ‘**ImplicitOfferExtension**’ property to false during runtime depending on the event or channel. If ever set to false (off), AND your package does not have code which calls the '**ProcessOffersExtended**' function when the campaign triggering event occurs, then add a new function call in the package's Final Arbitration function. The system is now able to generate and set the Campaign Name value which is activated, and resulted in IA presenting offer(s) for extension consideration. For example:

- Name: **Final Arbitration**
- parameter field: **topCampaigns**
- JS Content:

```
if(Package.ImplicitOfferExtension == false)
        {
             OMFinalArbitration(topCampaigns);
        }
```

g If you have **Acceptance** events or **Delayed Extension** events that occur in a LATER session from the original session where the Campaign Triggering Event occurs, then do the following:

- Create new **Dynamic Offer Attribute** (on Package object) named: '**singleCampaignName**'
- Ensure you handle/store this value during campaign triggering events, so it can be sent back later.
- Ensure that the **Acceptance** events which occur in later sessions include an event field named: '**SingleCampaignName**' and that the value stored earlier is sent.
- Ensure that the **Delayed Extension** events which occur in later sessions include an event field named: '**SingleCampaignName**' and that the value stored earlier is sent. (

  Note: 'Delayed' Extension event refers to events that occur after the original campaign triggering event, in order to record which of the 'presented' offers actually got extended to customer. This is a typical Call Center scenario. 3 offers are triggered/presented to agent, but only 1 gets extended to customer. These events DON'T need to have this extra field added if these events occur in the same session as the earlier campaign triggering event (the one that presented 3 offers to the agent.

)

4 The Real-Time Server must be configured to store campaign packages in an RTDB. See Chapter 4 in the Infor Real-Time Administration Guide, for detailed instructions.

Enabling the 'Like' and 'Not Like' Operators

In order to use 'Like' or 'Not Like' operators in Mixed or Inbound Campaigns, the following steps need to be completed in the IA package in RT Studio.

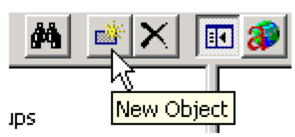
1 Edit the Package_Load() utility function. At the bottom of it, copy and then paste this text:

```
RegExp.escape = function(str) {
           return str.replace(/([.*+?^=!:${}()|[\]\/\\])/g, '\\$1');

        }
        RegExp.escapeLikeChars = function(text) {
          // FYI: OM uses "|" to escape the SQL Like "%" and "_"
characters.
          // Steps:
          // 1. convert all "%" & "_" that are not escaped to "%%" &
 "__"
          // 2. convert all "|%" & "|_" to "%" & "_"
          // Later we'll replace "%%" and "__" with the regExp
counterpart.

          // Step 1.
          // find any "%" at start of string via: (^%)
          //      or are not preceeded with a "|" via: ("|[^|]%")
          // When found at start, replace with "%%".
          // When found after a non-escape char, add an additional
"%" symbol.
         // For example, if pattern="%Bob%", pattern becomes "%%Bob%%
".
          text = text.replace(/^%|[^|]%/g, function(match){
             var theChar = '%';
                         if (match.substring(0,1) != theChar)
                           return match.substring(0,1) + theChar +
theChar;
                         else //text starts with "%"
                           return theChar + theChar ;
            });
          // repeat for "_"
          text = text.replace(/^_|[^|]_/g, function(match){
```

```
              var theChar = '_';
                          if (match.substring(0,1) != theChar)
                            return match.substring(0,1) + theChar +
theChar;
                          else //text starts with "_"
                            return theChar + theChar ;
              });
            // Step 2.
            text = text.replace(/\|%/g, "%"); //find any "|%" strings
and replace
          with "%"
            text = text.replace(/\|_/g, "_");
            return text;
          }

          RegExp.like = function (text) {
            text = RegExp.escapeLikeChars(text);
            // Next we can
            // a. escape the standard regular expression characters
            // b. convert "%%" and "__" to their regular expression
counterparts.
            return new RegExp("^"+(RegExp.escape(text).replace(/%%/g,
            ".*").replace(/__/g, "."))+"$");
          }
```

2 Select the **Operator** tree element.

a Then press the **Add New Object**button:



b Name it "Like" (function field - this will default to the something such as: "Function01", "Function02" etc.).

c At bottom of screen:

1 For the Left Operand select the "**Profile.normal**" check box.

2 For Right Operand select "**Value" & "Profile.normal**" check box.

d In the large white box (code area) copy and then paste this text:

```
var regEx = RegExp.like(right);
          return regEx.exec(left) != null;
```

3 Press the **Add New Object** button again.

a Name it "NotLike" (function field).

b At the bottom of the screen:

1 For the Left Operand select the "**Profile.normal**" check box.

2 For the Right Operand select "**Value" & "Profile.normal**" check box.

c In the large white box (code area) copy and then paste this text:

```
var regEx = RegExp.like(right);
         return regEx.exec(left) == null;
```

4 After creating these operators in Infor Interaction Advisor, please get the building blocks from Admin Manager to make sure the operators are available on the Infor Enterprise Marketing Suite Marketing product.

Configuring SSL in OCM-IA integration environment

4

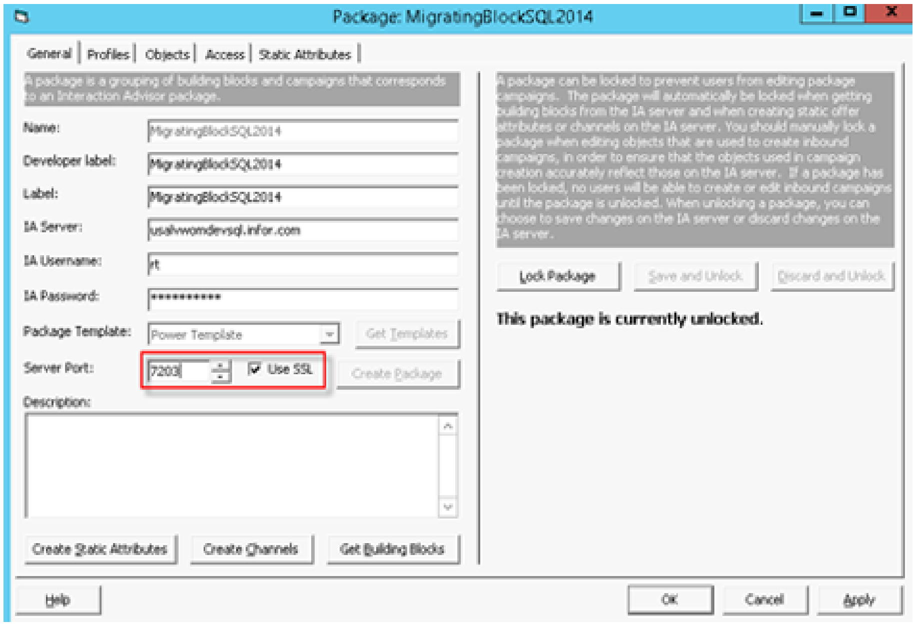
To ensure that Infor Campaign Management and Infor Interaction Advisor integrate with SSL correctly, these steps must be executed:

- Enable SSL in Admin Manager
- Enable SSL on OCM Admin Manager to communicate with IA
- Enable SSL on OCM UUI to communicate with IA

Enabling SSL in Admin Manager

To enable SSL in Admin Manager:

1. Update the REST client dll again after the updated version is installed. The command line to register is:
   `(run in <install_dir>\bin): regasm /tlb iaRestClientLib.dll`
2. To enable SSL on OM, go to the package and select the **Use SSL** check box.
3. Specify the fully qualified name in the **IA Server** field. For example, `usalvwomdevsql.infor.com`.
4. Specify the default IA SSL (https) port number, **7203** in the **Server port** field.



Enabling SSL on OCM Admin Manager to communicate with IA

You can enable SSL on OCM Admin Manager to communicate with Infor Interaction Advisor.

If the IA Server is using an untrusted certificate (for example, a self-signed certificate), you must obtain the root certificate (`.cer`) from IA and add the certificate to the Windows Trusted Root Certificate Store for the OCM server.

Note: To complete this procedure, the user must at least have the Administrator permissions to the group.

To add the certificates to the Trusted Root Certification Authorities store for a local computer:

1 Click **Start** and in the **Start Search** field, specify **mmc**.

2 Press Enter.

3 On the **File** menu, click **Add/Remove Snap-in**.

4 Select **Available snap-ins > Certificates > Add**.

5 Select **This snap-in will always manage certificates for > Computer account > Next**.

6 Click **Local computer > Finish**.

7 Click **OK** if you do not have more snap-ins to add to the console.

8 On the console tree, double-click **Certificates**.

9 Right-click the **Trusted Root Certification Authorities Store**.

10 On the **Action** menu, select All Tasks and click **Import**, to import the certificates.

Execute the steps in the Certificate Import Wizard window.

11 Specify the file name that contains the certificate to be imported. (You can also click **Browse** and navigate to the file.)

If a PKCS #12 file is imported:

- Specify the password used to encrypt the private key.
- Select the **Enable strong private key protection** check box to use a strong private key protection. This is optional.
- Select the **Mark key as exportable** check box to back up or transport your keys at a later time. This is optional.

12 To import the certificate:

- Click **Automatically select the certificate store based on the type of certificate** to place the certificate automatically in a certificate store based on the type of certificate.
- Select **Place all certificates in the following store**, click **Browse** and select the certificate store to be used.

Enabling SSL on OCM UUI to communicate with IA

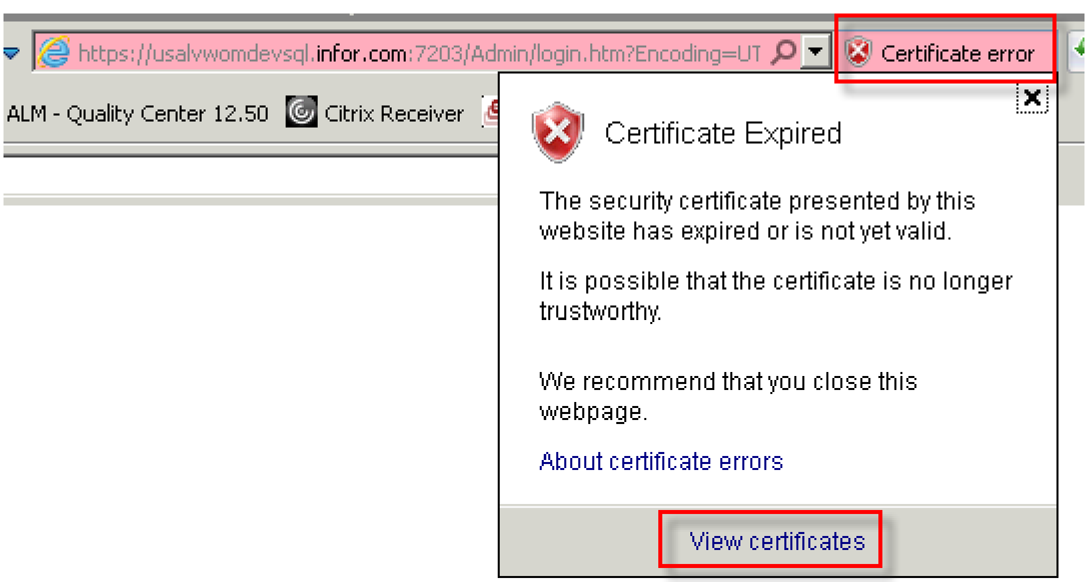
You can enable SSL on OCM UUI to communicate with Infor Interaction Advisor:

1 Open the `https` enabled Interaction Advisor Admin or Manager URL in a browser.

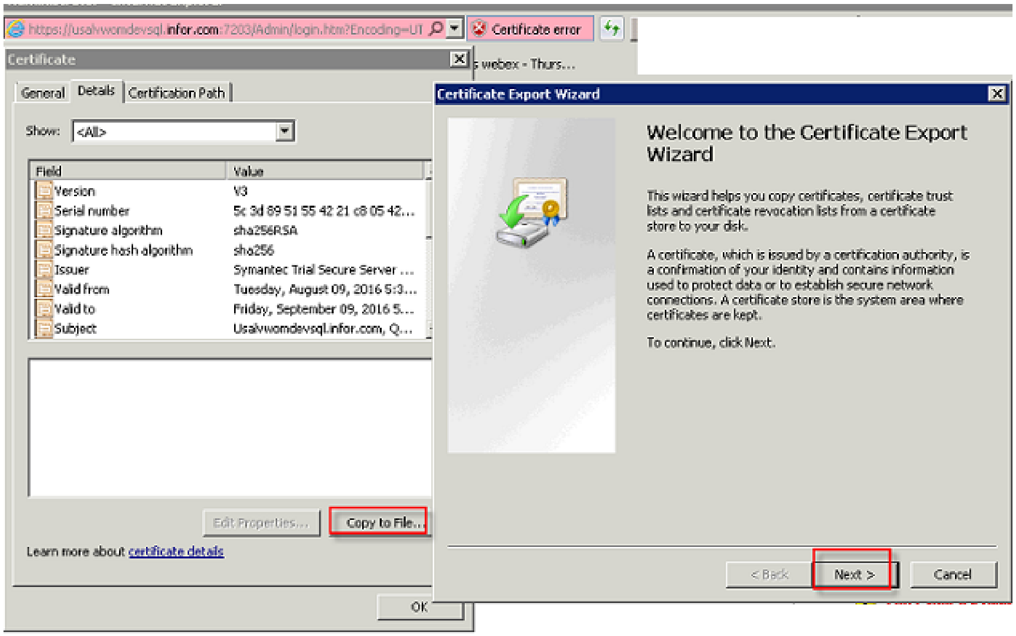
For example: `https://<IA machine name>.infor.com:7203/Admin/`

2

On the browser header, next to the URL link, click  .

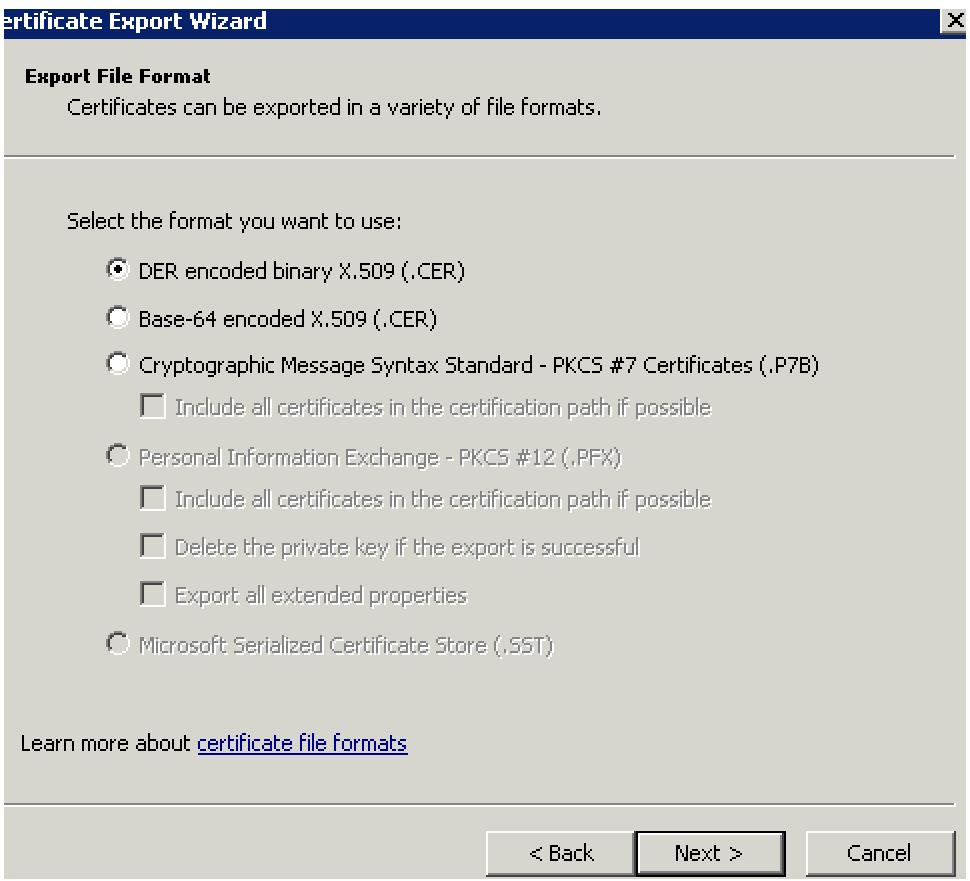


3 In the Certificate window, select the **Details** tab and click **Copy to file**.

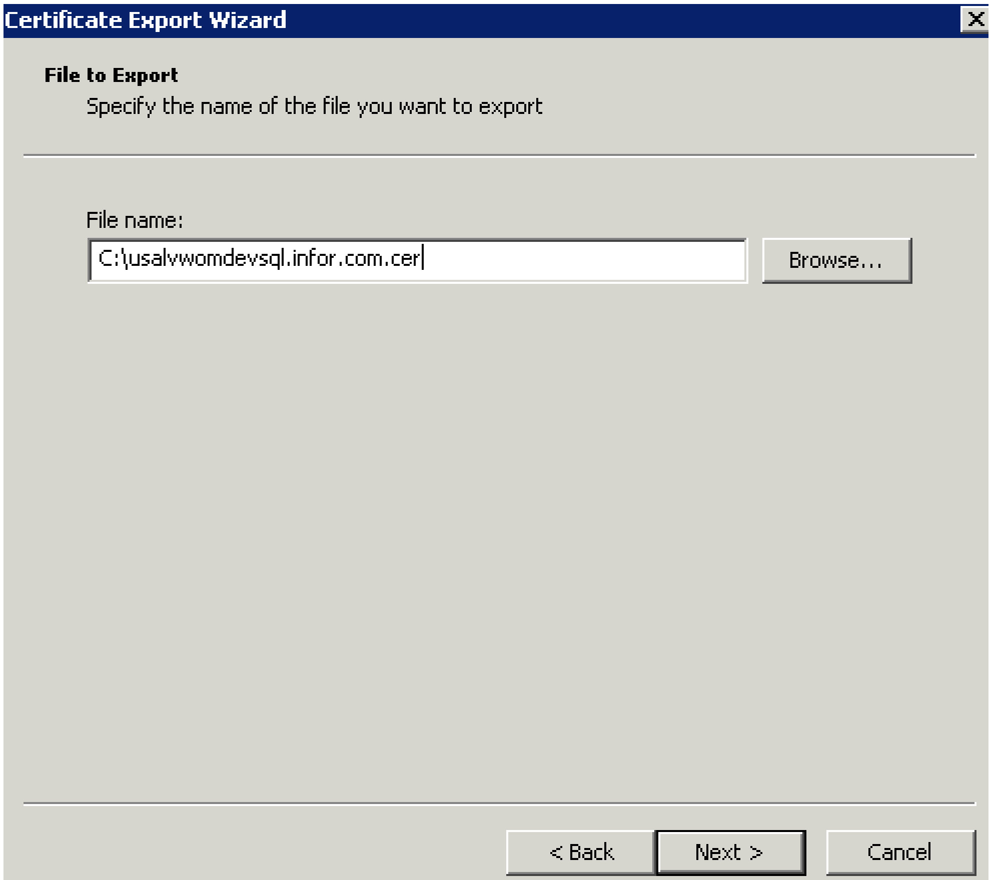


4 Click **Next**.

5 Select the file format to be used and click **Next**.

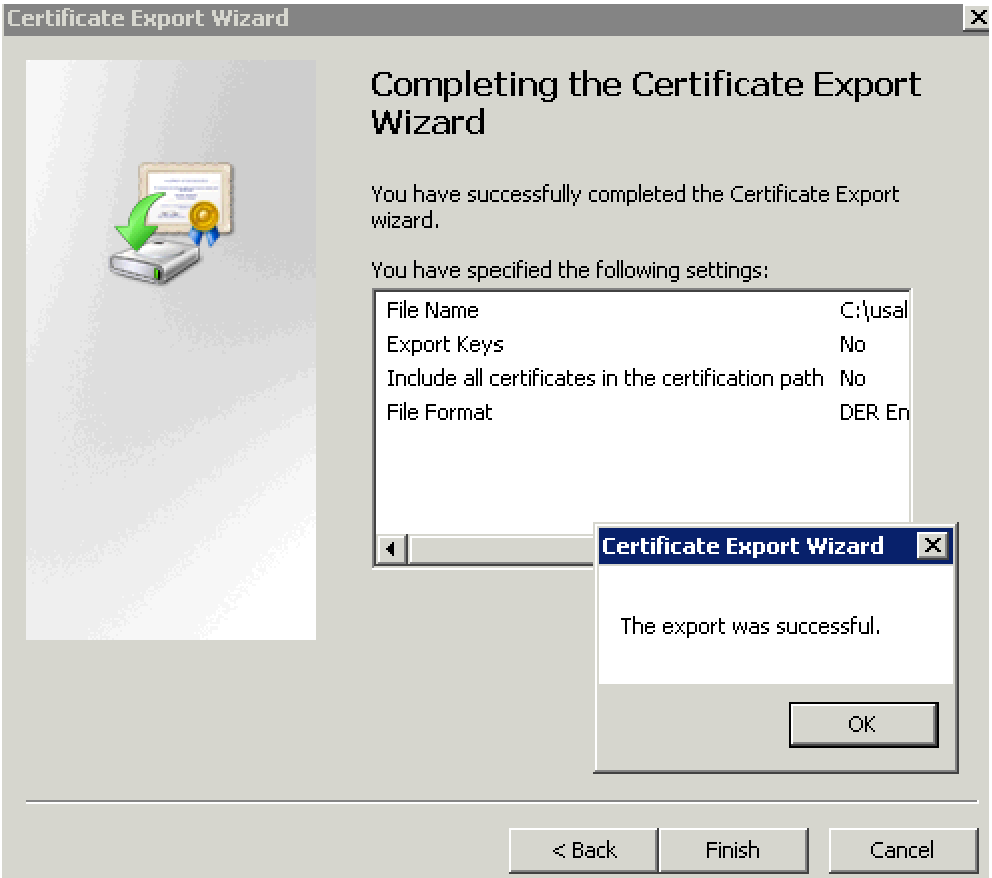


6 Specify the file name.



Note: The file name must be the fully qualified IA Server name. For example, `usalvwomdevsql.infor.com`. The `.cer` extension is added automatically.

7 Click **Finish** to complete the certificate export process.



8 Import the certificate created in step 5 to java JRE, CACERTS keystore file, to ensure that the Infor Marketing server UUI uses SSL connection to communicate with Infor Epiphany Interaction Advisor. The command to import the root authority certificate in the java CACERTS Keystore is:

```
C:\>keytool -keystore cacerts -import -file <usalvwomdevsql.infor.
com.cer>
Enter keystore password: <default password changeit>
Trust this certificate? [no]: yes
Certificate was added to keystore
```

Note: The CACERTS keystore file is a part of the java JRE and the path to the file is `<jre directory>\lib\security`. This varies for every customer.

Glossary