

Pega Marketing for Communications

INSTALLATION GUIDE

7.31



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Feedback

If you have suggestions or comments for how we can improve our materials, send an email to AppDocBug@pega.com.

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Prerequisites

Before you install the application, make sure that you complete all of the following tasks.

1. Review the database policies and application permissions that are used by your Pega Platform installation. Determine whether the application is permitted to update the database automatically or if you must generate the database scripts that your organization will use to manually make schema changes.
2. Install Pega 7.3.1 or later, and then verify your installation as described in the *Platform Installation Guide* for your environment, available on the [Deployment Guides page](#).

Update the Pega Platform online help to the latest version from the **Online Help Files** section on the [Pega Platform Update](#) page. After you download the latest **prhelp.war** file, deploy it in your Pega Platform installation before continuing. For deployment information, see the [Pega Platform Installation Guide for your application server](#).

3. Install and verify Pega Foundation for Communications 7.31 or later. For information, see the *Installation Guide* on the [Pega Foundation for Communications product page](#).

Apply any hotfixes for this application that are required to support the Pega Marketing for Communications application before continuing with the Pega Marketing for Communications installation. For the list of the required hotfixes, see the [Pega Foundation for Communications hotfixes page](#).

4. Install and verify Pega Marketing 7.31 or later. For information, see the *Installation Guide* on the [Pega Marketing product page](#).

Apply any hotfixes for this application that are required to support the Pega Marketing for Communications application before continuing with the Pega Marketing for Communications installation. For the list of the required hotfixes, see the [Pega Marketing hotfixes page](#).

5. Install and verify Pega Customer Relationship Management for Communications 7.31 or later. This application is required to use Next-Best-Action Advisor for Communications. For information, see [Pega Customer Relationship Management suite of applications](#).

6. Apply any required hotfixes for Pega Marketing for Communications. See the [Pega Marketing for Communications hotfixes page](#).

Backing up your system

Back up the existing database, your applications, and Pega Platform in the event that you need to restore your system.

1. Verify that all rules are checked in.
2. Shut down the Pega Platform application server.
3. Use your database utilities to back up the Pega Platform database.
4. If you edited any of the following Pega Platform configuration files in the APP-INF\classes directory of an EAR deployment or the WEB-INF\classes directory of a WAR deployment, include these files in the backup.
 - **prbootstrap.properties**
 - **prconfig.xml**
 - logging file: **prlogging.xml** or **prlog4j2.xml**
 - **web.xml**
 - **pegarules.keyring** or any other .keyring files
5. Back up any third-party or custom JAR files that you installed. Redeploying the Pega Platform applications might delete these from your application server.

Installing the application

To install Pega Marketing for Communications, complete the following steps:

- [Importing the application bundle](#)
- [Enabling operator accounts](#)
- [Optional: Creating operator accounts](#)
- [Verifying installed rulesets](#)
- [Verifying campaigns](#)
- [Optional: Extending application functionality](#)

Importing the application bundle

The system data and rulesets for Pega Marketing for Communications are loaded during this step.

1. Log in to the Pega Platform (<https://<hostname>:<port>/prweb>) by entering `administrator@pega.com` and the password that you specified when you installed this server.
2. To open the **Import wizard**, click **Designer Studio > Application > Distribution > Import**.
3. Browse for and select the **PegaMarketingForCommunications_731.jar** file from your distribution media, and follow the wizard instructions.

Caution: To ensure that you import all components, do not select the **Enable advanced mode to provide granular control over the import process** check box.

The wizard identifies differences between the database schema of your current system and the schema of Pega Marketing for Communications 7.31.

4. Based on the review of the database policies and application permissions that are used by your Pega Platform installation ([Prerequisites](#)), perform the step that is most appropriate for your installation:

- Select the **Automatic** check box and complete the wizard.
- Select **Manual** and complete the following steps:
 - a. Click **View/Download DDL SQL**, which produces a text file containing Data Definition Language (DDL) statements for the needed changes.
 - b. Save the DDL file and deliver it to a database administrator to make the required changes.

Depending on your organization's policies, database administrators might need to review these DDL files to determine what changes will occur prior to applying the DDL to your database.

After the database administrator has applied the DDL, repeat the Import wizard steps.

If there are errors that you cannot resolve, post your questions to the [Pega Product Support Community](#).

5. Optional: For best performance and initial user experience, run the Static Assembler utility to pre-assemble the rules in the application. For more information, see [Preassembling rules in an application by using the Static Assembler utility](#).
6. Apply any required Pega Marketing for Communications hotfixes. For the list of required hotfixes, see the [Pega Marketing for Communications Hotfixes page](#).

Enabling operator accounts

To configure certain Pega Marketing for Communications functionality, you must enable the Administrator@PMC operator account.

1. Log in as a Pega Platform administrator.
2. Click **Designer Studio > Org & Security > Organization > Operators**.
3. On the **Organization and Security: Organization** screen, search for and select the Administrator@PMC operator.
4. Click the **Security** tab, then clear the **Disable Operator** check box.
5. Click **Update password** and follow the prompts for creating a new password.
6. Save and close the operator screen.

7. Repeat Steps 3-6 and enable the following operators:
 - Microsite
 - CFFCaseManager
 - PCFDeveloper

Optional: Creating operator accounts

Pega Marketing for Communications has the following default access groups that are used to access the application:

- PegaMKTComms:Administrators – This is an access group for administrators. The default portal for operators in this access group is the developer portal. This group also grants access to the Pega Marketing portal.
- PegaMKTComms:MarketManagers – This is an access group for managers. The default portal for operators in this access group is the Case Manager portal. This group also grants access to the Pega Marketing portal.
- PegaMKTComms:MarketAnalysts – This is an access group for analysts and other marketing users. The default portal for operators in this access group is the Pega Marketing portal.

You can create operator accounts for the users of your application and assign them to the predefined access groups that are specified above.

Note: If you want to create operator accounts for users of your implementation application, see the *Pega Marketing for Communications Implementation Guide* on the [Pega Marketing for Communications product page](#).

1. Log in as a Pega Platform administrator.
2. Click **Designer Studio > Org & Security > Organization > Operators**.
3. Click **New**.
4. Enter the **Operator ID** and click **Create and open**.
5. In the **Contact Information** section on the **Profile** tab, fill out the required information.

6. In the **Access Group** section on the **Profile** tab, enter or select one of the predefined Pega Marketing for Communications access groups.
7. In the **Organizational unit** section on the **Work** tab, click **Update** and select the Organization, Division, and Unit for this operator.
8. Click **Save**.
9. In the **Access settings** section on the **Security** tab, select **Allow rule checkout**.
10. Click **Update password** and enter the password for this operator, then click **Submit**.
11. Click **Save**.
12. Log off and log in as the operator that you created.
13. In the operator preferences, disable the **Auto checkout on save as** setting. For more information, see [Updating Designer Studio preferences](#).

Tip: After creating the first operator record, open it in Designer Studio and click **Save > Save as**. This creates a new operator record with all the settings and preferences that you previously entered.

Verifying installed rulesets

To ensure that the installation finished properly and completely, complete the following procedure.

Note: If your system does not contain the latest rulesets, it indicates that the installation procedure was not completed successfully. If you are unable to resolve the situation, search on or post your question to the [Pega Product Support Community](#).

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Click **Designer Studio > Application > Structure > RuleSet Stack**.
3. Verify that the following ruleset versions are listed.
 - PegaMKTComms-Catalogue:07-31
 - PegaMKTComms-Appointment:07-31
 - PegaMKTComms-Artifacts:07-31

- PegaMKTComms-Rules:07-31
- PegaMKTComms-Int:07-31
- PegaMKTComms-UI:07-31
- PegaCRM-Rules:01-01

Verifying campaigns

You can verify that you have the latest Pega-provided Pega Marketing for Communications campaigns on your system.

1. Log in to your application by entering the `Analyst@PMCSample` operator ID and the password that you specified for this operator.

Note: This operator is disabled by default and must be enabled before you can use it. See [Enabling operator accounts](#).

2. Run all of the Pega-provided Pega Marketing for Communications campaigns.
Ensure that all campaigns are in the Running status.

For more information about the creation and submission of campaigns, refer to the *Pega Marketing Implementation Guide* on the [Pega Marketing product page](#).

Optional: Extending application functionality

To extend the functionality of Pega Marketing for Communications, you can optionally import and install various files that are included in the distribution media.

- You can optionally import the sample Pega Marketing for Communications application, which contains additional data that can be used for testing purposes and provides a view of some use cases that can be directly reused. Follow the process that is outlined in [Importing the application bundle](#). In Step 3, use the **PegaMarketingForCommunicationsSample_731** file.
- You can optionally import the sample customer Web Self-Service (WSS) application. Follow the process that is outlined in [Importing the application bundle](#). In Step 3, use the **PegaMarketingForCommunicationsWSS_731** file.

- To include images for email offers, you can optionally deploy the **uplus.war** file from the WebArchives folder in the distribution media.

Post-installation steps

The following list details required post-installation steps.

- [Connecting with other applications](#)
- [Verifying that required agents are running](#)
- [Enabling containers](#)
- [Configuring outbound email](#)
- [Configuring the Short Message Service Center \(SMSC\) channel](#)
- [Updating your application settings](#)

Connecting with other applications

To enable connectivity with the Product Catalog and the Customer Decision Hub application to allow for enhanced Pega Marketing for Communications application functionality, update the Pega Marketing for Communications Dynamic System Settings.

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Click **Records > SysAdmin > Dynamic System Settings**.
3. Update *ConnectProductCatalogURL* with the Product Catalog system URL:
`http://<hostname>:<port>`
 - hostname is the IP address where the application is installed
 - port is the configured port number
4. Update *ConnectMKTURL* with the Customer Decision Hub system URL: `http://<hostname>:<port>`
 - hostname is the IP address where the application is installed
 - port is the configured port number
5. Update *microsite/URL* with the microsite URL: `http://<hostname>:<port>/prweb/IAC`

- hostname is the IP address where the application is installed
- port is the configured port number

For more information, see [Dynamic System Settings data instances](#).

Verifying that required agents are running

To verify that all required agents are running, complete the following steps.

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Click **Designer Studio > System > Operations > Agent management**.
3. Review the **Ruleset** column to check that there are running agents (indicated in the **Status** column) in the following rulesets:
 - *PegaMKTComms-Artifacts*
 - *PegaMKT-Engine*
 - *PegaMKT-PushNotification*

If a required agent is indicated in the **Status** column to not be running, select that agent and then click **Start**.

4. Restart the application server.

Enabling containers

Containers are used to send offers from Pega Marketing for Communications to the Pega Customer Service for Communications and Pega Configure Price Quote applications. To enable containers, complete the following steps:

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Launch the **Pega Marketing** portal.
3. In the left column, click **Next-Best-Action > Designer**.
4. Click **Edit**, then click **Save**.

5. Repeat Step 4 for all configured Next-Best-Actions at both the Issue and Group level.
6. In the left column, click **Next-Best-Action > Supporting Decisions**.
7. Open a supporting decision, click **Edit**, then save the decision.
8. Repeat Step 7 as necessary for all supporting decisions.
9. Log off from the portal.

Configuring outbound email

To configure outbound email, complete the following steps.

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Click **Designer Studio > Integration > Email > Outbound Email**.
3. Update the configuration details for the Default email account in the **Account Name** column by using your User ID, Password, Connection Port, and Host (SMTP).
4. Save the rule.
5. To verify a successful connection to the email server, click **Test Connectivity**.

Configuring the Short Message Service Center (SMSC) channel

To configure the Short Message Service Center (SMSC) channel, complete the following steps.

1. Log in to your application by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Launch the **Pega Marketing** portal.
3. Click **Configuration > Settings > Channels > SMS**.
4. Click either the **Outbound** or **Inbound** tab and then click **Add new connection**.

Updating your application settings

To complete the configuration of Pega Marketing for Communications on this server, you must update the application settings.

1. Log in to Pega Marketing for Communications by entering the Administrator@PMC operator ID and the password that you specified for this operator.
2. Launch the **Pega Marketing Portal**.
3. Click **Configuration > Settings > Application Settings**.
4. In the **Application Settings** window, click the **Manage Data Relationships** tab and click **Edit**.
5. In the **Customer Class Ruleset** field, enter the ruleset name PegaMKTComms-Artifacts and version 07-31-02.
6. In the **Customer Class Name** field, enter the customer class name PegaComm-Data-Customer-NBAMCCustomer and click **Save**.

Testing the installation

To verify the successful completion of the Pega Marketing for Communications installation process, complete the following steps.

Note: The testing process is only required if you have [installed the sample application](#) and have installed the Pega Foundation for Communications sample data. For more information, see the *Installation Guide* on the [Pega Foundation for Communications product page](#). In addition, to test the installation, you must have the Event simulator application user enabled. See [Enabling operator accounts](#).

1. Log in to your application by entering the EventUser@PMCSample operator ID and the password that you specified for this operator.
2. Click **Search Customers**.
3. In the drop-down menu, select a customer name.
4. In the **Event Name** drop-down menu, select an event.
5. Click the arrow in the **Trigger Event** column.

A message displays on the portal indicating that an event is triggered, which completes the test.