

**Pega Marketing
Installation Guide
7.4**



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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 begin the installation process, make sure that you complete all of the following tasks.

1. Ensure that you can stop and start the application server.
2. 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.
3. Install Pega Platform 7.4 or later, and then verify your installation as described in the *Platform Installation Guide* for your environment, available on the [Deployment Guides page](#).



Note: If you are installing on a UTF-8 encoded database, see [Issue: "Error: Commit failed" when loading CPM 6.1 RuleSets into a UTF-8 encoded database](#).

4. Apply any required hotfixes to the Pega Platform before proceeding with the Pega Marketing application installation. For a list of required Pega Platform hotfixes for Pega Marketing, see the [Pega Marketing Hotfixes page](#).
5. 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](#).
6. Before you install Pega Marketing, ensure that you have the following database information available:
 - Database connection information
 - Hostname or IP address
 - Database port
 - Database name
 - JDBC driver JAR file for your database type
 - PegaRULES schema name
 - PegaDATA schema name (if using split schema)
 - Pega Marketing external schema
 - This is the schema that contains your customer data repository and other marketing assets.
 - This schema must have the database privileges to create views and to select from tables in the PegaDATA schema.
 - Pega Marketing external user and password
 - This user must already exist.
 - This is the user that Pega Platform uses to connect to the Pega Marketing external schema.
 - This user must have full privileges to the Pega Marketing external schema.
 - This user must have the database privileges to create views and to select from tables in the PegaDATA schema.
 - Pega Deployment user and password
 - This user must already exist.
 - This is the user that the setup utility will use to connect to the database.
 - This user must have permissions to create and modify objects in all Pega schemas.


- (Oracle only) This user must have permission to create materialized views.
- User associated with PegaDATA DB rule
 - Set in application server configuration.
 - For Tomcat, this would typically be in the **context.xml** file.
 - The user mapped to the PegaDATA DB rule must already exist.
 - This user must have the following privileges on the PegaDATA schema:
 - **Select, Create, and Drop** on tables, indexes, and views
 - **Insert, Update, and Delete** on tables
 - **Alter** on tables and indexes
- User associated with PegaRULES DB rule
 - Set in application server configuration.
 - For Tomcat, this would typically be in context.xml.
 - The user mapped to the PegaRULES DB rule must already exist.
 - This user must have the following privileges on the PegaRULES schema:
 - **Select, Create, and Drop** on tables, indexes, and views
 - **Insert, Update, and Delete** on tables
 - **Alter** on tables and indexes
 - This can be the same as the PegaDATA user, provided the user has permissions to both schemas.

Installing the application

To install Pega Marketing, complete the following steps:

1. [Creating the ExternalMKTDData database rule](#)
2. [Importing the application bundles](#)
3. [Running the Pega Marketing Setup Utility](#)
4. [Deploying the Pega Marketing Help and Microsite WAR files on the application server](#)
5. [Restarting the application server](#)
6. [Required post-installation steps](#)
7. [Optional post-installation steps](#)
8. [Verifying installed rulesets](#)

Creating the ExternalMKTDData database rule

1. Log in to the Pega Platform (<https://<hostname>:<port>/prweb>) by entering the administrative ID that you set up when you installed Pega Platform, such as `administrator@pega.com`, and the password that you specified.
2. Click **Records** > **SysAdmin** > **Database**.
3. Click **Create**.
4. Enter the following information:
 - **Short description** - External Marketing Data
 - **Database** - ExternalMKTDData
5. Click **Create and open**.
6. On the Database tab, select the connection method from the **How to connect** drop-down list and enter the required connection information. The recommended connection method is JDBC connection pooling. For more information, see [JDBC Connection Pool syntax](#) and [JDBC URL syntax](#).
7. Click the **Advanced** tab.
8. In the section **List other databases that should be reachable by views in this database**, click **Add item**  to add a new row, and enter `PegaDATA` into the **Database Name** field.
9. Click the **Database** tab.
10. Click **Save**.
11. Click **Test Connection**.
 - [JDBC Connection Pool syntax](#)
 - [JNDI name syntax](#)
 - [JDBC URL syntax](#)

JDBC Connection Pool syntax

JDBC connection pooling is the recommended method to connect to your external database. As part of installing the core platform, a JDBC connection pool is usually configured in the application `config.xml` file.

See below for an example of the syntax on Tomcat. The data source in the example is set to `mktDataSource`.

```
<Resource name="jdbc/mktDataSource"
auth="Container"
type="javax.sql.DataSource"
driverClassName="oracle.jdbc.OracleDriver"
url="jdbc:oracle:thin:@<hostname>:1521:prpc"
username="<username>"
password="<password>"
/>
```

JNDI name syntax

If you want to use JDBC connection pooling to connect to your external database, specify the JNDI name. The required syntax for the JNDI name is `java:comp/env/jdbc/<Data Source>`. Replace `<Data Source>` with the name of the resource set in the `config.xml` file on the application server.

See below for an example of the syntax. The data source in the example is set to `mktDataSource`.

```
java:comp/env/jdbc/mktDataSource
```

JDBC URL syntax

If you want to use JDBC URL to connect to your external database, see below for the syntax used by different database types.

Oracle

```
jdbc:oracle:thin:@<hostname>:<port>:
<dbname>
```

PostgreSQL

```
jdbc:postgresql://<hostname>:<port>/<dbname>
```

MS SQL

```
jdbc:sqlserver://<hostname>:<port>;databaseName=<dbname>
```

IBM Db2

```
jdbc:db2://<hostname>:<port>/<dbname:fullyMaterializedLobData=true;
fullyMaterializeInputStreams=true;
progressiveStreaming=2;
progressiveLocators=2;
useJDBC4ColumnNameAndLabelSemantics=
false;
currentSchema=<Marketing External Schema>;
```


See below for an example of the syntax on IBM Db2. The database in the example is set to MYDB and the marketing external schema is set to MKTDATA.

```
jdbc:db2://localhost:50000/MYDB:fullyMaterializeLobData=true;
fullyMaterializeInputStreams=true;
progressiveStreaming=2;
progressiveLocators=2;
useJDBC4ColumnNameAndLabelSemantics=false;
currentSchema=MKTDATA;
```

Importing the application bundles

1. Log in to the Pega Platform (<https://<hostname>:<port>/prweb>) by entering the credentials that you specified when you installed this server.
2. Import the following bundles in the order they are listed below, following step 3 through step 7.
 - Rules/PegaMarketing_0740.zip. This contains the Pega Marketing framework application which consists of schema changes, JAR files, and rulesets required by Pega Marketing that are not shipped separately.
 - ⚠ **Important:** When you import the Rules/PegaMarketing_0740.zip, library compile errors appear in the log file. To resolve them, log out and restart the application server, then continue the import process.
 - Rules/PegaMarketing_Application_0740.zip. This contains the upgrade version of the Pega Marketing implementation application.
 - (If licensed) - Rules/PegaMarketing_FieldMarketing_0740.zip. This contains the Pega Field Marketing application and rulesets.
 - 📖 **Note:** Pega Field Marketing is required if you plan to use Pega Marketing with the [Pega Customer Relationship Management suite](#).
 - (If licensed) - Rules/PegaMarketing_MKTOperations_0740.zip.
3. To open the **Import wizard**, click **Designer Studio > Application > Distribution > Import**.
4. Click **Choose File**, browse for the file from your distribution media, and follow the wizard instructions. 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 7.4.
5. Based on the review of the database policies and application permissions that are used by your Pega Platform installation ([Prerequisites](#)), perform the appropriate step:
 - 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.
 - c) 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](#).

- 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](#).
- Apply any required hotfixes. For the list of required Pega Marketing hotfixes, see the [Pega Marketing Hotfix page](#).

Running the Pega Marketing Setup Utility

The Pega Marketing Setup Utility is used to run database scripts against your database. It can be run either interactively, or with a preconfigured `database.properties` file. It requires the appropriate JDBC driver file for your database.

This utility is located in the ResourceKit/setup folder. The steps that follow are relative to this folder.

- Copy the JDBC JAR file for your database to **ResourceKit/setup/core/lib**.
- To interactively create the properties file, skip to step 4.
- To use a preconfigured properties file, create the file `database.properties` in the ResourceKit/setup folder, and set the properties as appropriate for your database. The file `database.properties.template` describes each property. You can use it as a template when you create your file.
- Run the script **setup.bat** (Windows) or **setup.sh** (Unix/Linux). The utility validates the DB connection and generates scripts based upon the properties set in the `database.properties` file. The scripts are created under the **Generated** folder.
- After the scripts are generated, you are prompted to execute the scripts or cancel setup. You can review the scripts before executing them.
- After running the scripts, you can review the `run_sql_errors_<hostname>.log` file in the logs folder to make sure that there are no critical errors.

Deploying the Pega Marketing Help and Microsite WAR files on the application server

Update the Pega Marketing online help to the latest version by deploying the `MarketingHelp.war` file on the application server. If you want to use the Microsite functionality, deploy the `MS.war` file as well.

- Deploy the `WebArchives/MarketingHelp.war` file from your distribution media. For deployment information, see the [Pega Platform Installation Guide for your application server](#).
- Optional: Deploy the `WebArchives/MS.war` file from your distribution media. For deployment information, see the [Pega Platform Installation Guide for your application server](#).

Restarting the application server

At the end of the installation process, restart the application server.

- Log out of the Pega Platform.
- Stop and start the application server.

Required post-installation steps

After installing the application, you need to complete several configuration steps, such as granting database rights, configuring agents, and others described below.

- [Adding database grants](#)
- [Configuring and starting agent schedules](#)
- [Configuring Pega Marketing Help dynamic system settings](#)
- [Configuring the Decisioning DNode Cluster](#)
- [Verifying resource URLs](#)

Adding database grants

The user associated with the ExternalMKTDData schema must have grants to certain tables in the PegaDATA schema. From your database client, run the following statements:

ExternalMKTDData privileges

```
GRANT SELECT ON `${dataschema}.PR_DATA_CORR_SMS TO `${mktdatauser};
GRANT SELECT ON `${dataschema}.PR_DATA_CORR_EMAIL TO `${mktdatauser};
GRANT SELECT ON `${dataschema}.MKT_DATA_CORR_SMS TO `${mktdatauser};
GRANT SELECT ON `${dataschema}.pr_data_push_message TO `${mktdatauser};
GRANT SELECT ON `${dataschema}.pr_data_push_registration TO `${mktdatauser};
```



Note:

On IBM Db2 environments, use the following syntax instead:

```
GRANT SELECT ON `${dataschema}.PR_DATA_CORR_SMS TO USER `${mktdatauser};
GRANT SELECT ON `${dataschema}.PR_DATA_CORR_EMAIL TO USER `${mktdatauser};
GRANT SELECT ON `${dataschema}.MKT_DATA_CORR_SMS TO USER `${mktdatauser};
GRANT SELECT ON `${dataschema}.pr_data_push_message TO USER `${mktdatauser};
GRANT SELECT ON `${dataschema}.pr_data_push_registration TO USER `${mktdatauser};
```

Replace *`\${dataschema}* with the name of the schema referenced by the PegaDATA database rule, and *`\${mktdatauser}* with the name of the user associated with the ExternalMKTDData database rule.

Interaction History Data privileges

If the Interaction History tables are installed in a schema associated with a DB rule other than PegaDATA, for example PegaIHData, you must grant SELECT privileges on all Interaction History tables to the users and schemas associated with both the PegaDATA and ExternalMKTDData DB rules.

```
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_APPLICATION to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_CHANNEL to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_CONTEXT to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_CUSTOMER to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_JOURNEY to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_LOCATION to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_OPERATOR to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_DIM_OUTCOME to `${pegadatauser};
GRANT SELECT on `${ihdataschema}.PR_DATA_IH_FACT to `${pegadatauser};
```

```
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_APPLICATION to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CHANNEL to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CONTEXT to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CUSTOMER to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_JOURNEY to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_LOCATION to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OPERATOR to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OUTCOME to mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_FACT to mktdatauser;
```

**Note:**

On IBM Db2 environments, use the following syntax instead:

```
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CHANNEL to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CONTEXT to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CUSTOMER to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_JOURNEY to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_LOCATION to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OPERATOR to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OUTCOME to USER pegadatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_FACT to USER pegadatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CHANNEL to USER mktdatauser;
GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CONTEXT to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_CUSTOMER to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_JOURNEY to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_LOCATION to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OPERATOR to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_DIM_OUTCOME to USER mktdatauser;

GRANT SELECT on ihdataschema.PR_DATA_IH_FACT to USER mktdatauser;
```

Replace *ihdataschema* with the name of your IH schema, *pegadatauser* with the name of your PegaDATA user, and *mktdatauser* with the name of your External Marketing user.

Configuring and starting agent schedules

The agents included with Pega Marketing are provided disabled by default. After you restart the application server, enable the agent schedules.

1. Click **Records Explorer > SysAdmin > Agent Schedule**.
2. Open the agent schedule of each node on which you want to run the agent. This includes the following agents:
 - PegaMKT-Engine
 - PegaMKT-PushNotification
 - (If licensed) PegaMKT-FieldMarketing

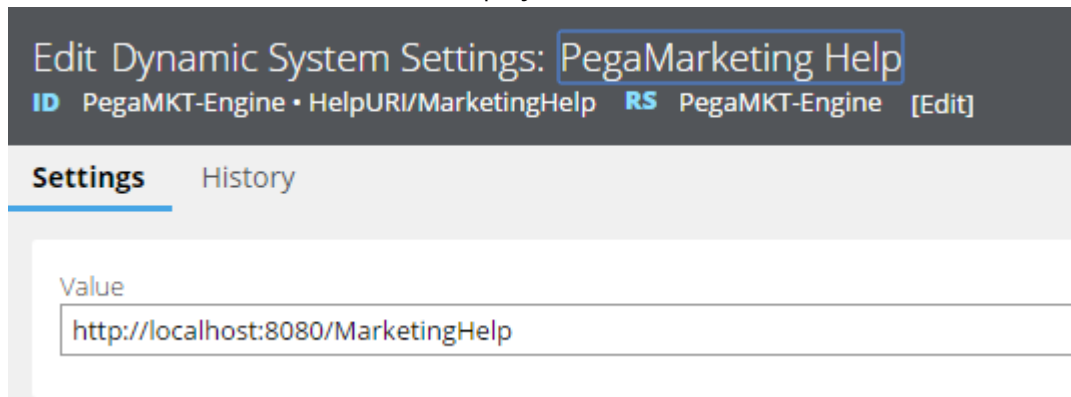


Note: Enable the agent RefreshCampaignOfferStats on only one node to avoid duplicate requests to refresh statistics.

- ServiceLevelEvents agent within the Pega-ProCom agent schedule
3. Check **Enable this agent** and ensure that each individual agent is enabled.
 4. Click **Save**.

Configuring Pega Marketing Help dynamic system settings

1. Click **Records Explorer > SysAdmin > Dynamic System Settings**.
2. Search for the **HelpURI/MarketingHelp** setting purpose.
3. Edit the value to point to the Pega Marketing Help application at the host and port where the **MarketingHelp.war** file has been deployed.



Configuring the Decisioning DNode Cluster

Confirm that the following DNodes have been created for the Decisioning services Decision Data Store, Adaptive Decision Manager, Data Flow, Real-time Data Grid, and Stream. If they have not, follow the steps below to add them.

1. Click **Designer Studio > Decisioning > Infrastructure > Services**.
2. On the Decision Data Store tab, click **Add node**. Select the node you want use as your decision data store.
3. On the Adaptive Decision Manager tab, click **Add node**. Select the node you want use as your adaptive decision data store.
4. On the Data Flow tab, add a node for each entry in the **Service** drop-down list.
5. On the Real-time Data Grid tab, click **Add node**. Select the node you want use for Real-time Data Grid.
6. On the Stream tab, click **Add node**. Select the node you want use for stream services.

Verifying resource URLs

1. Click **Designer Studio > System > Settings > URLs**.
2. On the Resource URLs tab, verify that the resource URLs are correct.
3. Verify that the public link URL can be accessed by an external user.
4. If you change the value of a resource URL, log off and log back in for the change to take effect.

Optional post-installation steps

The below configuration tasks are optional. Perform them only if you want to verify the sample Pega Marketing application.

- [Creating operator accounts for the sample application](#)
- [Updating Microsite authentication access](#)
- [Configuring Social Sentiment mappings](#)

Creating operator accounts for the sample application

If you want to use the sample Pega Marketing application, you need to create operator accounts with the required access group.

The sample application has the following default access groups:

PegaMarketing:MarketAdmins

This is an access group for administrators. The default portal for operators in this access group is the Pega Marketing portal in Express administrative mode. This access group also grants access to Design Studio.

PegaMarketing:MarketManagers


This is an access group for managers. The default portal for operators in this access group is the Case Manager portal. This access group also grants access to the Pega Marketing portal.

PegaMarketing: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.

Create operator accounts for users of your sample Pega Marketing application and assign them to the predefined user groups. If you want to create operator accounts for users of your implementation application, see the *Pega Marketing Implementation Guide* on the [Pega Marketing product page](#).


1. Log in as a Pega Platform administrator.
2. Create an operator account with one of the predefined Pega Marketing access groups. For more information, see [Operator ID data instances - Completing the Create or Save As form](#). Keep in mind the settings specific to Pega Marketing operators, as described below.
3. In the **Access settings** section on the **Security** tab, select **Allow rule checkout**.
4. Click **Update password** and enter the password for this operator, then click **Submit**.
5. Click **Save**.
6. Log off and log in as the operator you created.
7. Disable the **Auto checkout on save as** setting in the operator preferences. 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 you previously entered.

Updating Microsite authentication access

If you want to use the Microsite functionality, create an operator account with the required access group PegaMKT:Unauthenticated.

1. Click **Designer Studio** > **Org & Security** > **Groups & Roles** > **Access Groups**.
2. Search for and edit the PegaMKT:Unauthenticated access group.

3. In the **Application** section, select your implementation application in the **Name** field.
4. Make sure that the destination artifact ruleset is selected.
5. Click **Save**.
6. Click **Designer Studio > System > General > Systems, Nodes, Requestors**.
7. In the **Requestors** table, click the BROWSER requestor for your current system.
 -  **Note:** Your current system name is displayed in the **System Name** field above the table.
8. Set the **Access Group Name** for the BROWSER requestor to `PegaMKT:Unauthenticated`.
9. Click **Save**.
10. Click **Records > SysAdmin > Dynamic System Settings > Create**.
11. Enter the following values and click **Create and Open**:
 - **Short description** - `PegaMKT-Engine microsite/URL`
 - **Owning Ruleset** - `PegaMKT-Engine`
 - **Setting Purpose** - `microsite/URL`
12. Enter the URL of the IAC servlet into the **Value** field, in the format `http://<hostname>:<port>/prweb/IAC`.
13. Click **Save**.
14. Create a new operator account. In the **Access Group** section on the **Profile** tab, enter or select `PegaMKT:Unauthenticated`.
15. To let the Microsite authentication functionality know about the new operator, create a new dynamic system setting.
 - a) Click **Records > SysAdmin > Dynamic System Settings > Create**.
 - b) Enter the following values and click **Create and Open**:
 - **Short description** - `PegaMKT-Engine microsite/parameters/useridentifier`
 - **Owning Ruleset** - `PegaMKT-Engine`
 - **Setting Purpose** - `microsite/parameters/useridentifier`
 - c) Enter the name of the operator you created in step 13 into the **Value** field.
 - d) Click **Save**.

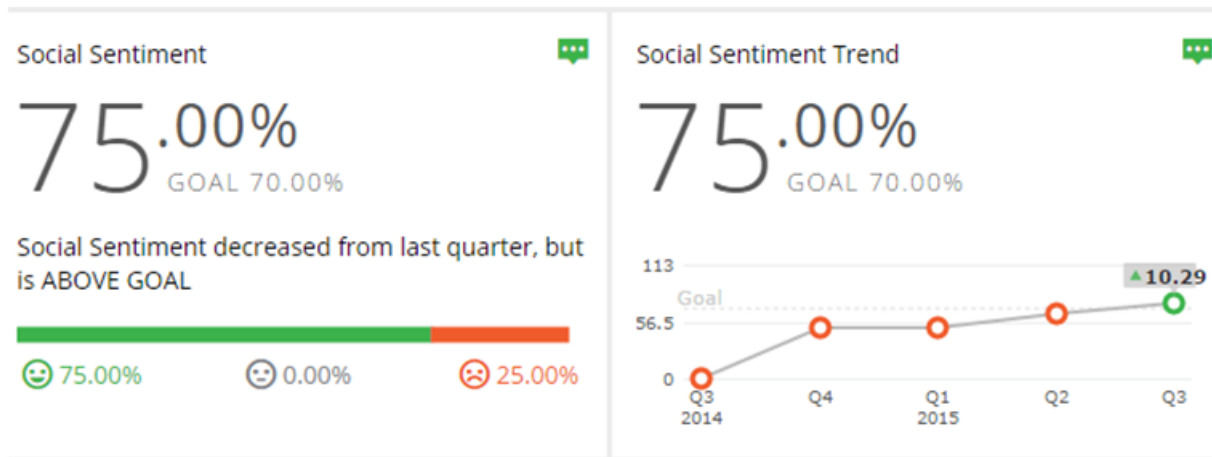
Configuring Social Sentiment mappings

If you are licensed to use Pega Social, configure the Social Sentiment mappings.

1. If you have not done so already, register a Twitter app for your Twitter account on the Twitter apps portal. This step is required to obtain the OAuth settings used in step 2 below.
2. Click **Save As** to save the following rules into the PegaNBAMRules ruleset. Do not change the name of the rules.
 - `TwitterSocialSentiment`
 - a. Fill out the required OAuth settings:
 - Consumer key
 - Consumer secret
 - Access token

- Access token secret
 - b. In the **Search keyword(s)** section, add a keyword for each Twitter handle that you want to monitor. The keyword for the handle must include the @ symbol).
 - DFTwitterSocialSentiment
 - FTMTwitterSocialSentiment
3. Open DFTwitterSocialSentiment.
 4. Under the **Actions** menu, click **Run**.
 5. Click **Activate**. This starts the listening process.

Social Sentiment widgets on the Pega Marketing dashboard now display your data.



Verifying installed rulesets

The following lists the highest level ruleset versions loaded by the installation process. Verify that your system includes these ruleset versions. If your system does not contain the following rulesets, the installation procedure was not successful.

1. Click **Designer Studio > Application > Structure > RuleSet Stack**.
2. Verify that the following ruleset versions are listed:
 - PegaMarketing:7.4 (or your implementation application)
 - PegaNBAM-Artifacts:07-11-01
 - PegaNBAM-Rules:07-11-01
 - PegaMarketing_FW:7.4
 - PegaMKT-Install:07-40
 - PegaMKT-MarketingProfile:07-40
 - PegaMKT-Portal:07-40
 - PegaMKT-Desktop:07-40
 - PegaMKT-RevisionManagement:07-40
 - PegaMKT-Engine:07-40
 - PegaMKT-Integration:07-40
 - PegaMKT-MailUtilities:07-40

- PegaMKT-Passbook:07-40
 - PegaMKT-PushNotification:07-40
 - PegaMKT-Security:07-40
 - PegaMarketing_FW_PreReqs:7.4
 - PegaFW-NPS:07-13-99
 - PegaFW-DashboardCharts:01-01-03
 - Pega-IAC:07-10-36
 - UIKit:11.01
 - UI-Kit-7:11-01-01
 - PegaDM:07.10
 - Pega-DecisionManager:07-10-36
 - PegaRULES:07.10
 - Pega-ProcessCommander:07-10-99
3. If your system does not contain the latest rulesets, it indicates that the installation procedure was not completed successfully.
- a) Use the [Log files tool](#) to review any errors or warnings that occurred.
 - b) If applicable, take appropriate action to correct any existing system conditions that prevented a successful installation.
 - c) After you correct the conditions, import the JAR files again and then verify the rulesets.
 - d) If you cannot correct the conditions that cause the error, restore your system from the backup and see if this corrects the condition.
 - e) If you are unable to resolve the situation, go to [My Support Portal](#) to request appropriate assistance.

Verifying the sample application

If you want to use the Pega Marketing sample application, log in to the Pega Marketing portal to verify that the installation process has completed successfully.

1. Log in to your application as a user with the PegaMarketing:MarketAnalysts access group.
2. Verify that you can view the Pega Marketing portal.

