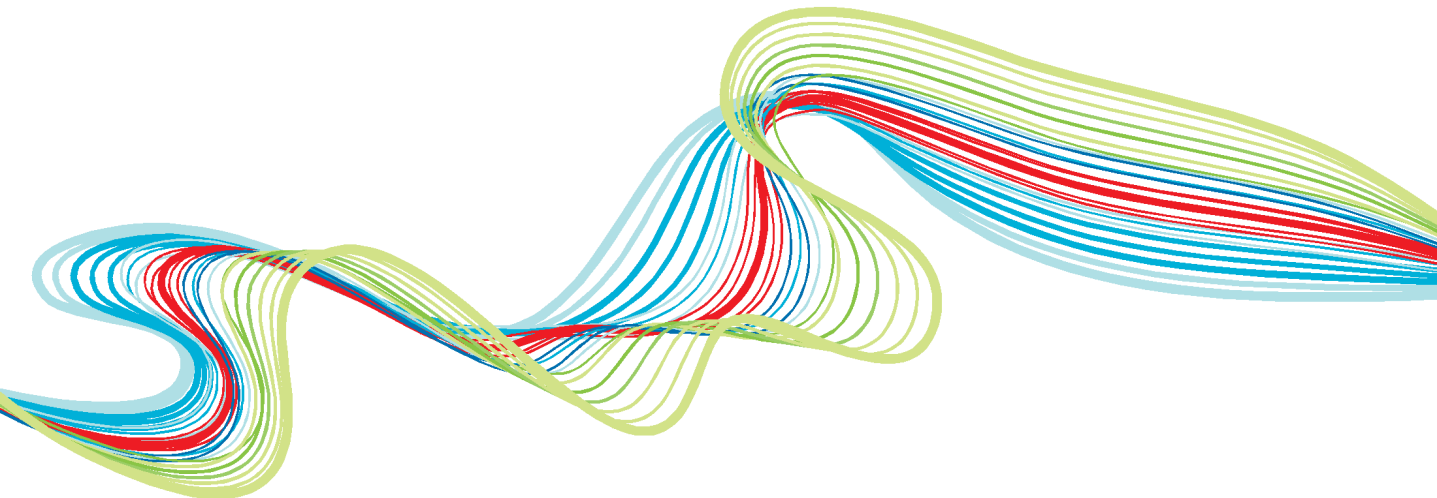
XM PIE

PersonalEffect®

uProduce™ Marketing Console Administrator Guide

Version 2.3



one to one in one™

Notices

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U.S. Patent 6948115, 7406194, 7548338, 7757169 and pending patents.

JP Patent 4406364B and pending patents.

uProduce™ Marketing Console Version 2.3 Administrator's Guide, Document Revision: 1.67, February 2014

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Preface

XMPie®, A Xerox Company, is the leading provider of software for cross-media, variable data one-to-one marketing. Its solutions help businesses create and manage highly-effective cross-media campaigns, leveraging their market and customer information to achieve dramatic returns on their marketing investments.

uProduce™ Marketing Console is the XMPie revolutionary software solution for redefining Campaign performance. The Marketing Console provides sophisticated real-time tools for measuring the success of a marketing campaign, based on campaign variables (ADOR Objects), Cross Media events and actions. With the XMPie solution, organizations can *track* cross-media campaign activities and save them into a consolidated database; *analyze* the tracked information in real-time, using a Web-based console; and then *refine*, optimize and enhance the current or next phases of the campaign accordingly. The analysis and refinement steps, geared to enhance response rate and ROI, can be done by the service provider as well as its customers.

Marketing Console is available in three editions:

- Premier and Signature Editions—provide the complete set of features, the Professional Service Level, typically used by premium end-customers. The administrator can alternatively define an entry-level set of features, the Standard Service Level, for other end-customers. The Premier edition also offers support for customized branding, tracking API and MC mobile application.
- Express Edition—provides only the entry-level features, the Standard Service Level.

This guide applies to all editions. It explains how to install and configure Marketing Console, in order to view and analyze your tracked campaign events.

Audience

This guide is intended for administrators who need to install Marketing Console, configure its Service Level (for Premier and Signature Editions) and define the roles of its users.

The administrators are expected to be familiar with uProduce and to have basic knowledge of system administration tasks.

Document Conventions

This document uses the following typographical conventions:

- A backslash (\) is used to separate directories in a path.
- **Bold** Tahoma font is used to indicate on-screen interaction elements, including window captions, buttons, fields, check boxes, selection lists, and so forth.
- *Italics* are used to emphasize important terms and concepts.
- The `courier` font is used for sample code and code listings.
- The "Take Note" icon ( ) is used to ensure useful information, clarifications and tips are noticed.
- The "Professional" icon ( ) is used to indicate Professional Service Level features, available with the Signature and Premier Edition of Marketing Console.

About XMPie

XMPie®, A Xerox Company, is the leading provider of software solutions for Individualized Communications Management (ICM) and uniquely enables users to leverage customer information to efficiently and effectively manage 1:1 multichannel communications for higher response rates and dramatic ROI. XMPie software leverages the Adobe® platform and offers a broad range of capabilities that contribute to the full scope of ICM: uDirect® creative tools for desktop design of variable data print and personalized video; PersonalEffect®

eMedia Cloud for hosted, off-premises, cross-media campaigns; PersonalEffect turn-key systems for server-based dynamic print, Web-to-print portals, and integrated cross-media communications; XMPie Platform solutions for custom and robust, multi-server, enterprise-class deployment; Circle®, a cloud-based application to visualize, create, plan, manage and measure 1:1 multichannel communications campaigns. Add-on modules for custom configurations are available, including uImage® for image and graphics personalization; uStore® for personalized Web-to-print applications; uChart® for dynamic charts and graphs; XMPie e-Mail Service™ for personalized email delivery and tracking; PersonalEffect Analytics for reporting and analysis of campaign performance. XMPie is headquartered in New York with an R&D center in Israel, and sales, support and professional service operations in the U.S., Europe and Asia Pacific. For more information, visit www.xmpie.com.

Chapter 1: Marketing Console Installation

Overview

Marketing Console consists of three components:

- **Website**—the Marketing Console Website application.
- **Web Services**—the Marketing Web Services API layer, required by the Marketing Console Website to perform some of the processing.
- **Marketing Console SQL Server Components**
  - **Reporting Services Web Service**—the Report Definition Language (RDL) reports.
  - **Marketing Console Windows Service** —the service required for Database Maintenance tasks and Write Back operation.

To run the Marketing Console, all three components must be installed.

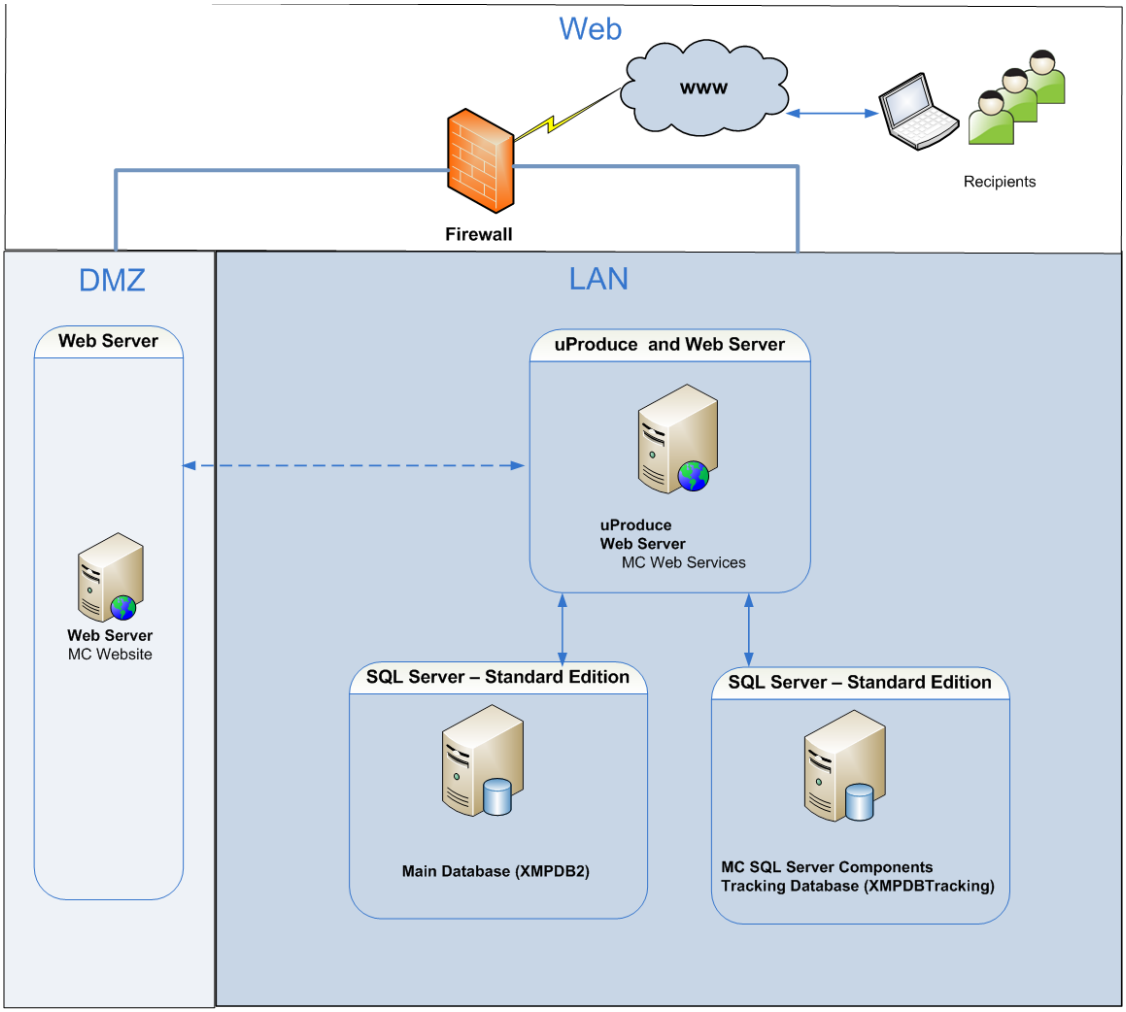
Marketing Console works closely with *uProduce*. It retrieves user information from the *Main Database*, and retrieves tracked Campaign data from the *Tracking Database*. When you install Marketing Console, you are required to configure its connection to your existing uProduce Server and databases.

Attention: *Marketing Console version 2.2 or above is compatible with uProduce 6.0 or above.*

Marketing Console, uProduce and the databases may be deployed in several ways. This guide covers the three common installations: two Distributed Installations, in which the Website and Web Services are installed separately from the Reporting Services Database; and a Standalone Installation, in which all components are deployed on the same machine.

It is recommended to perform a distributed installation, in which the system components are divided between three servers, and all databases reside on a dedicated SQL Server® (Figure 1).

Figure 1: Recommended Distributed Installation—All Databases on a Dedicated SQL Server



Note: *If uProduce Main Database (XMPDB2) and Tracking Database (XMPDBTracking) are installed on two different database instances, they must have identical collation.*

System Requirements

A summary of the system requirements for Marketing Console is displayed in Table 1.

Table 1: System Requirements

HW/SW	**Requirements** Recommended [Minimum]		
Operating System*	Windows Server 2008 R2 Standard Edition SP1 OR Windows Server 2012** OR Windows Server 2012 R2**		
Processor	Quad-core Intel Xeon and above (two processors on Solo)		
Upgrade Free Minimum Disk Space	40 GB (for Small to Medium Databases)		
Memory	**Machine**	**RAM (Total)**	**RAM Allocation for SQL Server**
	MC Application/MC-API without SQL Server	2GB	N/A
	Solo PersonalEffect with Campaigns with Recipient Count < 10,000	8GB	1GB
	Dedicated SQL Server Standard with Campaigns of Recipients Count < 500,000	8GB	5.5GB
	Dedicated SQL Server Standard with Campaigns of Recipients Count > 500,000	16GB	12GB

HW/SW	Requirements Recommended [Minimum]
SQL Server* (with Reporting Services installed)	SQL Server 2008 R2 Standard Edition or above OR SQL Server 2012 SP1 Standard Edition or above OR [SQL Server 2008 R2 Express Edition*** with Advanced Services]
uProduce	uProduce version 6.0 and above
.NET Framework	2.0 AND 4.0 (.Net 3.5 is also necessary for SQL Server 2008 R2 and SQL Server 2012 SP1 installation)

* All machines on which PersonalEffect system is installed must run on the same operating system. A blend of different operating systems is not supported.

** Windows Sever 2012 and Windows Server 2012 R2 are only supported if PersonalEffect 6.2 or above is installed.

*** Note that the Enhanced Reports can only be shown on systems with SQL Server Standard and above.

Attention: *The Windows operating system must be genuine and activated before Marketing Console is installed.*

Browser Support

Marketing Console supports the following Internet browsers:

Windows:

- Internet Explorer 9, 10, 11
- Firefox 23
- Chrome 29

Mac:

- Safari 6
- Firefox 16

PE Analytics Licenses

The PE Analytics License governs the PersonalEffect and Marketing Console feature set.

There are three PE Analytics licenses available:

- PE Analytics Premier
- PE Analytics Signature
- PE Analytics Express

The following table summarizes the differences between the PE Analytics licenses:

Table 2: Express, Signature and Premier Licenses

	PE Analytics Premier	**PE Analytics Signature**	**PE Analytics Express**
Charting	Enhanced*	Enhanced*	Plain
Branding per-Customer	Yes	No**	No**
Mobile Application	Yes	No	No
Tracking API	Yes	No	Yes

* Enhanced charting is only shown if the system uses SQL Server Standard Edition or above; with SQL Server Express charting falls backs to Plain mode.
** A single system-wide branding applies to all accounts.

Adding a PE Analytics License

The license key must be installed *before* running the Marketing Console installer. Regardless of whether you are performing a standalone (Solo) installation or a distributed installation, in which the Marketing Console components are divided among different machines, the PE Analytics license must only be installed on the machine running uProduce. When upgrading Marketing Console to a higher version, there is no need to add the new license (see Upgrade Procedure on page 7).

For instructions on installing the XMPie licenses, please refer to the *uProduce Installation Guide*.

Once the license is installed, you can run the Marketing Console installer.
The same installer is used to install all Marketing Console Editions.
The Edition that is installed depends on the license you have added.

Upgrade Procedure

The upgrade procedure slightly varies according to your current version number and installation type:

- **Upgrade from version 2.1 or 2.2 (32 bit and 64 bit)**

  The standard upgrade procedure is described in Upgrading from version 2.1 or 2.2 to higher versions below.

- **Upgrade from version 2.0.1 32 bit**

  The standard upgrade procedure is described in Upgrading from version 2.1 or 2.2 to higher versions below.

- **Upgrade from version 2.0.1 64 bit**

  The upgrade procedure for 64 bit versions involves uninstalling the old version and installing the new one.

  - To uninstall Marketing Console, see the *Marketing Console Administrator's Guide* for version 2.0.1.
  - To install a new version of Marketing Console, see Installation Procedures on page 12.

- **Upgrade from versions lower than 2.0.1**

  If you wish to upgrade from a version lower than 2.0.1, you will need to install Marketing Console 2.0.1 first (see the *Marketing Console Administrator's Guide* for version 2.0.1).

Upgrading from version 2.1 or 2.2 to higher versions

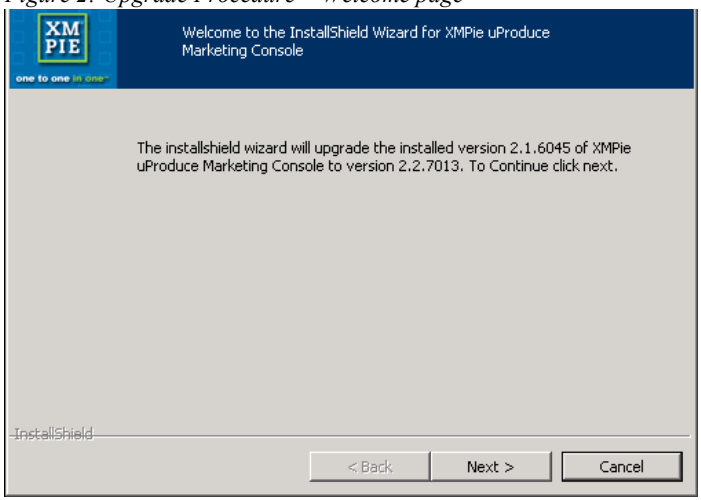
1. Backup all XMPie databases before beginning an upgrade.
2. Upgrade the .NET to .NET 4.0 framework. Below is the link for Microsoft .NET Framework 4 (Web installer): http://www.microsoft.com/downloads/en/details.aspx?FamilyID=9cfb2d51-5ff4-4491-b0e5-b386f32c0992&displaylang=en.

   Please note that during the installation of .NET 4.0 the installer will prompt you to reboot your computer. You must reboot in order to activate .NET 4.0.
3. Double-click the Marketing Console installation file (**XMPie Marketing Console V2.3 Build xxxx.exe**).

   Note: *If you are not running in the administrator mode, right-click the file and choose Run as administrator.*

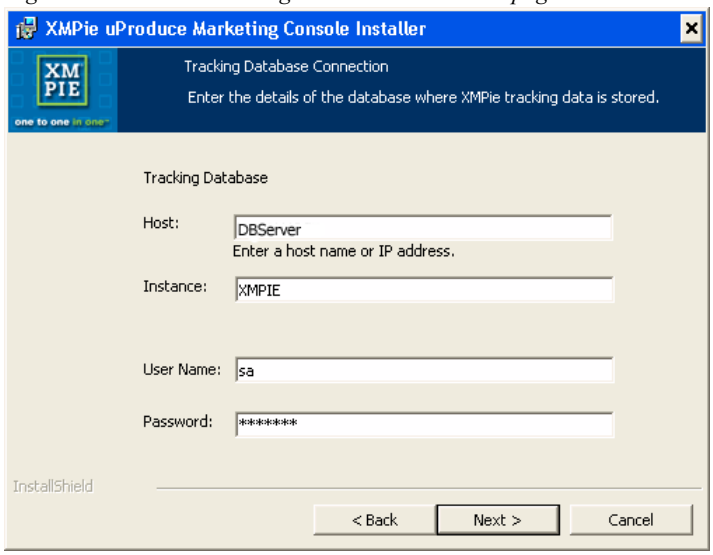
4. In the **Welcome** page, click **Next**:

Figure 2: Upgrade Procedure— Welcome page



5. If you are upgrading an installation including SQL Server Components or Web Services, the **Tracking Database Connection** page is displayed. If the installation does not include the SQL Server Components or Web Services, skip to step 7.

Figure 3: Installer—Tracking Database Connection page



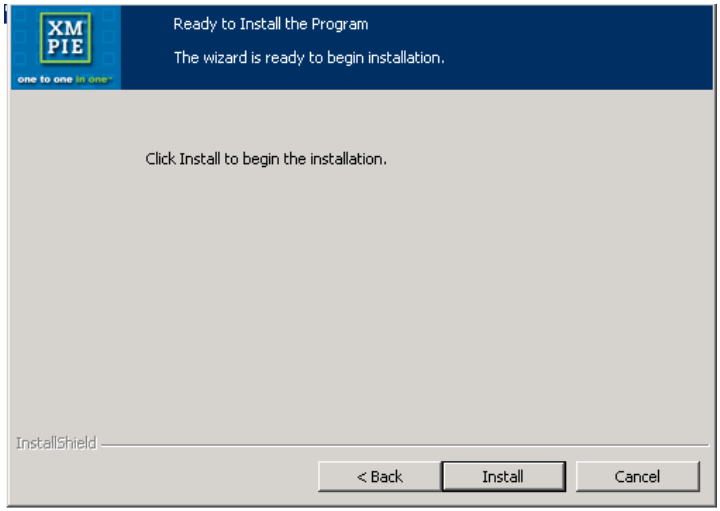
In the **Tracking Database Connection** page, specify the following details of the SQL Server that stores XMPie Tracking Database (`XMPDBTracking`), and then click **Next**:

- The server name or the IP address of the **Host** machine (do not use localhost or 127.0.0.1)
- The name of this SQL Server **Instance**
- The **User Name** and **Password** for logging into this SQL Server instance.

Note: *This password is not saved, and is used only during the installation phase.*

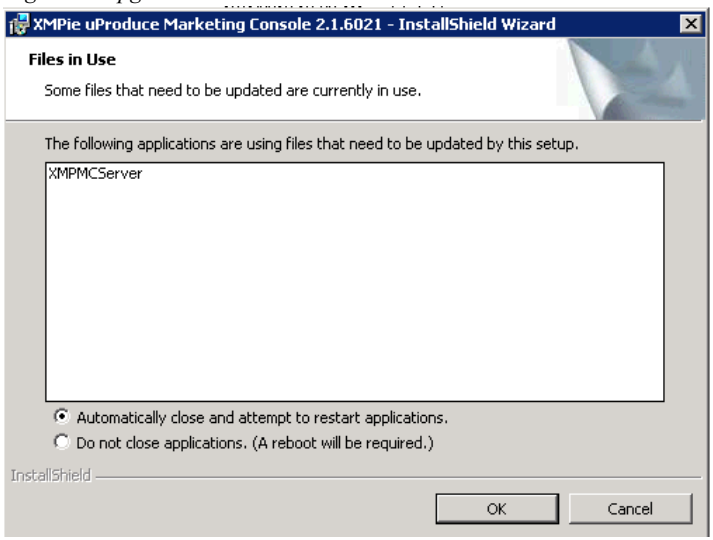
6. Click **Next**.
7. In the **Ready to Install** page, click **Install** to proceed with the upgrade.

Figure 4: Upgrade Procedure—Ready to Install page



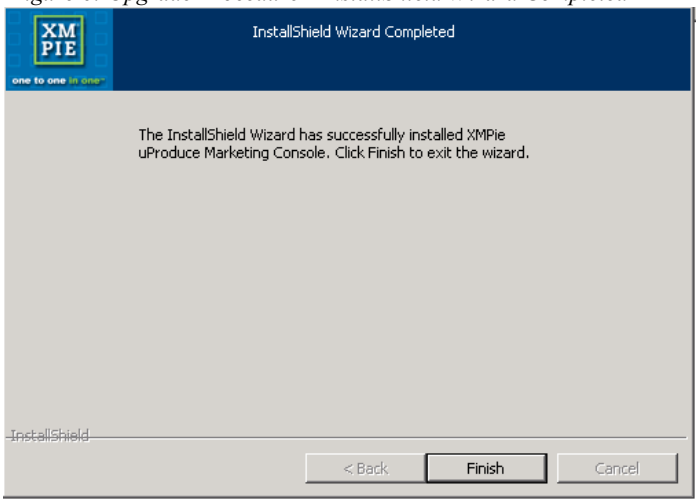
8. In the **Files in Use** page, click **OK**.

Figure 5: Upgrade Procedure—Files in Use



9. The upgrade process will run automatically. A success window will be displayed once the upgrade is successfully completed:

Figure 6: Upgrade Procedure—InstallShield Wizard Completed



10. Click **Finish** to quit the installation wizard.

Installation Procedures

This section describes the following installations:

- a Standalone Installation
- a Clustering Database Installation.

Installation File

To install the Marketing Console application, run the **XMPie Marketing Console V2.3 Build xxxx.exe** generic installation file.

Note: *This version there is a unified installer for both 32bit and 64bit platforms.*

SQL Server Installation Prerequisites

All the installation procedures require a Microsoft SQL Server 2008 R2, 32 or 64 bit or Microsoft SQL Server 2012 SP1. The installation documents for SQL Server can be found at: http://www.xmpie.com/docreferences. Choose one of the following SQL Server Editions:

- Express Edition with Advanced Services for SQL Server 2008 R2
- Standard Edition (or above)

Note: *Whether you install the Express or the Standard Edition, make sure you install the Reporting Services.*

Distributed Installations

You can choose between two distributed installations, in which the Website and Web Services components are installed separately from the Reporting Services Database:

- In the recommended installation, all databases reside on a dedicated SQL Server.
- In the alternative installation, the Main Database (`XMPDB2`) resides on the uProduce Server.

Distributed Installation Prerequisites

In distributed environments, the system runs in separate networks: the local area network (LAN) and the demilitarized zone (DMZ). This requires opening ports and editing the Server's Hosts.

Opening Ports from the Web Service Machine to the Database Machine

If the Web Services are installed in the DMZ and the SQL Server is in the LAN, open the TCP-12881 port in the firewall from the Web Service machine to the SQL Server machine. This port provides access for Marketing Console Web Services to SQL Server machine.

Opening Ports from the Database Machine to the Web Service Machine

If the Web Services are installed in the DMZ and the SQL Server is in the LAN, allow the TCP-80 port in your firewall from the SQL Server machine to the Web Service machine.

Editing the Server's Hosts File

To access the Report Server and the Marketing Console Web Services by name, both from the LAN and from the DMZ, you are required to edit these machines' definitions in the Server's `hosts` file (`C:\WINDOWS\system32\drivers\etc\hosts`):

Note: *In order to modify the hosts file you must have administrative privileges.*

The **machine names** specified in the `hosts` file for the Report Server and Marketing Console Web Services should match the computer names of the respective machines as they are known to the edited machine network.

For example:

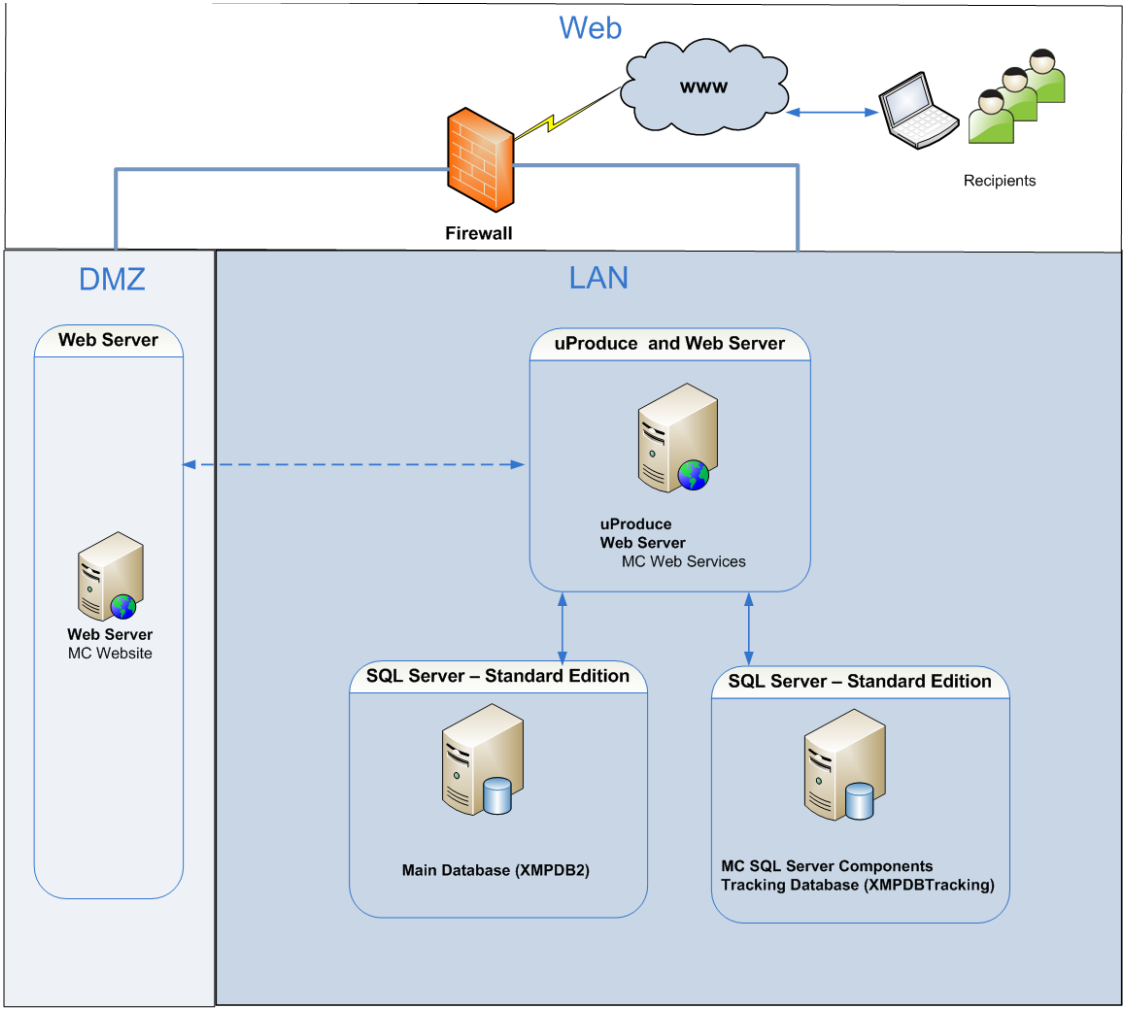
- `192.168.35.10 MCWebServicesServer`
- `192.168.35.11 DBReportServer`

Later, in the Marketing Console installer, identify the Report Server and Marketing Console Web Services by entering their names (rather than their IP addresses).

Recommended Distributed Installation

This installation places all databases on two dedicated SQL Servers (Figure 7).

Figure 7: Recommended Distributed Installation—All Databases on a Dedicated SQL Server



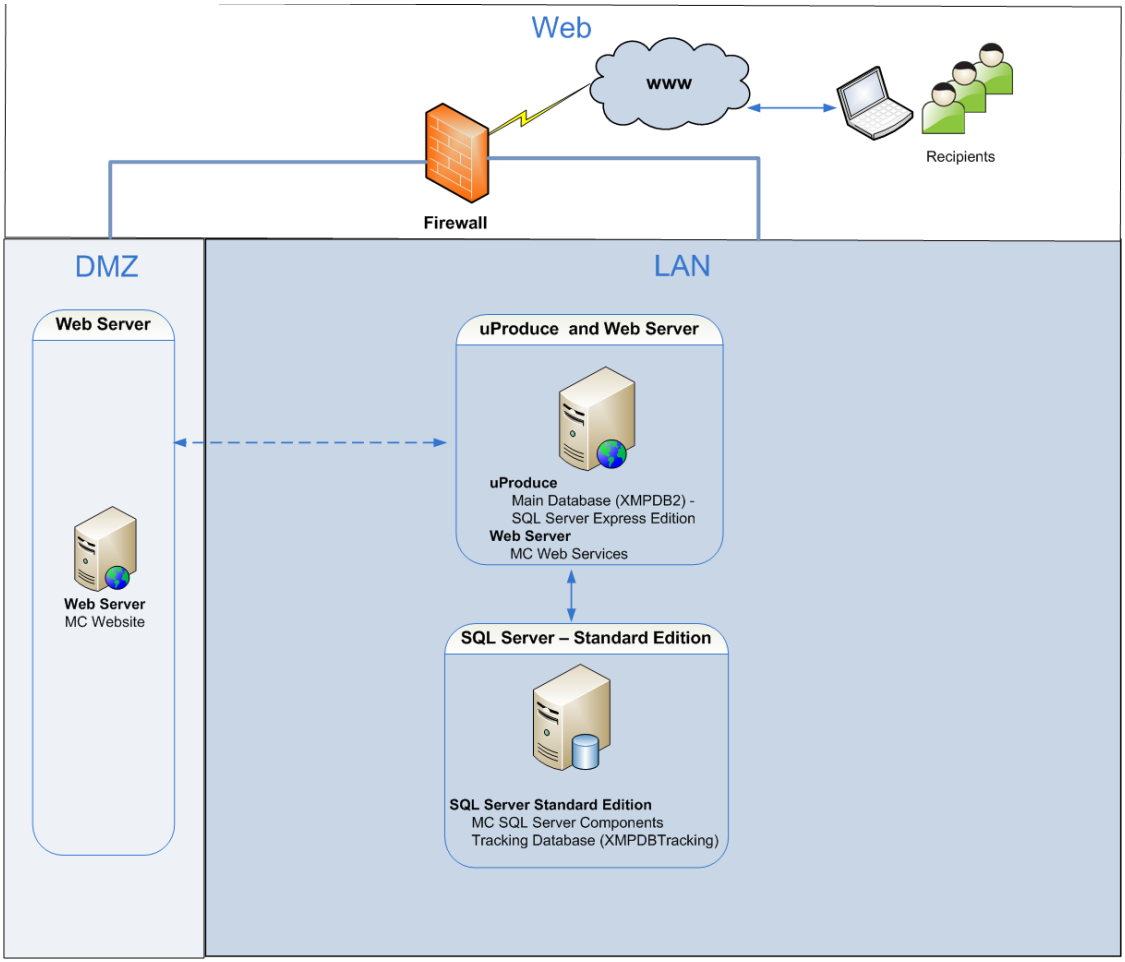
The system components are installed as follows:

- The **MC Website** component is installed on a dedicated *Web Server* in DMZ.
- The **Web Services** component is installed on the *uProduce Server (Web Server)* in *LAN*.
- The uProduce **Main Database** (`XMPDB2`) component is installed on another dedicated SQL Standard Edition database machine.
- The **MC SQL Server Components** component and the **Tracking Database** (`XMPDBTracking`) are installed separately, on a dedicated SQL Standard Edition database machine.

Typical Distributed Installation

This configuration is useful when you already have a uProduce installation, in which all components (including the Main Database, XMPDB2) reside on the uProduce machine, and you wish to add Marketing Console to your existing system without moving the Main Database (Figure 8).

Figure 8: Alternative Distributed Installation—uProduce and the Main Database on the Same Server



The system components are installed as follows:

- The **MC Website** component is installed on a dedicated *Web Server* in DMZ.
- The **Web Services** component and the uProduce *Main Database* (`XMPDB2`) are installed on the *uProduce Server (Web Server)* along with SQL Server Express Edition in *LAN*.
- The **MC SQL Server Components** component and the **Tracking Database** (`XMPDBTracking`) are installed separately, on a dedicated SQL Standard Edition database machine.

Whether you choose the recommended or the typical distributed installation, you are required to perform the same procedures, in the following order:

1. SQL Server Components Installation and Configuration (page 17)
2. Web Services Installation – LAN Web Server Machine(page 27)
3. Web Site Installation (page 27) (Web Site Installation – DMZ Web Server Machine on page 36)

SQL Server Components Installation and Configuration

Prior to installing the Marketing Console SQL Server Components, you must first install the SQL Server Standard Edition or SQL Server Express with Advanced Services. Both Database Engine Services and the Reporting Services features are required for the installation of Marketing Console SQL Server Components. Please refer to the SQL Server installation guide at http://www.xmpie.com/docreferences.

Marketing Console SQL Server Components Installation – Tracking Database Machine

The installation of the Marketing Console SQL Server Components performs the following:

- Marketing Console Windows Service (*XMPMCServer*) is installed (see Marketing Console Windows Service Configuration on page 26).
- Marketing Console Reports are added to the SQL Reporting Services.
- Tracking database (**XMPDBTRACKING)** is created and updated.
- An XMPie uProduce connection string is installed in the registry.

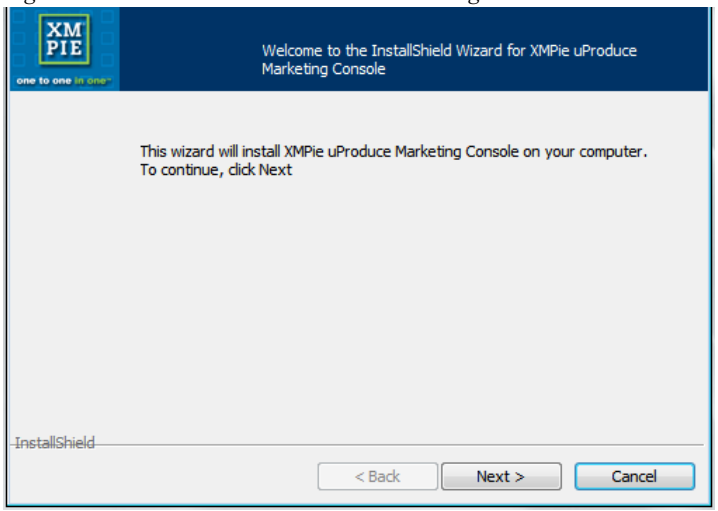
To install Marketing Console SQL Server Components:

1. Double-click the Marketing Console installation file (**XMPie Marketing Console Vx.x Build xxxx.exe**).

Note: *If you are not running in the administrator mode, right-click the file and choose Run as administrator.*

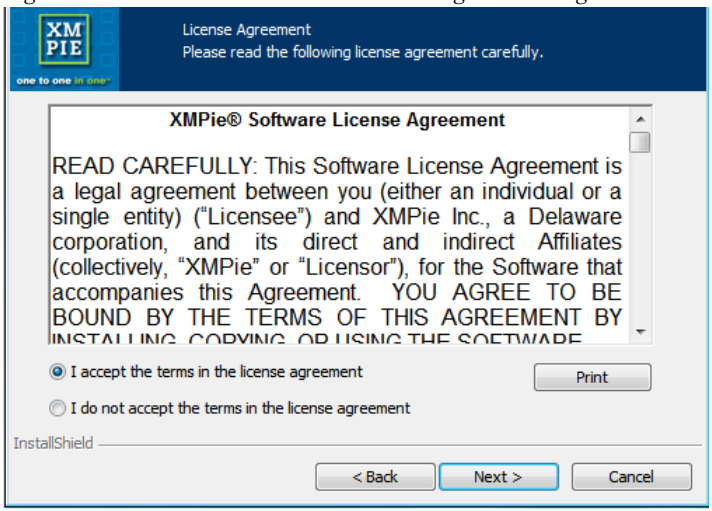
2. In the **Welcome** page, click **Next**.

Figure 9: Distributed Installation—Welcome Page



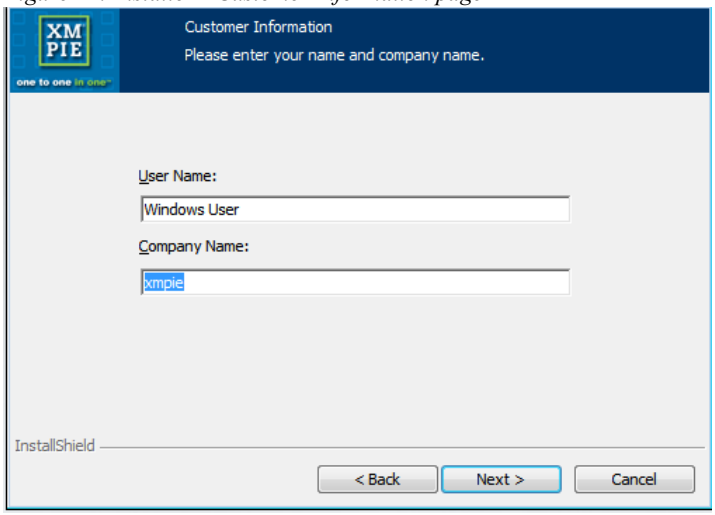
3. In the **License Agreement** page, accept the license agreement and click **Next**.

Figure 10: Distributed Installation—License Agreement Page



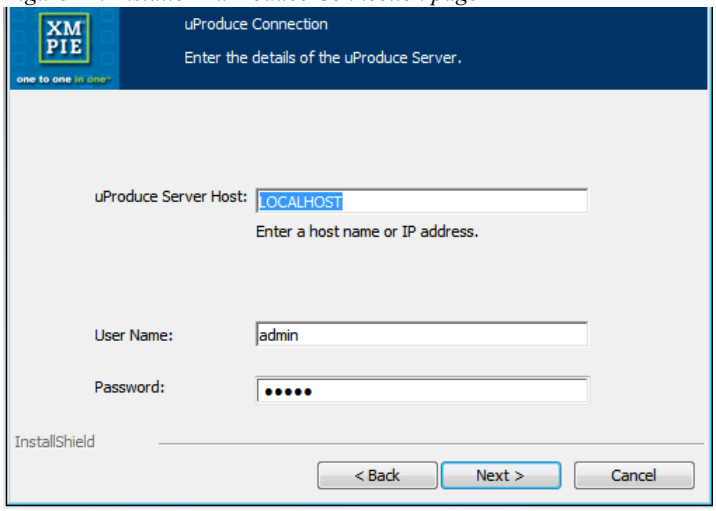
4. In the **Customer Information** page (Figure 11), enter the **User Name** and the **Company Name** of the customer who owns this Marketing Console, and click **Next**.

Figure 11: Installer—Customer Information page



5. In the **uProduce Connection** page (Figure 12), specify the following and then click **Next:**
   - The host name or IP address of the **uProduce Server Host** machine
   - The **User Name** and **Password** for logging into the uProduce Server

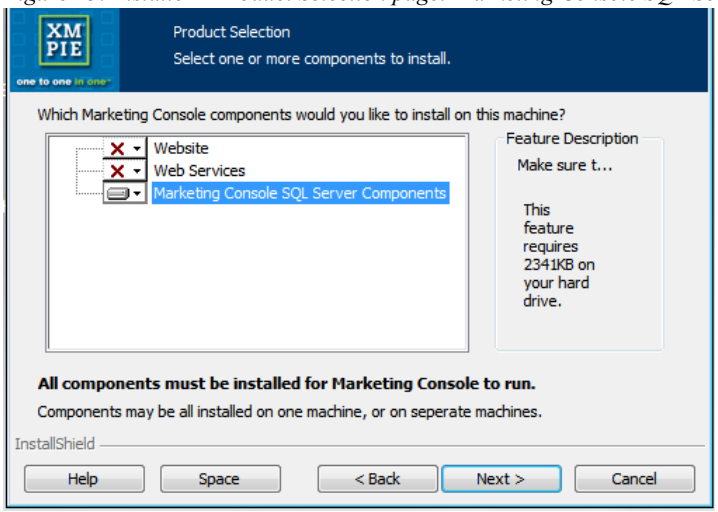
Figure 12: Installer—uProduce Connection page



6. In the **Product Selection** page (Figure 13), set the **Marketing Console SQL Server Components** component to be the only component installed:

   By default, all three components are set to be installed. To exclude the **Website** and **Web Service** from this installation, set their drop-down lists to: **This feature will not be available**, and click **Next**.

Figure 13: Installer—Product Selection page: Marketing Console SQL Server Components

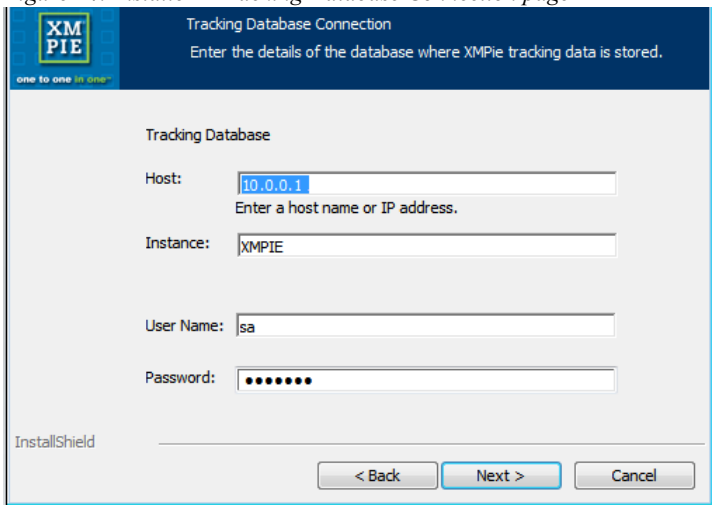


7. In the **Tracking Database Connection** page (Figure 14), specify the following details of the SQL Server that stores XMPie Tracking Database (`XMPDBTracking`), and then click **Next**:

   - The server name or the IP address of the **Host** machine (do not use localhost or 127.0.0.1)
   - The name of this SQL Server **Instance**
   - The **User Name** and **Password** for logging into this SQL Server instance.

Note: *This password is not saved, and is used only during the installation phase.*

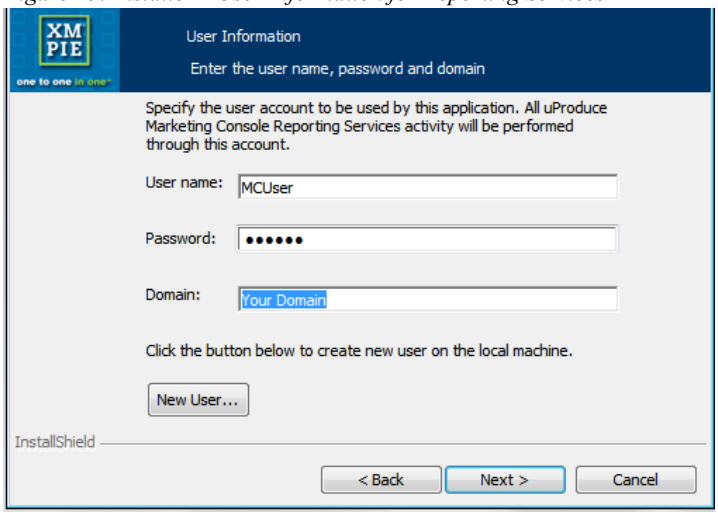
Figure 14: Installer—Tracking Database Connection page



8. In the **User Information** page (Figure 15), fill in the user details, as described below. Please take into consideration the following two scenarios:

   - If Marketing Console is installed in a Workgroup environment, click the **New User** button and proceed to step 9.
   - If Marketing Console is installed in a Domain Network environment, fill in the **User Name**, **Password** and **Domain** fields of the domain user with administrative privileges to the Reporting Services Server (not a local user). Click **Next** to proceed to step 10.

Figure 15: Installer—User Information for Reporting Services

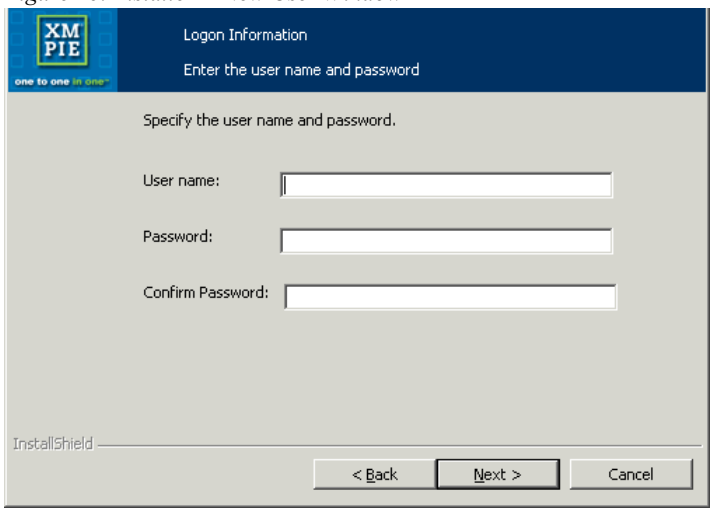


9. Enter the following account information:

   - Under **User Name**, type: `MCUser` (the user name is not case sensitive). If the user name is already in use, please choose another random name.
   - Type your password in the **Password** box and retype it in the **Confirm Password** box.

The installer will make the newly created local account a member of the server's Local Administrators' Group.

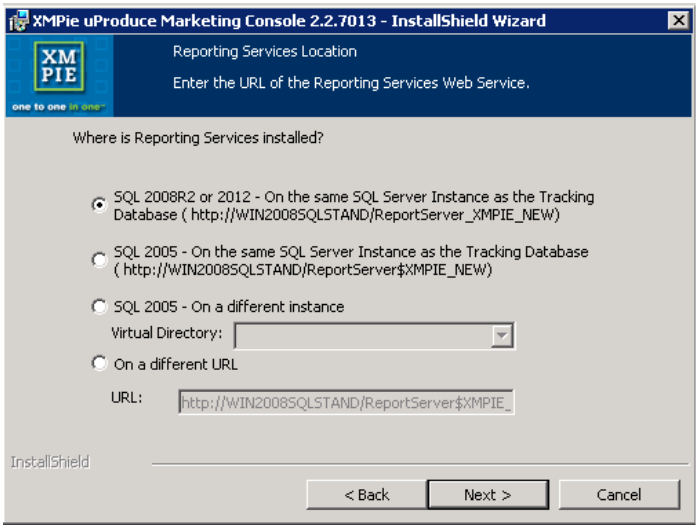
Figure 16: Installer— New User Window



10. In the **Reporting Services Location** page (Figure 17), choose one of the following and click **Next**:

    - Choose the first radio button for SQL Server 2008 R2 or SQL 2012 or the second one for SQL Server 2005.
    - If you are using Reporting Services on SQL Server 2005 and the Reporting Services instance name is not the default *XMPIE*, you can select the **SQL 2005 - On a different instance** radio button and select the appropriate virtual folder name from the drop-down list.
    - If the Reporting Services Web Service resides on a *different* SQL Server instance or in a different virtual folder than the Tracking Database or on a different machine, choose the **On a different URL** radio button, and specify the path according to the example below:

    Figure 17: Installer—Reporting Services Location on the same machine



11. In the **uProduce main database Configuration** page (Figure 18), choose one of the following and click **Next**:

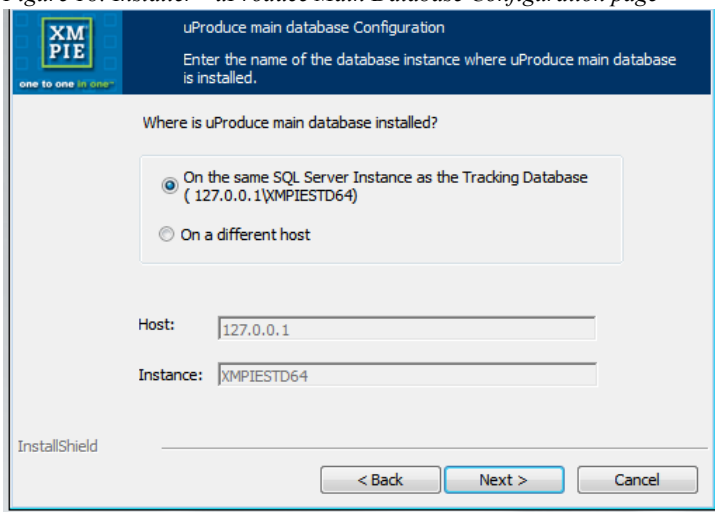
    - If the uProduce Main Database resides on the *same* SQL Server or instance as the Tracking Database, choose the first radio button.

      The uProduce Main Database details are automatically completed (as shown here).

    - If the uProduce Main Database resides on a *different* SQL Server or instance than the Tracking Database, choose the second radio button, and specify the following uProduce Main Database details:

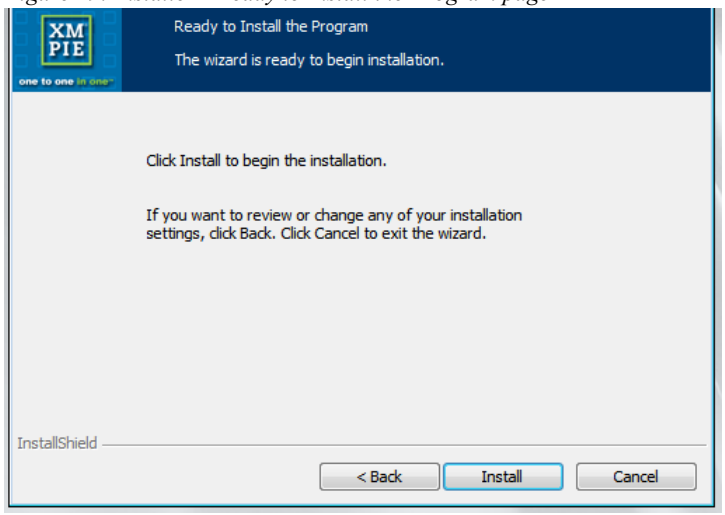
      - The name or IP address of the **Host** machine
      - The name of this SQL Server **Instance**
      - The **User Name** and **Password** for logging into this uProduce Main Database instance

Figure 18: Installer—uProduce Main Database Configuration page



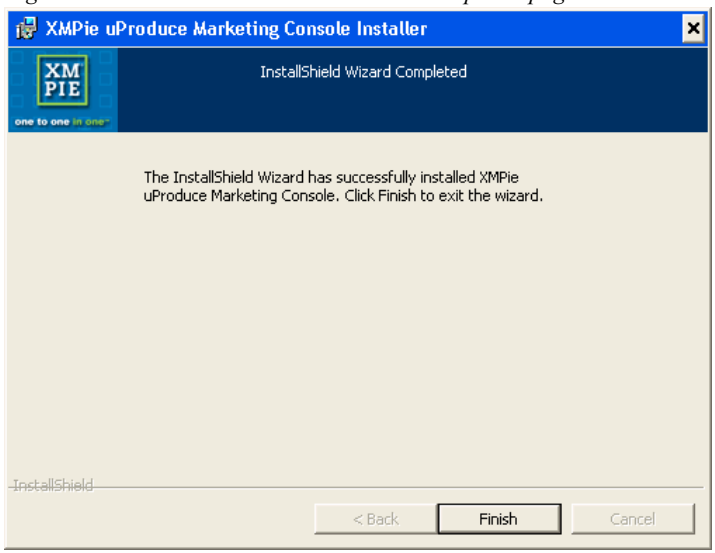
12. In the **Ready to Install the Program** page (Figure 19), run the installation by clicking **Install**.

Figure 19: Installer—Ready to Install the Program page



13. In the **InstallShield Wizard Completed** page (Figure 20), exit the installer by clicking **Finish**.

Figure 20: Installer—InstallShield Wizard Completed page



Marketing Console Windows Service Configuration

As part of the installation of the Marketing Console SQL Server components, Marketing Console Windows Service *XMPMCServer* is installed.

The Marketing Console Windows Service performs the following tasks:

- Nightly caching of Marketing Console reports
- SQL table reindexing
- Updating uProduce Data Sources after Write Back has been performed in the Marketing Console
- Synchronizing between the Tracking and the Analytical databases

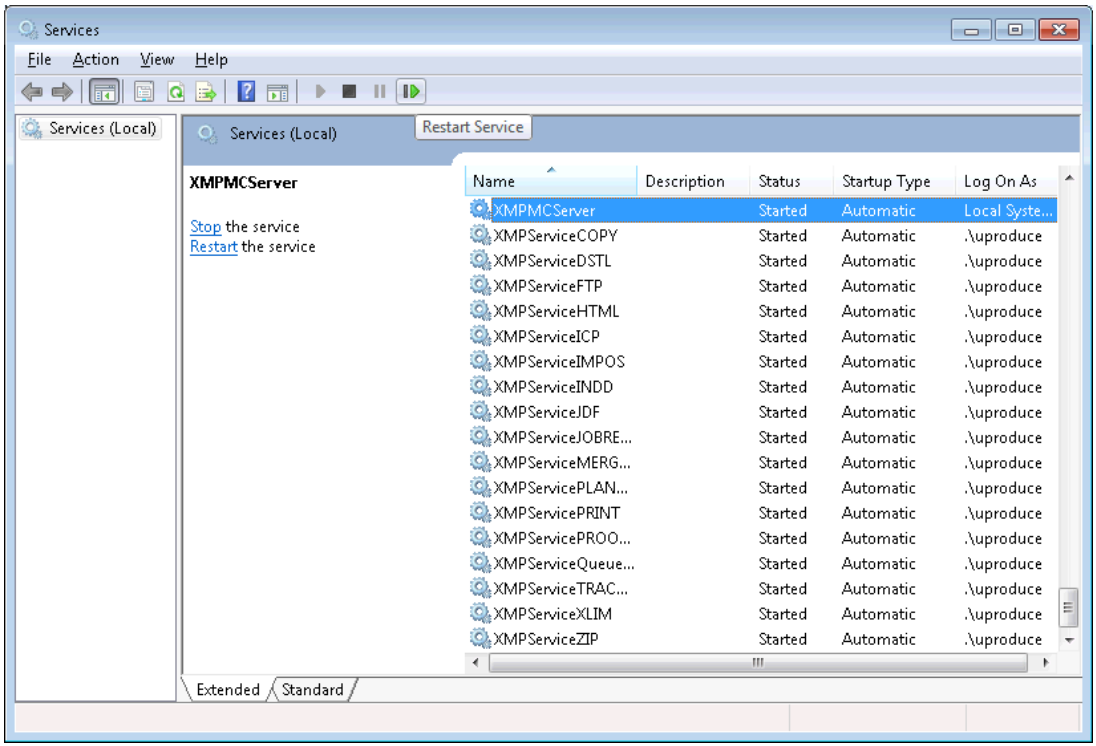
The Marketing Console Windows Service (on the Marketing Console SQL Component) listens to the TCP-12881 port. If this port is already used by another application, it is possible to configure it by updating the *XMPMCServer.exe.config* file by modifying the value in the `XMPMCServer.Main.Properties.Settings` node of the file:

```
<configuration>
  <applicationSettings>
    <XMPMCServer.Main.Properties.Settings>
      <setting name="WRITEBACK_TCP_PORT"
serializeAs="String">
        <value>12881</value>
```

This file is located at *Program Files/XMPie/XMPMCServer.*

After modifying the port you have to restart the *XMPMCServer* Windows Service from the Windows Services Console.

Figure 21: Restarting the XMPMCServer Service



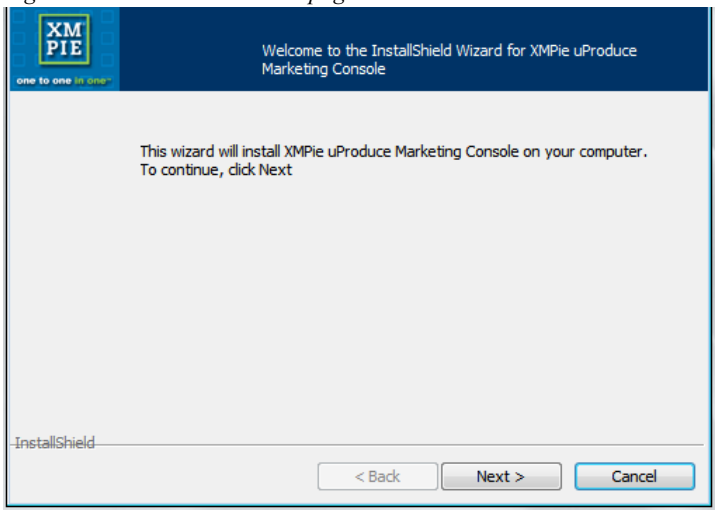
Now that the Marketing Console SQL Server Components have been successfully installed and configured, the *XMPMCServer Windows* Service performs the initial synchronization between the Tracking and the Analytical databases. Depending on the size of the Tracking database, this process can take up to a few hours. While the synchronization is running, you can still continue with the installation of Web Services (see Web Services Installation – LAN Web Server Machine on page 27) and Web Site (see Web Site Installation – DMZ Web Server Machine on page 36).

Web Services Installation – LAN Web Server Machine

1. Double-click the Marketing Console installation file (**XMPie Marketing Console Vx.x Build xxxx.exe**).

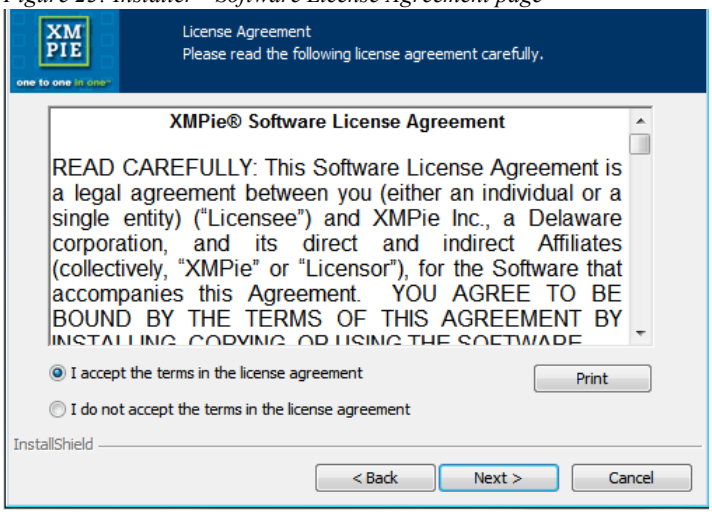
2. In the **Welcome** page (Figure 22), click **Next**.

Figure 22: Installer—Welcome page



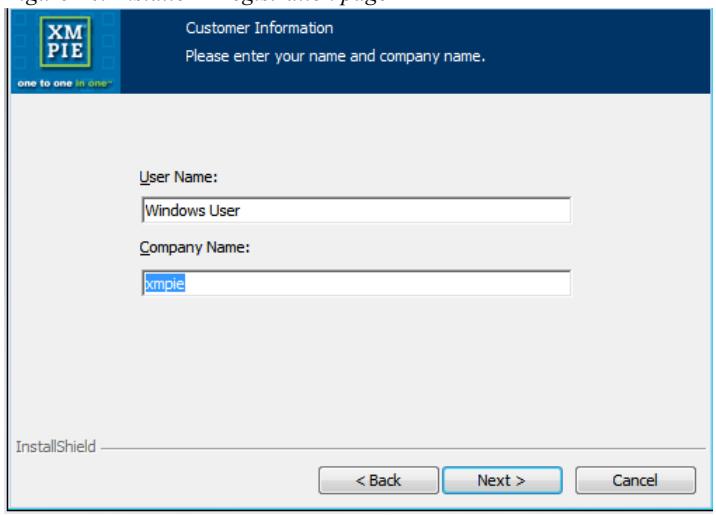
3. In the **License Agreement** page (Figure 23), accept the license agreement by choosing the top radio button (as shown below), and click **Next**.

Figure 23: Installer—Software License Agreement page



4. In the **Customer Information** page (Figure 24), enter the **User Name** and the **Company Name** of the customer who owns this Marketing Console, and click **Next**.

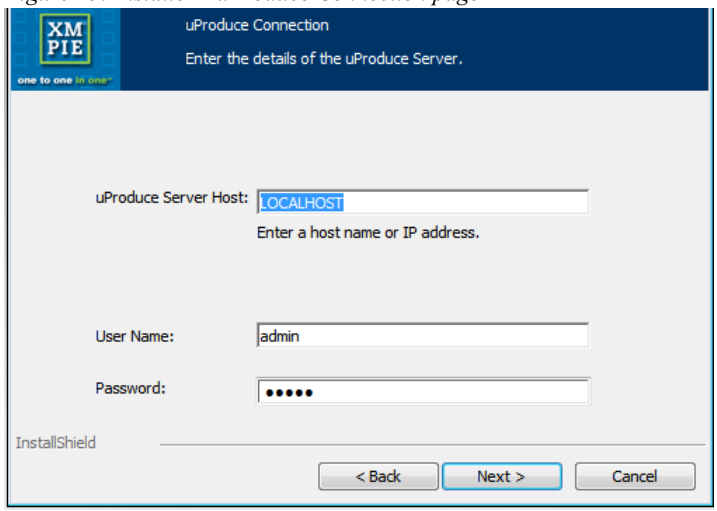
Figure 24: Installer—Registration page



5. In the **uProduce Connection** page (Figure 25), specify the following uProduce connection details, and then click **Next:**

   - The host name or an IP address of the **uProduce Server Host** machine
   - The **User Name** and **Password** for logging into the uProduce Server.
     These credentials may belong to the administrator or to any other uProduce user.

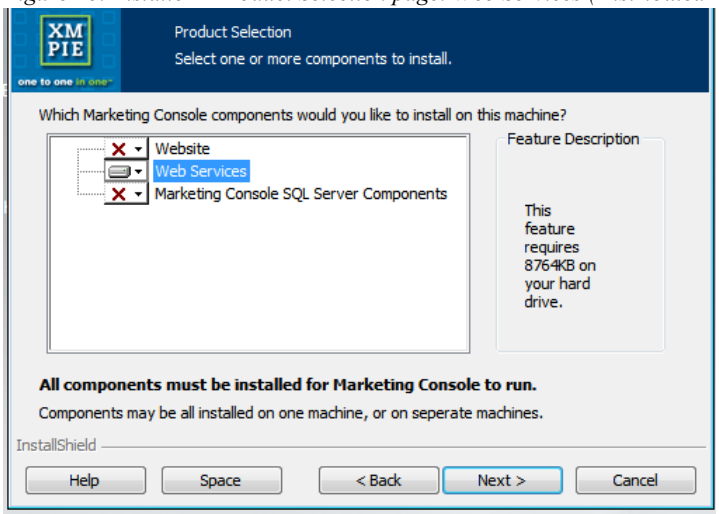
Figure 25: Installer—uProduce Connection page



6. In the **Product Selection** page (Figure 26), select the product(s) you wish to install:

   By default, all three features are set to be installed.
   To exclude the **Website** and the **Marketing Console SQL Server Components** from this installation, set their drop-down lists to: **This feature will not be available**, and click **Next**.

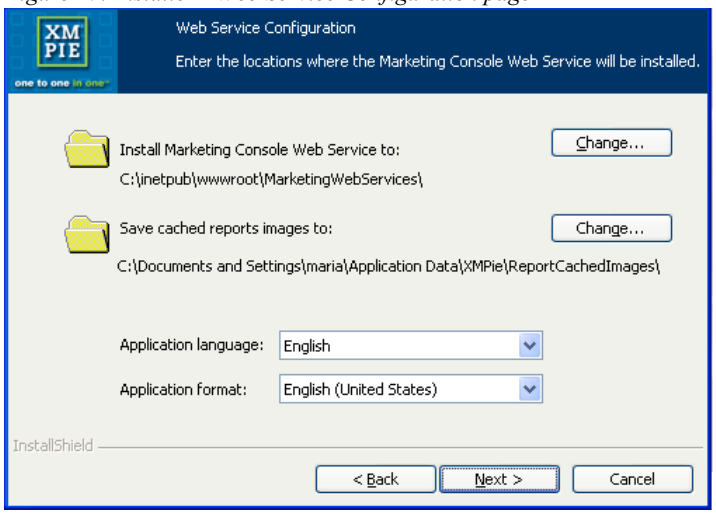
Figure 26: Installer—Product Selection page: Web Services (Distributed Installation)



7. In the **Web Service Configuration** page (Figure 27), set up the following parameters:

   - Select the locations of the Marketing Console Web Services and cached report images: The Web Service is installed in the following default directory: **c:\inetpub\wwwroot\MarketingWebServices,** and Cached Reports folder is installed in: **c:\Program Files\XMPie\CachedImages**. To set a different location, click **Change...**, and browse to the desired directory.
   - Select the application language and format:
     - In the **Application language** drop-down list, select the default language of the application from the list of the XMPie-provided languages. This language can be later modified in the **Administration >Application Settings** (see Application Settings on page 51).
     - In the **Application format** drop-down list, select the format that will be applied to dates, time, currency and numbers throughout the application.

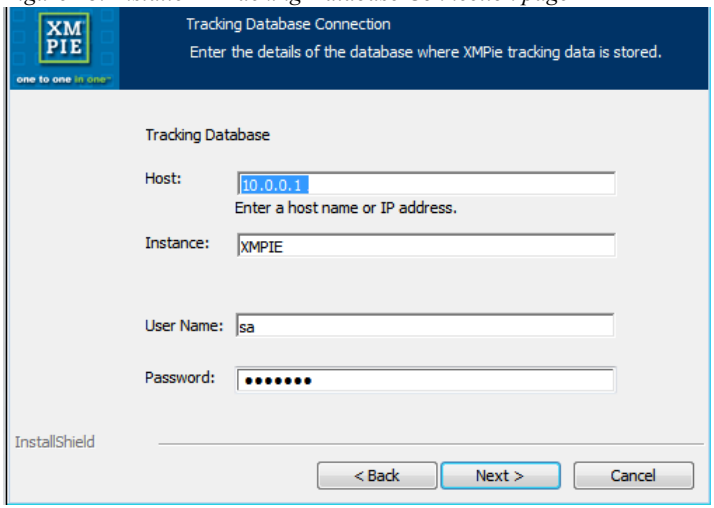
Figure 27: Installer—Web Service Configuration page



Click **Next**.

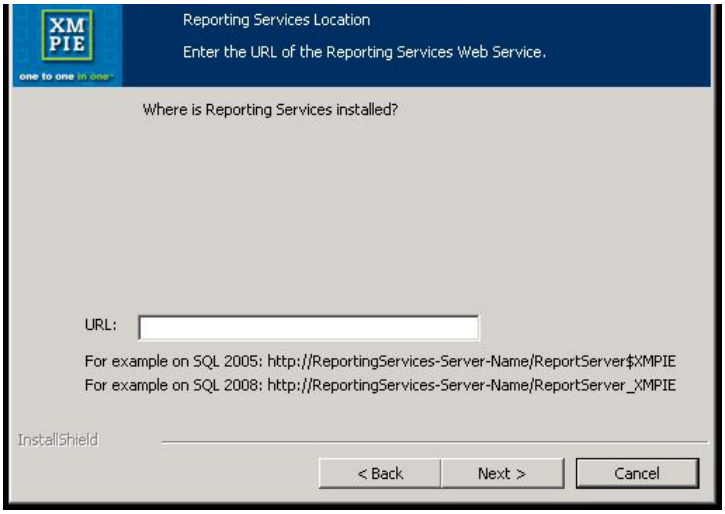
8. In the **Tracking Database Connection** page (Figure 28), specify the following details of the SQL Server that stores XMPie Tracking Database (`XMPDBTracking`), and then click **Next**:
   - The name or IP address of the **Host** machine. When installing the Web Site component on a DMZ Web Server, type the IP address of the Host machine instead of the Host name.
   - The name of this SQL Server **Instance**
   - The **User Name** and **Password** for logging into this SQL Server instance.

Figure 28: Installer—Tracking Database Connection page



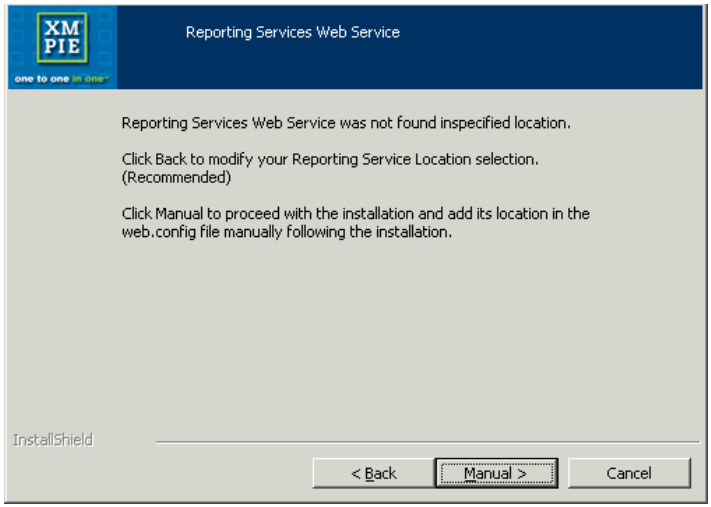
9. In the **Reporting Services Location** page (Figure 29), specify the path to the Web Service URL of the Reporting Services.

Figure 29: Installer—Reporting Services Location on a remote machine



10. If after clicking **Next** the Reporting Server cannot be accessed or found, you are prompted either to go back and modify the **Reporting Service Location** page, or to click **Manual** to proceed with the installation and add its location in the **web.config** manually following the installation.

Figure 30: Installer—Reporting Services Web Service Not Found



11. In the **uProduce main database Configuration** page (Figure 31), choose one of the following and click **Next**:

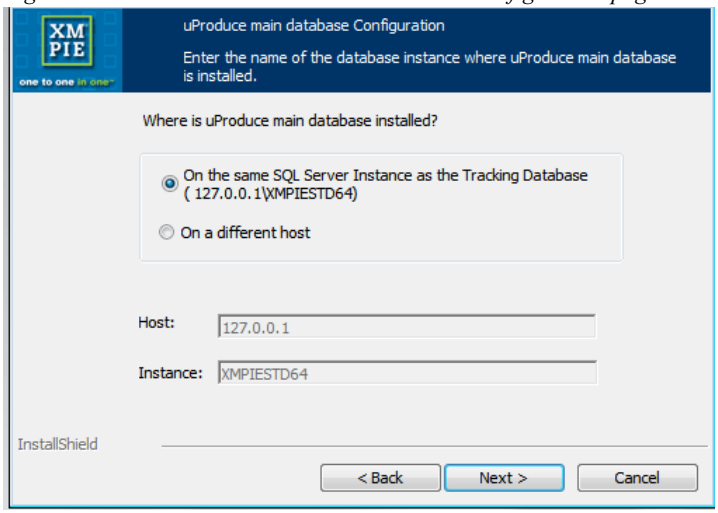
- If the uProduce Main Database (XMPDB2) resides on the *same* SQL Server or instance as the Tracking Database, choose the first radio button.

  The uProduce Main Database details are automatically completed (as shown here).

- If the uProduce Main Database resides on a *different* SQL Server or instance than the Tracking Database, choose the second radio button, and specify the following uProduce Main Database details:

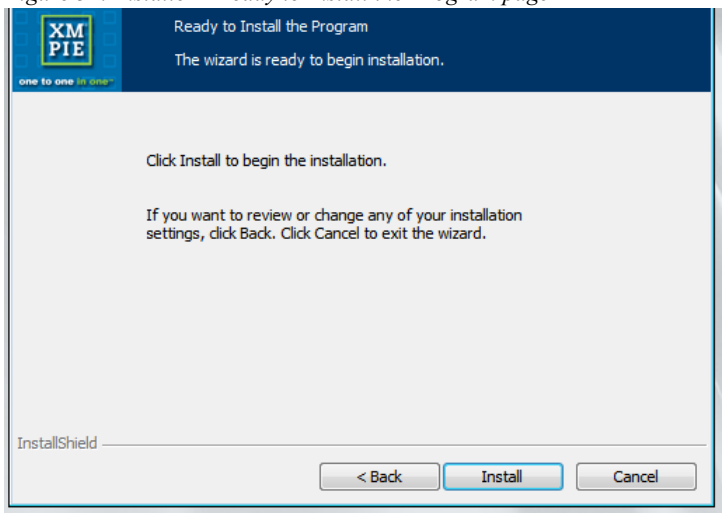
  - The name or IP address of the **Host** machine
  - The name of this SQL Server **Instance**

Figure 31: Installer—uProduce Main Database Configuration page



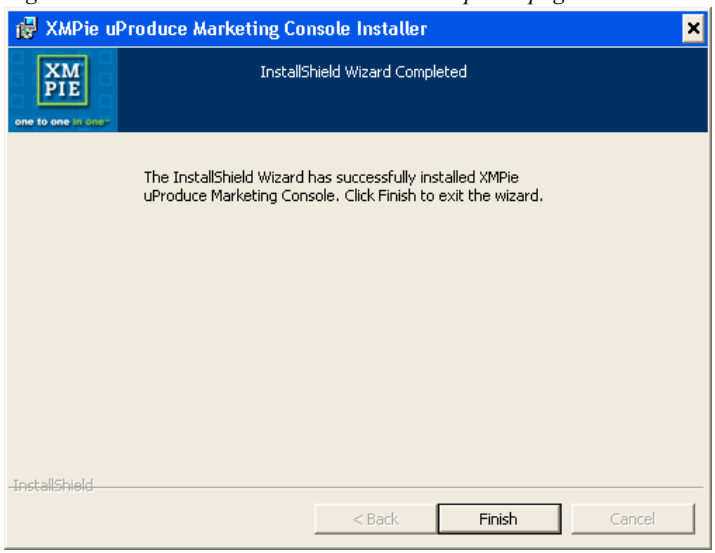
12. In the **Ready to Install the Program** page (Figure 32), run the installation by clicking **Install**.

Figure 32: Installer—Ready to Install the Program page



13. In the **InstallShield Wizard Completed** page (Figure 33), exit the installer by clicking **Finish**.

Figure 33: Installer—InstallShield Wizard Completed page



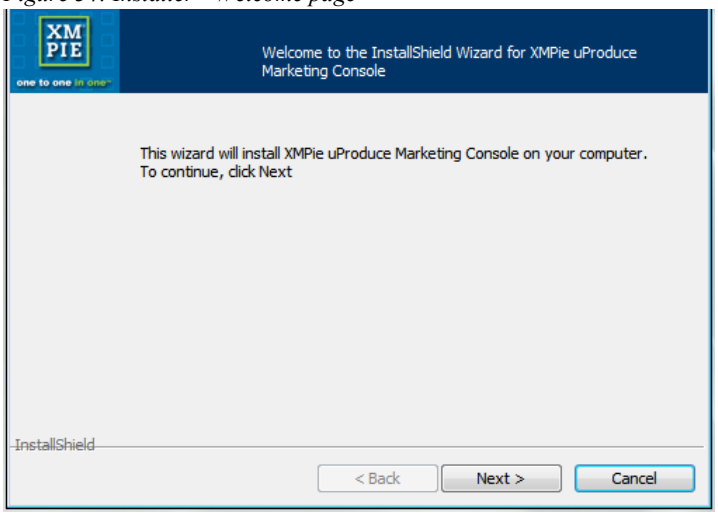
This completes the distributed installation of the Web Services component.

Web Site Installation – DMZ Web Server Machine

Note: *Installation of Web Site components requires AJAX Toolkit 1.0 to be installed. Please verify that this Toolkit is installed and if not, perform the installation. The installer is located at: http://www.microsoft.com/downloads/en/details.aspx?FamilyID=ca9d90fa-e8c9-42e3-aa19-08e2c027f5d6&displaylang=en*

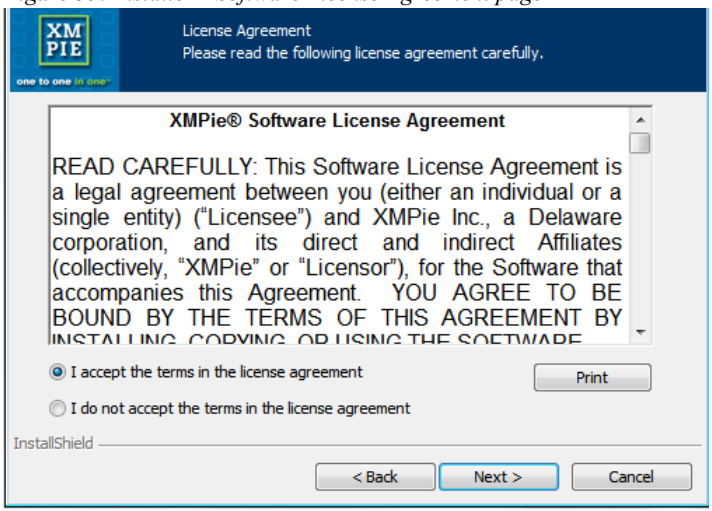
1. Double-click the Marketing Console installation file to run the installer (**XMPie Marketing Console Vx.x Build xxxx.exe**).
2. In the **Welcome** page (Figure 22), click **Next**.

Figure 34: Installer—Welcome page



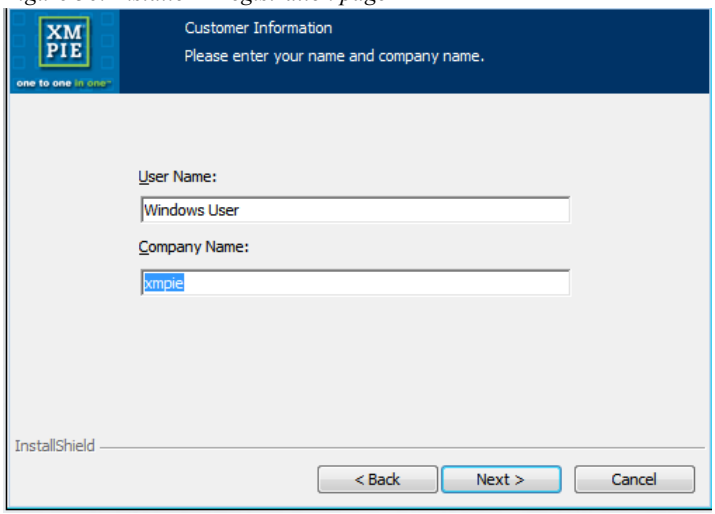
3. In the **License Agreement** page (Figure 23), accept the license agreement by choosing the top radio button (as shown below), and click **Next**.

Figure 35: Installer—Software License Agreement page



4. In the **Customer Information** page (Figure 24), enter the **User Name** and the **Company Name** of the customer who owns this Marketing Console, and click **Next**.

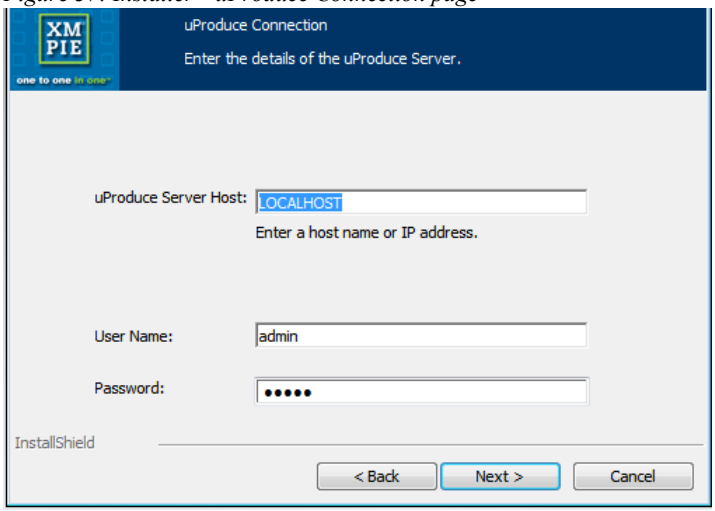
Figure 36: Installer—Registration page



5. In the **uProduce Connection** page (Figure 25), specify the following uProduce connection details, and then click **Next:**

   - The host name or an IP address of the **uProduce Server Host** machine
   - The **User Name** and **Password** for logging into the uProduce Server.
     These credentials may belong to the administrator or to any other uProduce user.

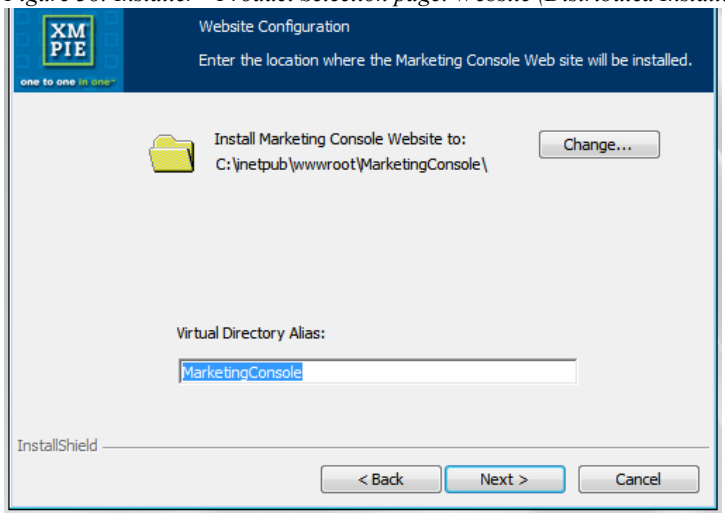
Figure 37: Installer—uProduce Connection page



6. In the **Product Selection** page (Figure 26), select the product(s) you wish to install:

   By default, all three features are set to be installed.
   To exclude the **Web Services** and the **MC SQL Server Components** from this installation, set their drop-down lists to: **This feature will not be available**, and click **Next**.

Figure 38: Installer—Product Selection page: Website (Distributed Installation)

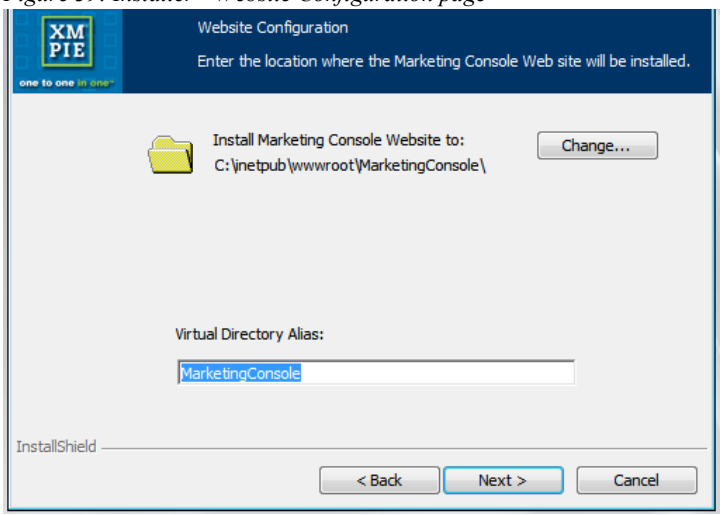


7. In the **Website Configuration** page (Figure 39), the Website is created in the following default directory: **c:\inetpub\wwwroot\MarketingConsole**

   Choose one of the following:

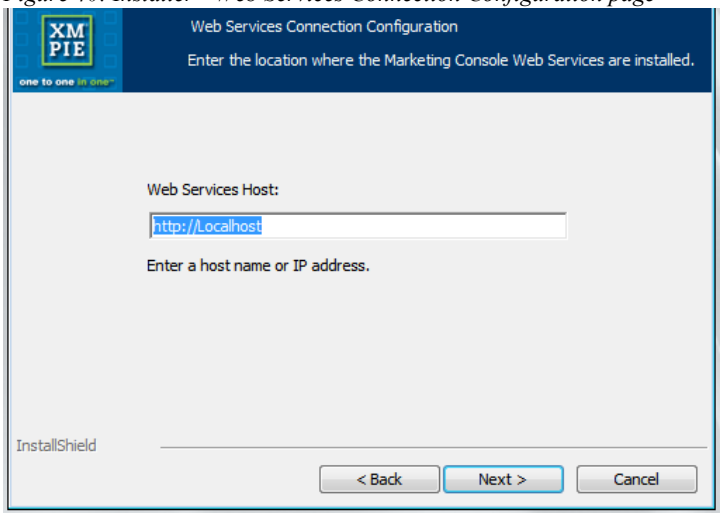
   - To approve this default location and directory name, click **Next**.
   - To specify your own location, take the following actions and then click **Next**:
     - Set a different Website location, by clicking **Change...**, browsing to the desired directory and selecting it.
     - Set a different directory name, by entering it in the **Virtual Directory Alias** field.

Figure 39: Installer—Website Configuration page



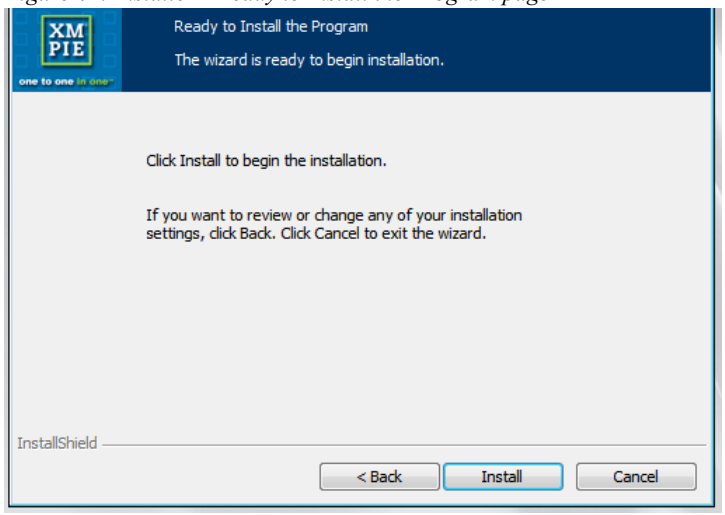
8. In the **Web Services Connection Configuration**, specify the Web Services location in the **Web Services Host** field.

Figure 40: Installer—Web Services Connection Configuration page



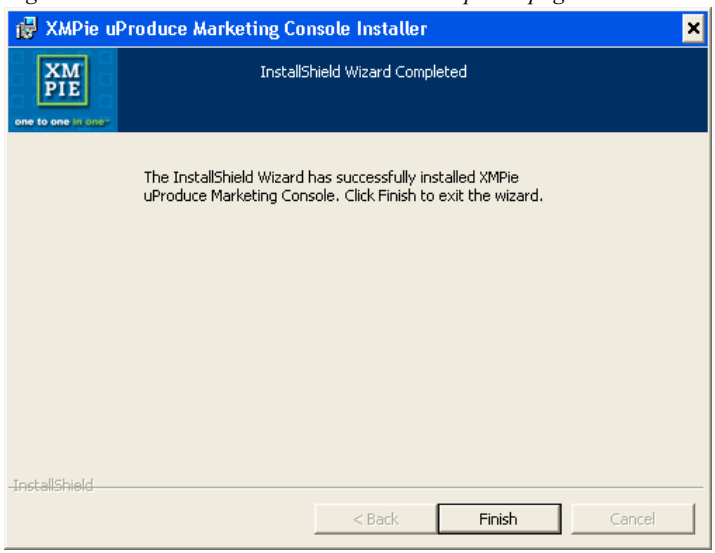
9. In the **Ready to Install the Program** page (Figure 32), run the installation by clicking **Install**.

Figure 41: Installer—Ready to Install the Program page



10. In the **InstallShield Wizard Completed** page (Figure 33), exit the installer by clicking **Finish**.

Figure 42: Installer—InstallShield Wizard Completed page



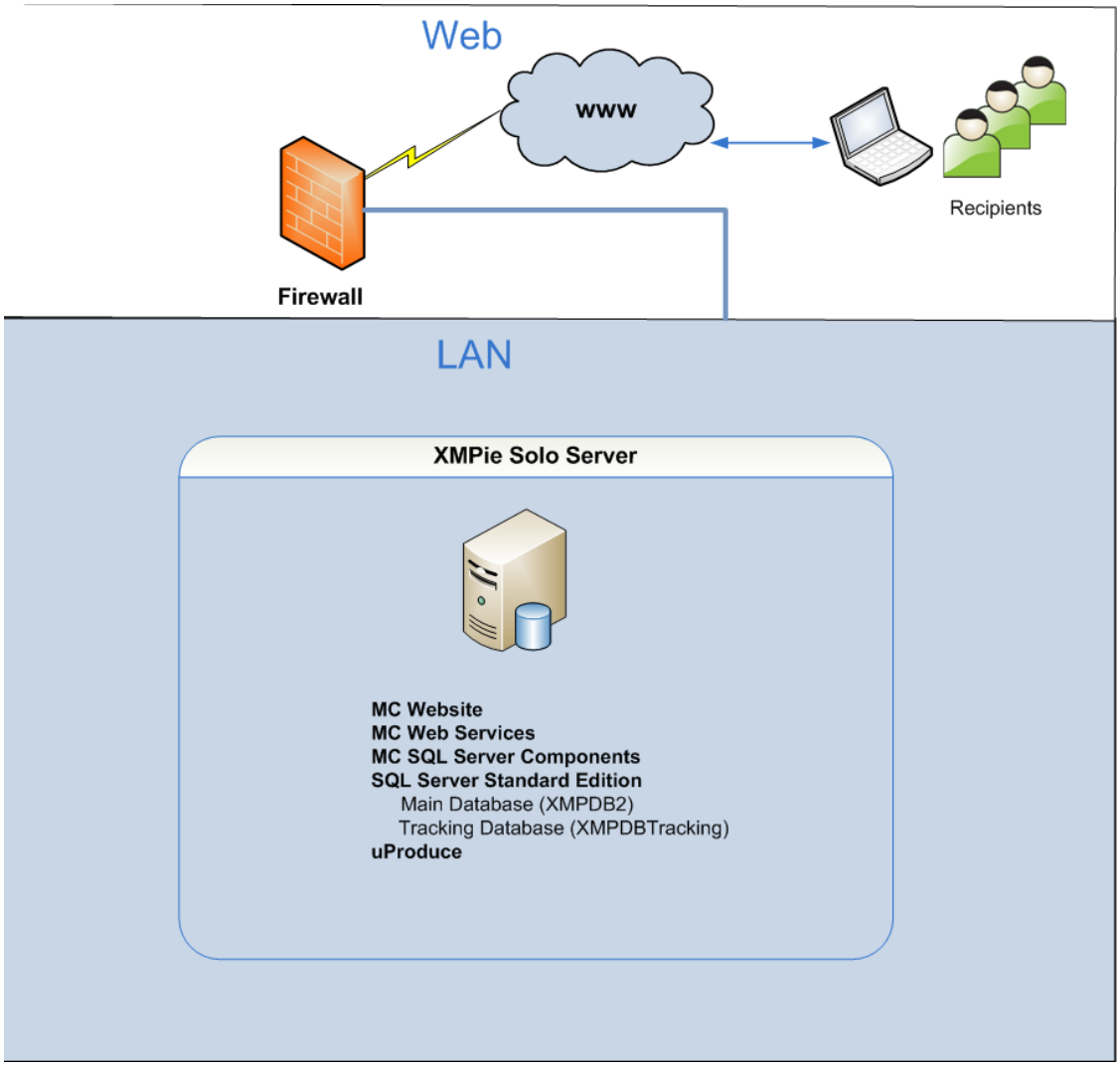
This completes the distributed installation of all Marketing Console components: Website, Web Services and Marketing Console SQL Server Components. To run the Marketing Console, open your Web browser and go to the following URL:
http://*[Web Server Name]*/MarketingConsole

Note: *Make sure you replace "[Web Server Name]" with the name of your Web Server (for example:"localhost"), on which you have installed the Website.*

Standalone Installation

You may choose to install all Marketing Console components (Website, Web Services and SQL Server Components) on the same machine (Figure 43).

Figure 43: Standalone Installation—XMPie Solo Server

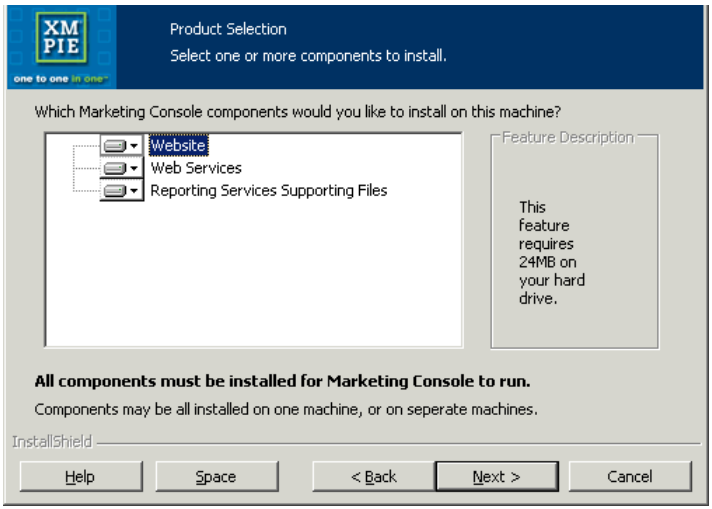


This configuration requires an XMPie Solo Server, which has uProduce installed, along with an SQL Server that is compatible with your Marketing Console Edition: SQL Server Express

Edition with Advanced Services (or higher) for Marketing Console Express Edition, or SQL Server Standard Edition (or higher) for Marketing Console Premier Edition.

To perform a standalone installation, follow the same procedure described above (see SQL Server Components Installation and Configuration on page 17, Web Services Installation – LAN Web Server Machine on page 27 and Web Site Installation – DMZ Web Server Machine on page 36), but this time install all three features right from the start (Figure 44).

Figure 44: Installer—Product Selection page (Standalone Installation)



Complete the installation procedure as explained in the previous section.
When you are done, run the Marketing Console by opening your Web browser and going to the following URL: http://*[Web Server Name]*/MarketingConsole

Note: *Make sure you replace "[Web Server Name]" with the name of your Web Server (for example:"localhost"), on which you have installed the Website and Web Services components.*

Clustering Database Installation

The Marketing Console can be installed in a SQL Server clustered environment. The SQL Server can be a member of the cluster, or it can be a dedicated server outside the cluster. The server will be used for the *Marketing Console SQL Server Components*. On this server you will need to install the **MC SQL Server Components** of the *Marketing Console Installer* (the 3rd component shown in Figure 44). However the *Tracking Database* (**XMPDBTRACKING**) as well as the *uProduce* main database (**XMPDB2**) will reside on the cluster for load balancing and resilience.

Uninstalling Marketing Console

1. Go to **Start>Settings>Control Panel > Add or Remove Programs**.
2. Select **XMPie Marketing Console** and click **Uninstall**.

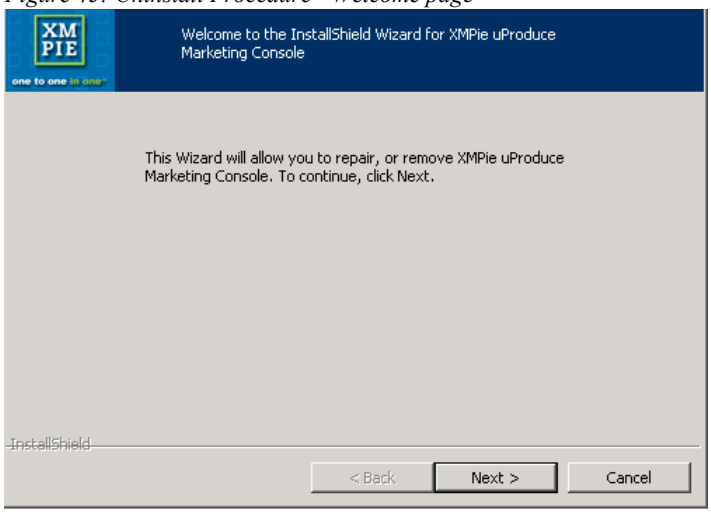
OR

1. Double-click the Marketing Console installation file (**XMPie Marketing Console V2.x Build xxxx.exe)**.

Note: *If you are not running in the administrator mode, right-click the file and choose Run as administrator.*

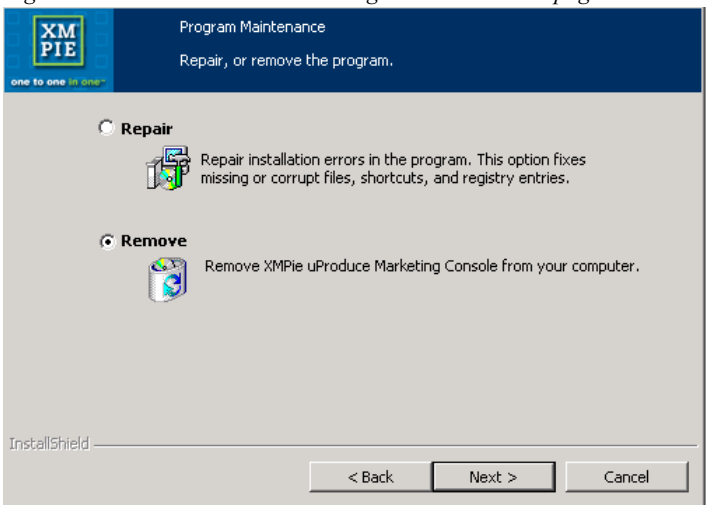
2. In the **Welcome** page, click **Next**.

Figure 45: Uninstall Procedure—Welcome page



3. In the **Program Maintenance** page, select **Remove** and click **Next**.

Figure 46: Uninstall Procedure—Program Maintenance page



Your version will be automatically removed.

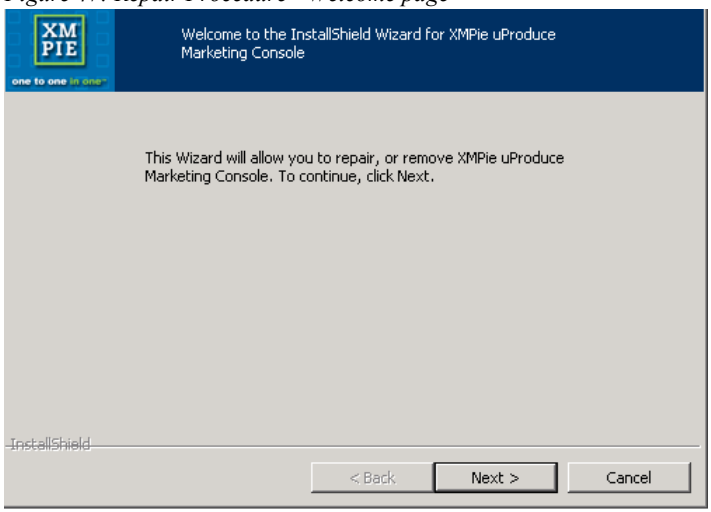
Repairing the Marketing Console Installation

1. Double-click the Marketing Console installation file (**XMPie Marketing Console V2.x Build xxxx.exe)**.

Note: *If you are not running in the administrator mode, right-click the file and choose Run as administrator.*

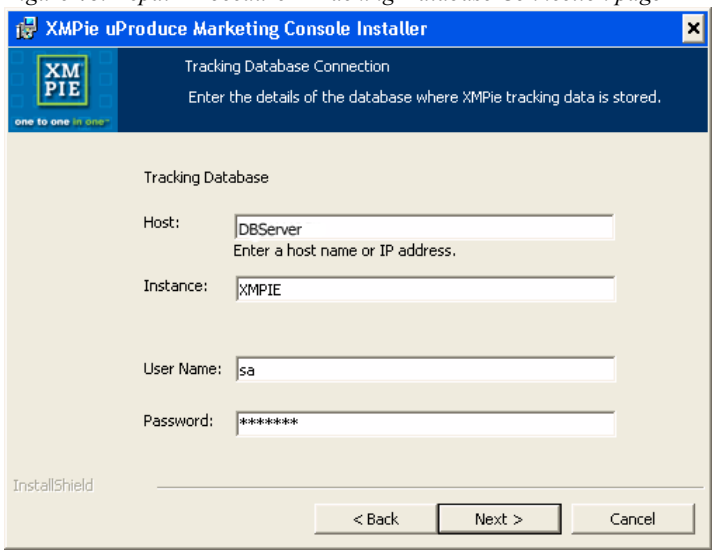
2. In the **Welcome** page, click **Next**.

Figure 47: Repair Procedure—Welcome page



3. If you are repairing an installation including SQL Server Components or Web Services, the **Tracking Database Connection** page is displayed. If the installation does not include the SQL Server Components or Web Services, skip to step 4.

Figure 48: Repair Procedure—Tracking Database Connection page



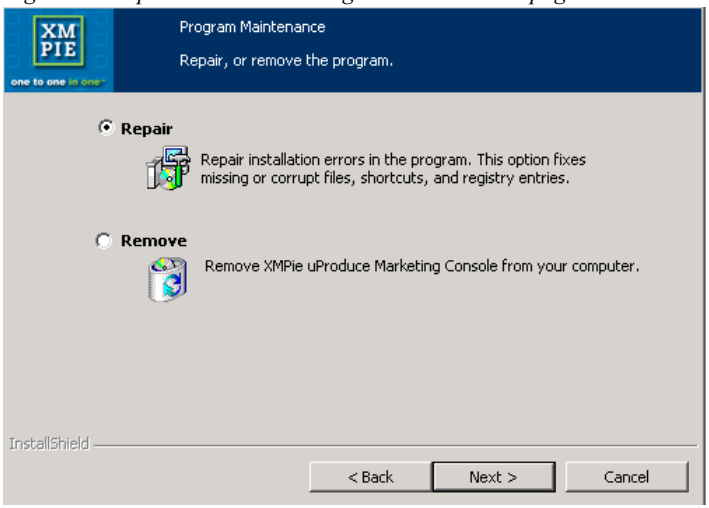
In the **Tracking Database Connection** page, specify the following details of the SQL Server that stores XMPie Tracking Database (`XMPDBTracking`), and then click **Next**:

- The server name or the IP address of the **Host** machine (do not use localhost or 127.0.0.1)
- The name of this SQL Server **Instance**
- The **User Name** and **Password** for logging into this SQL Server instance.

Note: *This password is not saved, and is used only during the installation phase.*

4. In the **Program Maintenance** page, select **Repair** and click **Next**.

Figure 49: Repair Procedure—Program Maintenance page



Your version will be automatically repaired.

Chapter 2: Marketing Console Administration

Marketing Console allows you to manage information on the Campaign Service Levels (Standard or Professional) and the user roles (Analyst or Operator) defined in your system. The Express Edition provides a view of the current configuration, while the Premier and the Signature Editions provide full control over these settings.

Logging-in to the Marketing Console

Marketing Console is a web-based application, accessed over the Internet or your company's intranet.

To log in:

1. Run the Marketing Console, by opening your Web browser and going to the following URL: http://*[Web Server Name]*/MarketingConsole

   Note: *Make sure you replace "[Web Server Name]" with the name of your Web Server (for example:"localhost"), on which you have installed the Website and Web Services components.*

   The **XMPie uProduce Marketing Console Login** page is displayed (Figure 50).

   Figure 50: XMPie uProduce Marketing Console—Login page

2. Enter the administrator's **Username** and **Password**.

   Note: *These are the same user name and password you use to login to uProduce. Marketing Console assumes that the username is "admin". If this name has changed, change it in the Marketing Console's configuration file (web.config) file as well.*

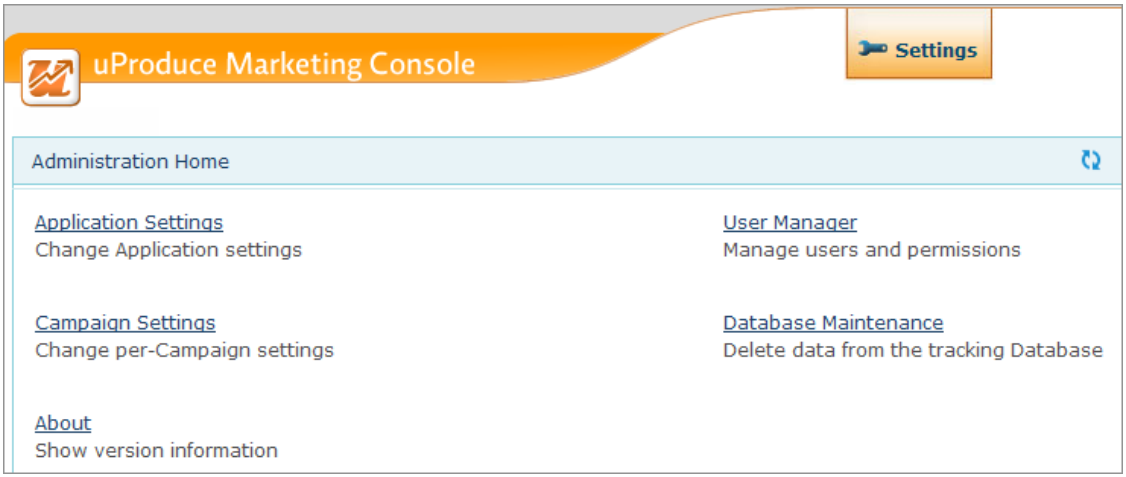
   Your user name is saved and will appear automatically the next time you log in, provided that cookies are enabled.

3. Click the **Login** button. Marketing Console is displayed, showing its **Administration** interface.

Marketing Console Administration Environment

When you login as an administrator, Marketing Console shows a single tab, **Administration** (Figure 51).

Figure 51: Marketing Console—Administration Home Page



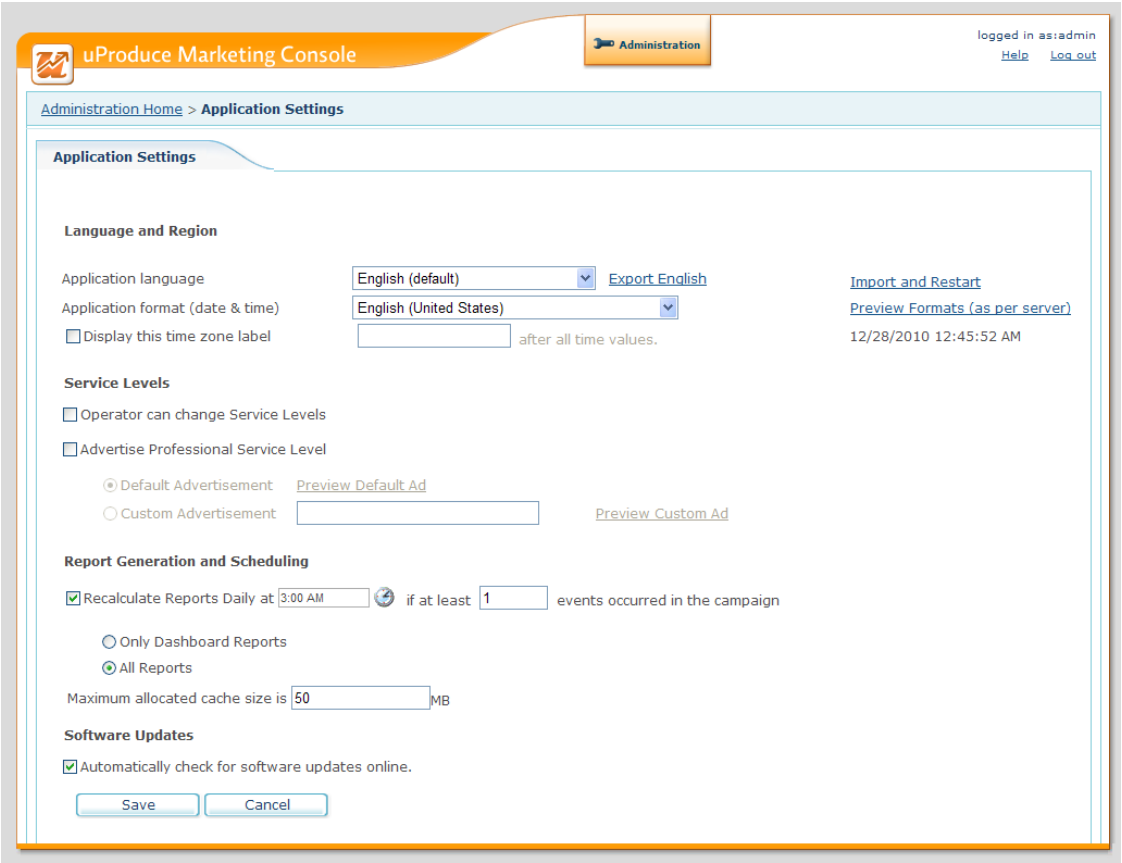
The **Administration** Homepage contains links to the following administration components:

Component	Administrative Task
Application Settings	Modifying the general application settings
Campaign Settings	Modifying the per-Campaign settings
About	Viewing the version information
User Manager	Managing users and permissions
Database Maintenance	Deleting data from the tracking Database

In the top right corner of the Administration environment (on all pages), you may see a Synchronization indicator ( ). This indicator is shown when the Marketing Console Analytical database is being synchronized with the Tracking database. The synchronization status is viewed in the scope of all campaigns for the Administrator or a single campaign for Operator or Analyst. The tooltip describes the synchronization status. You may continue working while synchronization is in progress, however it is recommended to run the reports again once the synchronization completes and the synchronization indicator disappears. The synchronization process will be triggered automatically in several cases, for example, immediately after a large number of print or email events occurred in uProduce.

Application Settings

Figure 52: Marketing Console—Application Settings



The **Application Settings** page allows you to control the following components:

- Language and Region (see Configuring the Language and Region Settings on page 51).
- Service Levels (see Configuring the Service Levels on page 54)
- Report Generation and Scheduling Settings (see Configuring Report Generation and Scheduling on page 56)
- Software Updates (see Configuring Software Updates on page 57)

Configuring the Language and Region Settings

Marketing Console allows the administrator to configure the application language and regional settings.

Configuring the Application Language

Upon the first login, the **Application language** drop-down list displays the language selected during the installation of Web Services (see Web Services Installation – LAN Web Server Machine on page 27). The application language affects all users of the application: Administrators, Operators, and Analysts.

You can modify the application language by selecting one of the available languages in the **Application Language** drop-down list. The list includes out-of-the-box languages provided by XMPie, as well as imported languages, if any.

For information about exporting and importing application languages, see Appendix A: Exporting and Importing Languages on page 83.

Configuring the Application Formats

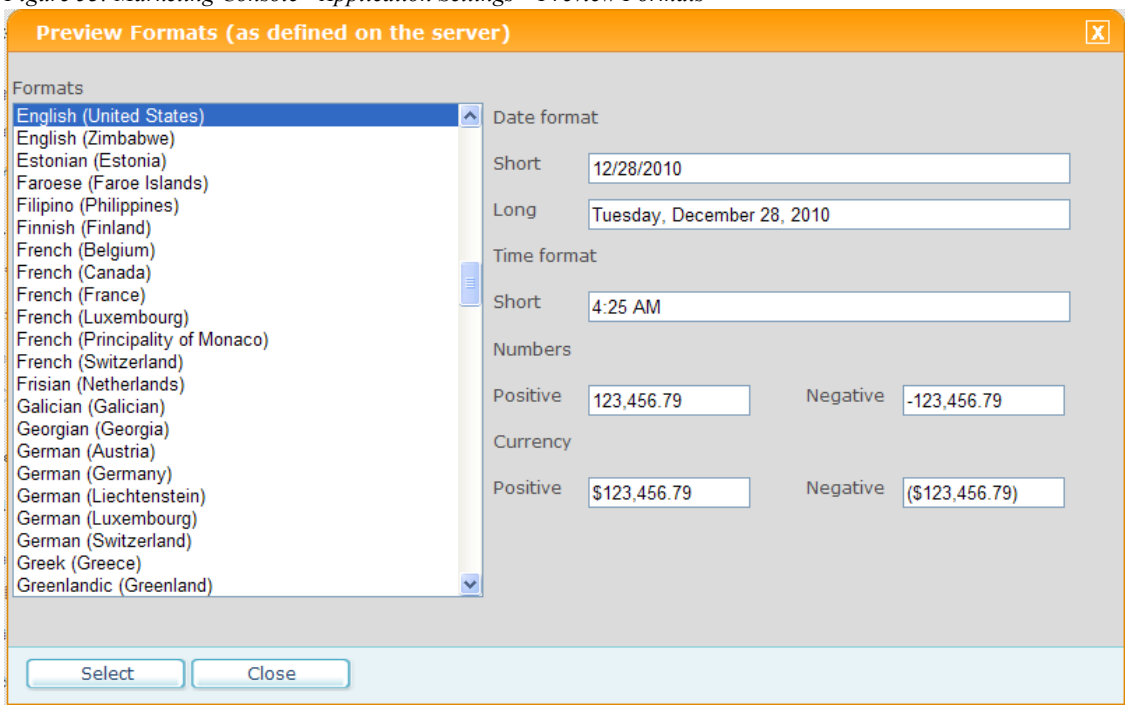
The first time you login into Marketing Console, the **Application format (date and time)** drop-down list displays the format selected during the installation of Web Services (see Web Services Installation – LAN Web Server Machine on page 27).

To modify the application format, select one of the available formats in the **Application format (date and time)** drop-down list.

To preview the application formats:

1. Before selecting the application format, you can preview it by clicking the **Preview Formats** link. The **Preview Formats** window is displayed.

Figure 53: Marketing Console—Application Settings – Preview Formats



The formats are defined on the server and displayed in the dialog for your convenience. Once you select a locale and culture in the **Formats** list, the right pane displays the following formats as they will appear in the application:

- Date format (short and long)
- Time format (short)
- Number format (positive and negative numbers)
- Currency format (positive and negative numbers)

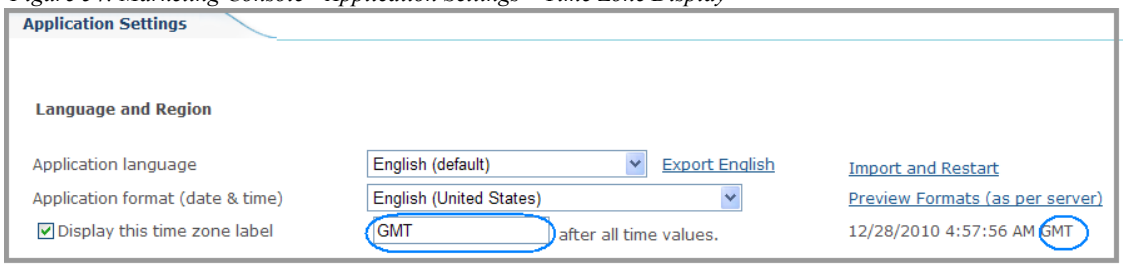
2. Click:

   - **Select** to choose the application format. The selected format will be displayed in the **Application formats** field in the **Application Settings** page (Figure 53).
   - **Close** to quit the **Preview Formats** window without modifying the format selection.

To append the time zone label to the time values:

1. In the **Application Settings** page **>Language and Region** section, check the **Display this time zone label…after all time values** checkbox.
2. In the text box, enter the name of the time zone. The time format preview will be refreshed accordingly.

Figure 54: Marketing Console—Application Settings – Time Zone Display



Configuring the Service Levels

The **Service Levels** section allows you to control the following components:

- Operator permission to change Campaign Service Levels (see Configuring the Campaign's Service Level on page 59).
- Professional Service Level advertisement shown to Standard Service Level users (see Configuring Professional Service Level Advertisement on page 55).

Allowing Operators to Change Service Levels

The Premier and Signature Editions allow you to give Operators permission to toggle the Campaign's Service Level. Switching between the Professional and the Standard Service Levels is useful when the Operators define reports in the Professional Service Level, and need to check how they appear to Analysts using the Standard Service Level.

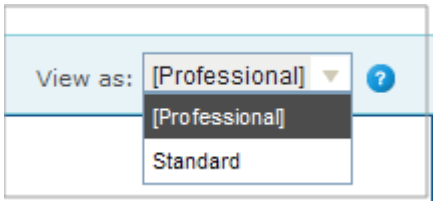
To allow Operators to change Campaign Service Level, proceed as follows:

1. In the **Application Settings** page, check the **Operator can change Service Levels** check box.
2. Approve your changes by clicking **Save**.

   A confirmation message is displayed, stating the values were saved.

As a result, Operators who log into the system are shown a drop-down list, allowing them to switch between the Standard and Professional Service Levels.

Figure 55: Operator Service Level Drop-Down List



Note: *The Service Level defined for the Campaign is marked with square brackets (for example, [Professional]). Non-privileged users can only view the bracketed Service Level.*

Configuring Professional Service Level Advertisement

Premier and Signature Edition owners have the option to advertise the Professional Service Level to their Standard Service Level end-customers in order to generate more revenue by inviting customers to upgrade their subscription. You can control whether the advertisement is displayed when these customers try to access Professional Service Level features; and whether to use the default advertisement or a custom advertisement.

To configure the advertisement, take the following steps:

1. In the **Application Settings** page, make the advertisement available to customers by checking the **Advertise Professional Service Level** check box.

   As a result, Standard Service Level end-customers who click the **Edit** link (in the report title displayed in the **Reports** tab) are shown an advertisement, promoting the benefits of the Professional Service Level.

2. To determine which advertisement is displayed, choose one of following:

   - **Default Advertisement**—a generic advertisement provided with the product (Figure 56).

Figure 56: Default Advertisement

- **Custom Advertisement**—a user-defined advertisement, created by a specific customer. Specify the Internet address of the custom advertisement in the **Ad URL** field.

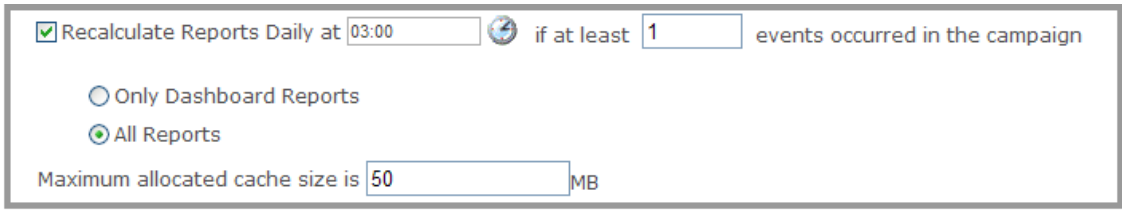
3. For a preview of the selected advertisement, click the **Preview Default Ad** or **Preview Custom Ad** links.

4. Approve your changes by clicking **Save**.

   A confirmation message is displayed, stating the values were saved.

Configuring Report Generation and Scheduling

Figure 57: Application Settings- Reports Recalculation



To define the Reports recalculation time:

1. In the **Application Settings** page, check the **Recalculate Reports Daily at…if at least…events occurred in the campaign** check box.
2. Enter the recalculation time using the Time Picker icon . The time format is based on the user's regional settings. The default time is 3:00 AM.
3. Define the number of new events that will trigger Report Recalculation. New events are events that occurred since the last Report Recalculation time. Please make sure to choose an optimal number that will not overload the SQL server, on the one hand, and will ensure that the Reports are being updated at reasonable intervals, on the other. Setting a too small number (for example, 0), will significantly load the SQL server since the Report Recalculation will be performed at small intervals. On the other hand, if the number of new events is too high, the reports will not be up-to-date for a long period of time. Custom and Dashboard Reports are pre-calculated, so that they can be displayed quicker in the Marketing Console.
4. Choose if you wish to recalculate **Only Dashboard Reports** or **All Reports**.
5. Specify the **Maximum allocated cache size** for Reports Recalculation.
6. Approve your changes by clicking **Save**. A confirmation message is displayed.

Configuring Software Updates

You can configure Marketing Console to automatically check for software updates.

To enable this option, check the **Automatically check for software updates online** checkbox in the **Application Settings** page.

Figure 58: Application Settings- Automatic Updates

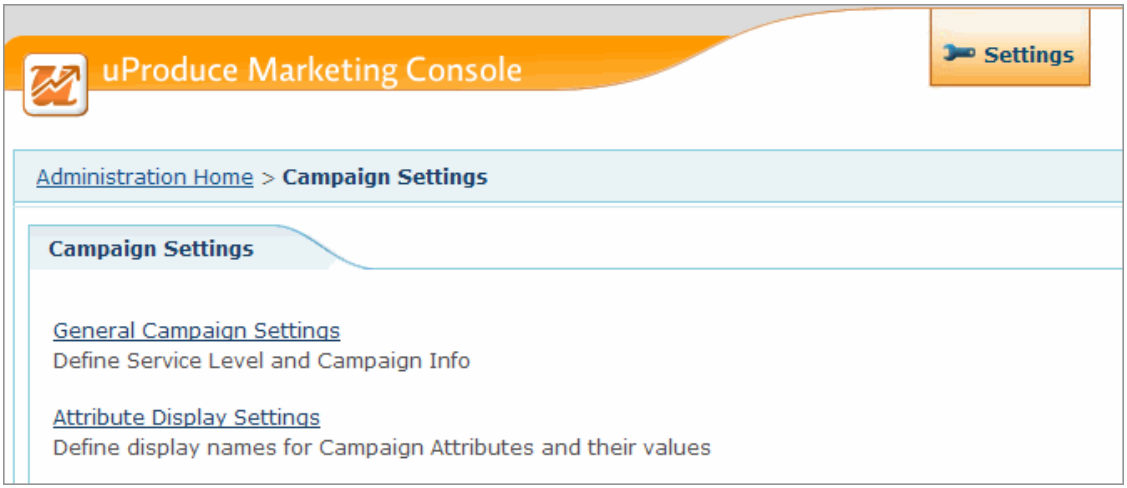
Once this option is checked, the **New Software Updates** section will be displayed in the Report pane of the Marketing Console homepage. Here, users with administrator rights will be able to see the latest software build updates and to install the new report templates.

Campaign Settings

The Premier and Signature Edition set the Professional Service Level as the default configuration of all Campaigns in your system. In certain cases, you may need to override these default settings for specific Campaigns, by setting them to the Standard Service Level. For example, as a Marketing Service Provider, you may wish to give premium-paying customers access to the full featured Marketing Console, while giving other customers access to entry-level features.

To access your Campaign Settings, click the **Campaign Settings** link in the **Administration Home Page**.

Figure 59: Marketing Console—Campaign Settings



The **Campaign Settings** allow you to configure the **General Campaign Settings** (see page 58) and **Attribute Display Settings** (see page 61).

General Campaign Settings

The **General Campaign Settings** page is divided into two sections (see Figure 60):

- **Campaign Selection**

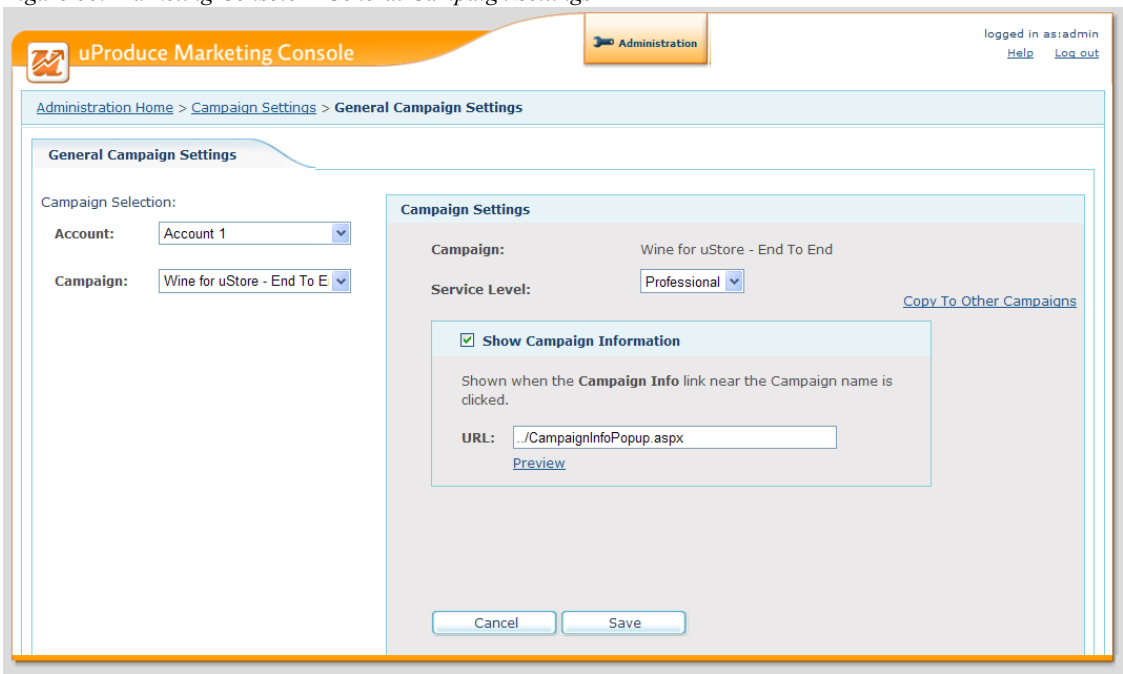
  From the **Account** and **Campaign** drop-down lists, select the Account and Campaign whose settings you would like to view or edit. The **Campaign Settings** defined in the right pane will apply to this selection.

- **Campaign Settings**

  The **Campaign Settings** pane allows you to configure:

- Campaign's **Service Level** (see Configuring the Campaign's Service Level on page 59)
- Campaign's Information (see Applying the Campaign's Service Level to Other Campaigns on page 60)

Figure 60: Marketing Console— General Campaign Settings



Configuring the Campaign's Service Level

Marketing Console is available in three *Editions*: Express, Signature or Premier. These Editions feature the same General reports, and grant service provider Operators full access to the product's analysis capabilities; the main difference is in the Service Level offered to customers:

- *Express* Edition—offers end-customers a *Standard* Service Level, with a view-only permission to run custom reports, defined especially for them by the service provider Operator.
- *Premier* and *Signature* Edition—allows service providers to control the Service Level per-end-customer and per-campaign, by choosing between two Service Levels: *Standard* or *Professional*.
  The Professional Service Level gives end-customers full permissions to view, edit and create visually-rich reports, defined especially for them by the service provider.
  The Premier Edition includes additional enhanced features, such as branding per-account, access to mobile application and API.

To configure a specific Campaign's Service Level, take the following steps:

1. In the **General Campaign Settings** window, go to the **Campaign Selection** pane and select the desired Account and Campaign.
2. In the **Campaign Settings** pane, click the **Edit** link to enter the Edit Mode and set the **Service Level** drop-down list to the desired level: Standard or Professional.
3. Approve your changes by clicking **Save.**

   A confirmation message is displayed, stating the values were saved.

Applying the Campaign's Service Level to Other Campaigns

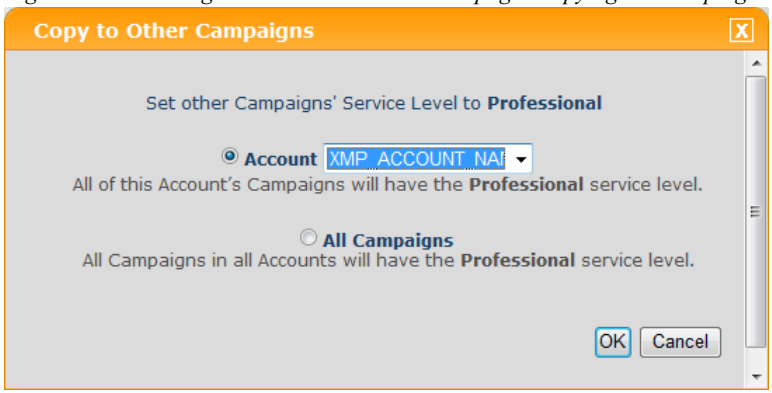
Premier and Signature Edition users can easily and efficiently configure the Service Level of multiple Campaigns, by setting the desired Service Level for a single Campaign, and then copying this setting to all Campaigns in a specific Account, or to all Campaigns in all Accounts defined in the system.

To apply a Campaign's Service Level to other Campaigns, take the following steps:

1. Set the desired Campaign's Service Level as explained above.
2. In the **Campaign Settings** pane, click the **Copy to Other Campaigns** link.

   The **Copy to Other Campaigns** window is displayed (see Figure 61):

Figure 61: Marketing Console— Administration page: Copying the Campaign Configuration



3. Choose one of the following radio buttons, and click **OK** to approve the operation:
   - **Account**—applies the current Campaign's Service Level to all Campaigns in the Account you select from the drop-down list.

- **All Campaigns**—applies the current Campaign's Service Level to all Campaigns in all Account defined in your system.

Configuring Campaign Information

Premier and Signature Edition users can provide their customers with helpful information about the campaign they are analyzing, by creating a web page that can be launched directly from the **Reports** tab. This page can include a diagram showing the campaign flow, as well as references to other web pages and textual descriptions.

To configure the Campaign information, take the following steps:

1. Make sure the Campaign you wish to configure is selected.
2. In the **Campaign Settings** pane, make the Campaign information available to customers by checking the **Show Campaign Information** check box.

   As a result, when customers view this Campaign in the **Reports** tab, a question mark icon and a corresponding link will be displayed, allowing them to launch a Campaign information web page.
3. In the **URL** field, define the Internet address of the Campaign information web page.
4. To view the Campaign information provided to customers, launch the web page by clicking **Preview**.
5. Approve your changes by clicking **Save**.

   A confirmation message is displayed, stating the values were saved.

Attribute Display Settings

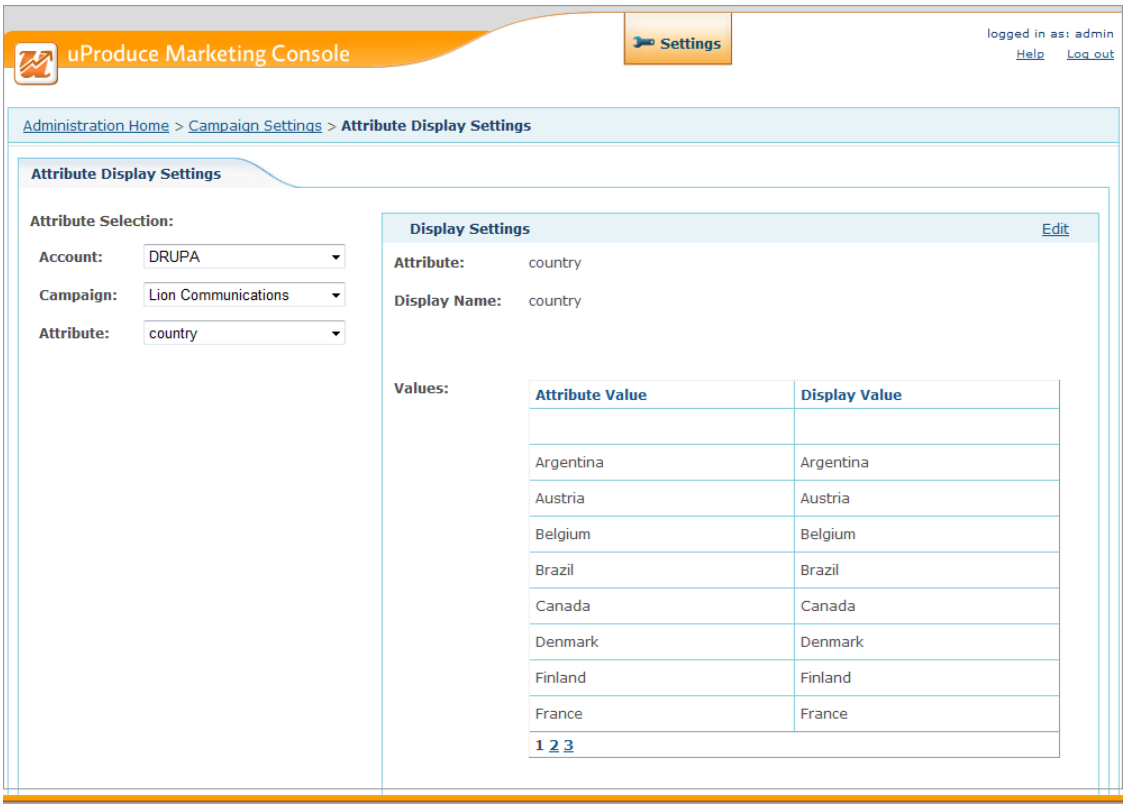
Attribute Display Settings page allows users to define a custom Display Name for all Attributes and their Values. For example, "m" and "f" Attributes can be assigned more friendly Display Names, such as "Male" and "Female" or "Men" and "Women".

Custom names are displayed throughout the customer application instead of the original names.

The **Attribute Display Settings** page is divided into two sections:

- **Attribute Selection**: allows you to select the Account, Campaign and the Attribute to be customized.
- **Display Settings**: shows the Attribute's Display Name and Values.

Figure 62: Marketing Console—Attribute Display Settings



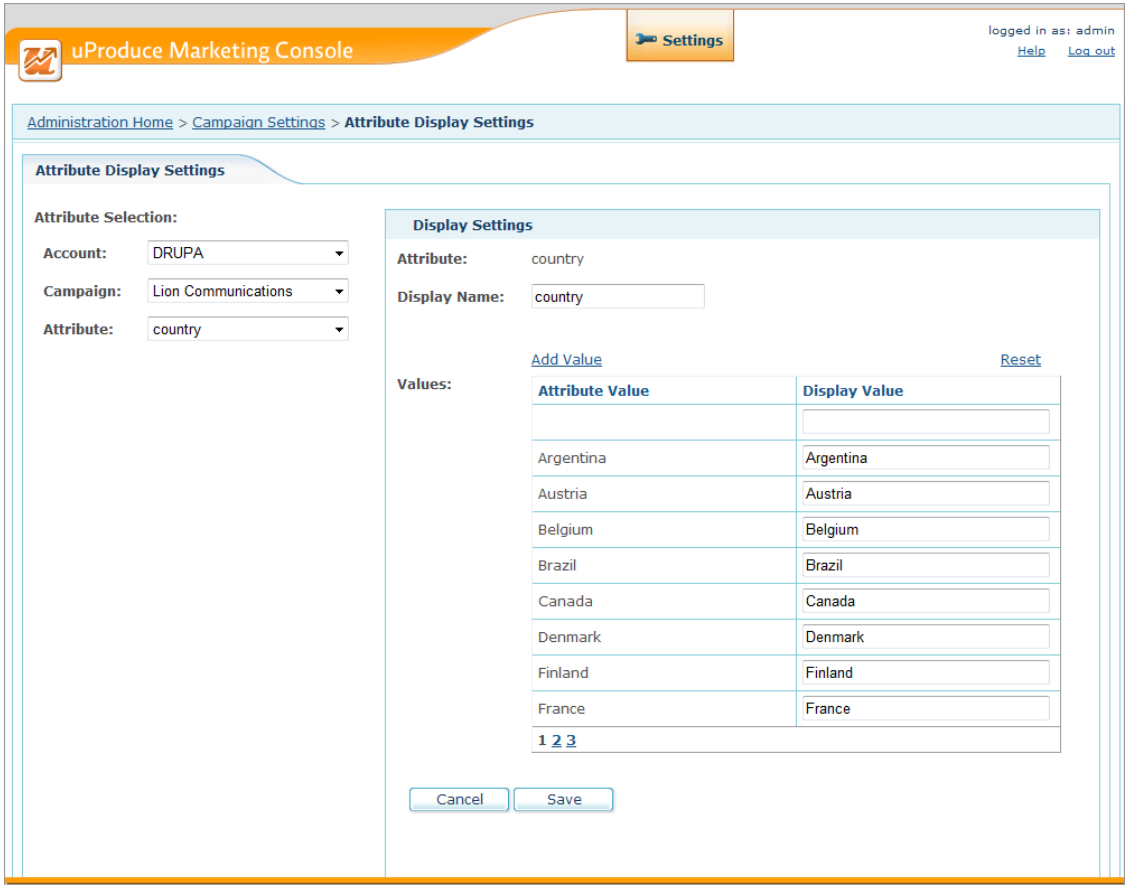
In the Read-Only mode, the **Display Settings** pane (on the right) shows the following information:

Field	Description
Attribute	The name of the Attribute. For ADOR Object Attributes, this is the name as it appears in the uProduce Plan file.
Display Name	The Attribute name as it will appear in the Reports. By default, **Display Name** is identical to **Attribute** name.
Values	Shows a table matching the **Attribute Value** and the **Display Value**. By default, the table is sorted by **Attribute Value.** Clicking the header sorts the table/changes the sort order.

Editing the Attribute Display Settings

To start editing the Attribute Display Settings, click the **Edit** link in the top right corner of the **Display Settings** pane.

Figure 63: Marketing Console—Attribute Display Settings- Edit Mode



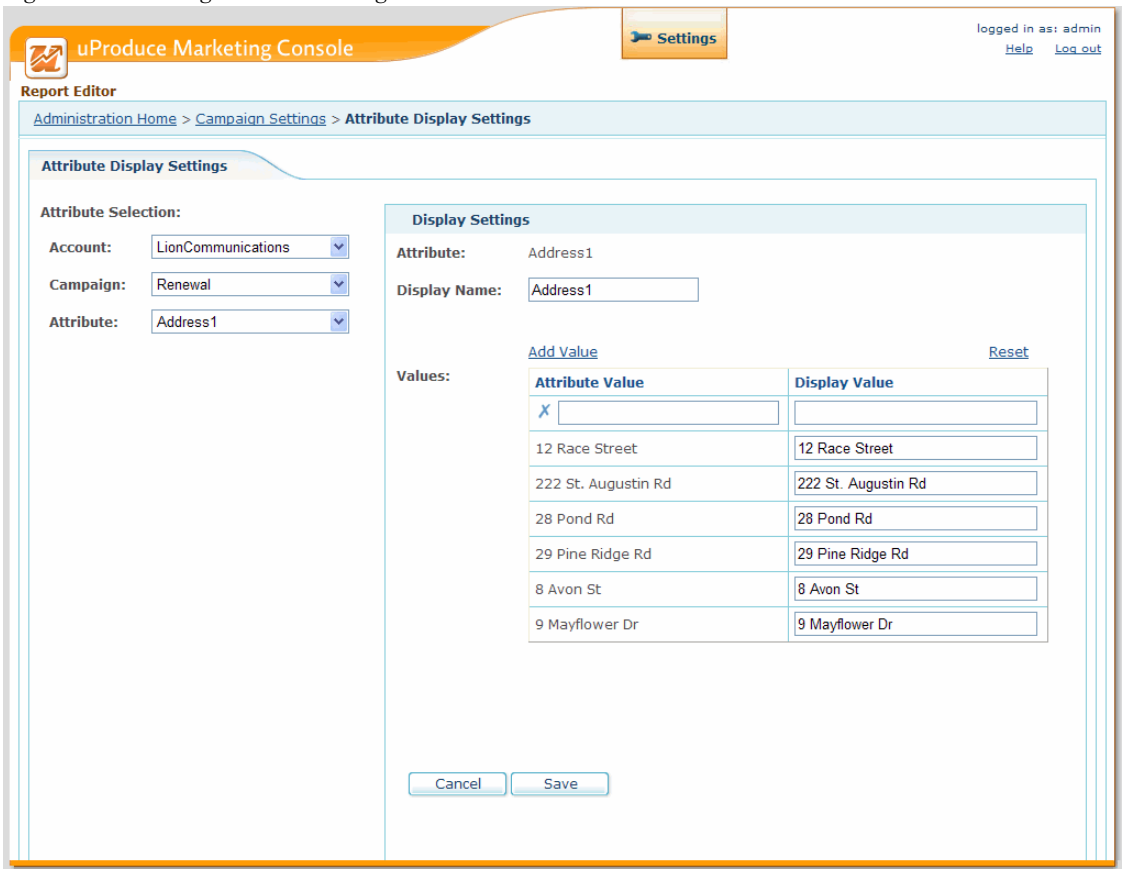
To edit the Attribute Display Settings:

1. Click the **Edit** link in the top right corner of the **Display Settings** pane. The **Attribute Display Settings** page is displayed in the Edit Mode.
2. In the **Display Name** field, enter the customized name of the Attribute as it will appear in the Reports.
3. In the **Values** table, edit the Display Values of the existing Attribute Values. In addition, you have the option to *add* more Attribute Values by clicking the **Add Value** link. This option allows a user to define a Display Value for Attributes that do not exist yet in the Tracking database. For instance, suppose you want "UK" to appear as "United Kingdom",

but this information does not exist in the Campaign. In this case, you can use the **Add Value** option to ensure that "UK" will be displayed as "United Kingdom". When *adding* a new value, a new record is added to the **Values** table in which you can define the **Attribute Value** and assign it a **Display Value**. There is an option to *delete* the added records by clicking the **Delete** icon next to the last added record.

Clicking the **Reset** link restores the default settings in the **Values** table: all Display Values become identical to their matching Attribute Values, and all added lines are removed.

Figure 64: Marketing Console—Adding Attribute Value



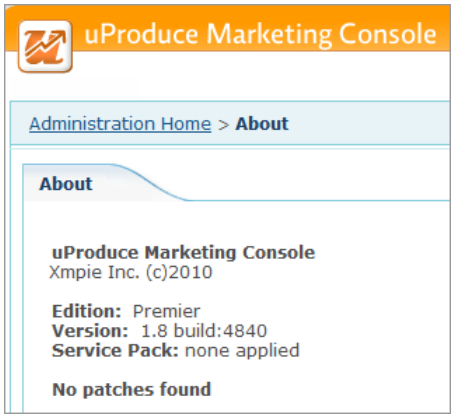
4. Click **Save**.

About

The **About** page shows the following information about the installed version:

- Edition
- Version
- Service Pack
- Patch

Figure 65: Marketing Console—About



User Manager

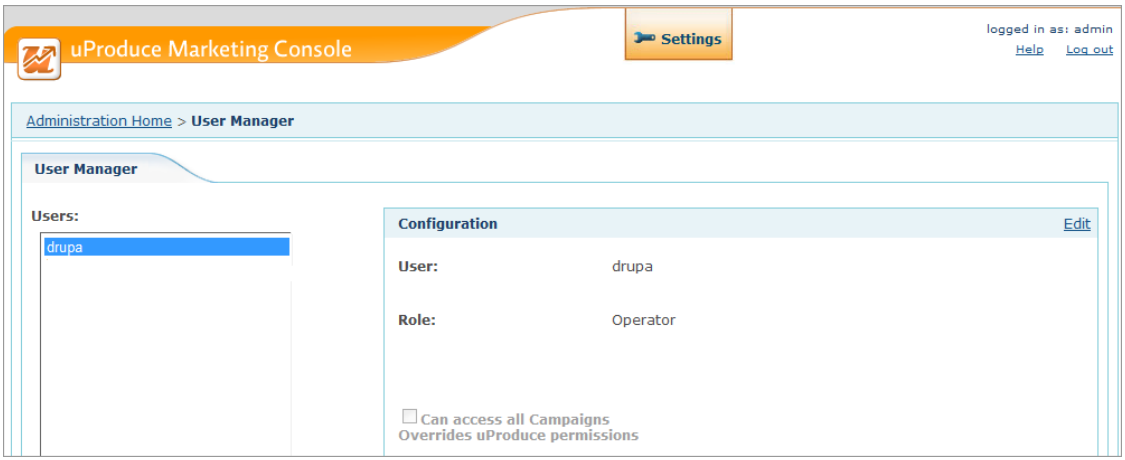
All uProduce users who have access to tracked campaigns are automatically defined as Marketing Console users.

The uProduce administrator is automatically defined as the Marketing Console administrator (admin). All other users are given one of the following roles:

- **Analyst**—a marketing analytics professional, who either works for the service provider (an internal user), or is a customer of the service provider (an external user). This is the default role given to all non-administrator uProduce users. Analysts run custom reports, defined especially for them by the service provider's Operator; or create their own reports (assuming the Service Level is Professional).
- **Operator**—a marketing analytics professional who works for the service provider (an internal user). The Operator edits and creates custom reports that are mainly intended for Analysts, and needs to test these reports in the Analyst's environment (i.e. Service Level). In addition to switching between Service Levels, the Operator may be given permission to view all campaigns (thereby overriding this user's uProduce permissions to access campaigns).

To access your user configuration, go to the **Users** tree and select a user (Figure 66).

Figure 66: Marketing Console—Administration page: User Manager



The **User Manager** allows you to configure the role of each user, and determine whether Operators have permission to access all Campaigns in your system.

Configuring User Roles

To configure a specific user's role, take the following steps:

1. In the **Users** pane, select the relevant user.
2. In the **Configuration** pane, set the Role drop-down list to either Analyst (the default option) or Operator.
3. Approve your changes by clicking **Save**.

   A confirmation message is displayed, stating the values were saved.

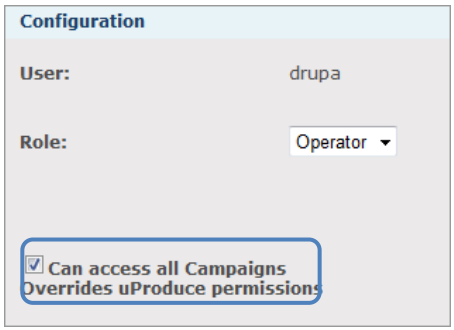
Allowing Operators to Access All Campaigns

You can give specific Operators permission to access all campaigns in the system, thereby overriding that user's uProduce permissions.

To allow a specific Operator to access all campaigns in the system, proceed as follows:

1. Make sure the relevant Operator is selected.
2. In the **Configuration** pane, check the **Can access all Campaigns** check box (Figure 67)

   Figure 67: Operator Service Level Drop-Down List

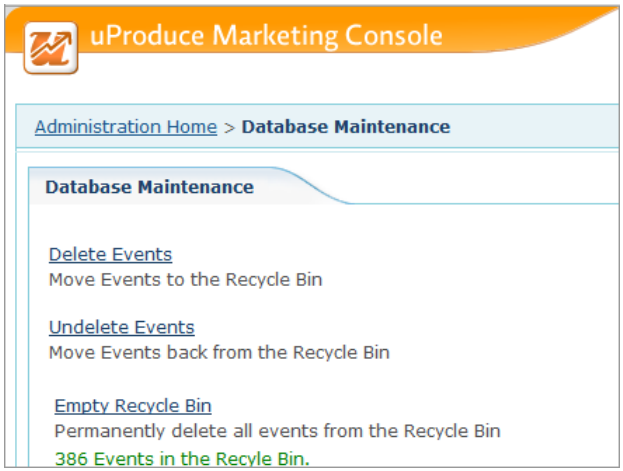
3. Approve your changes by clicking **Save**.

   A confirmation message is displayed, stating the values were saved.

Database Maintenance

The **Database Maintenance** window allows the administrator to manage events in the Tracking database.

Figure 68: Database Maintenance



The following operations can be performed on Tracking database events:

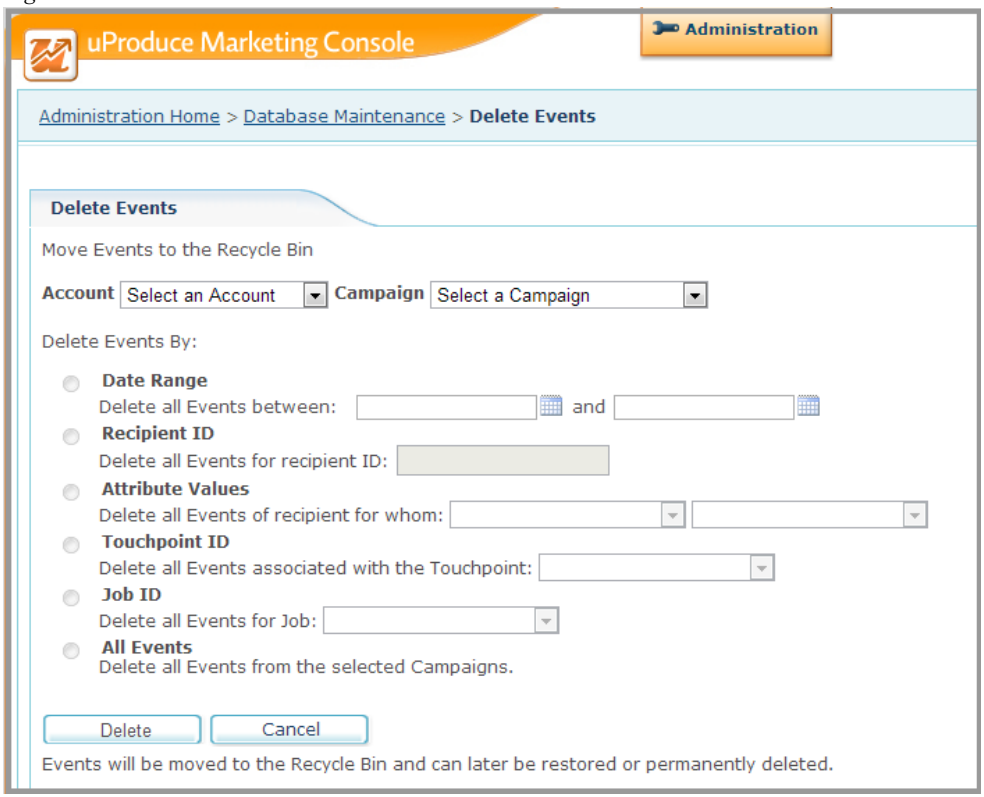
- **Delete Events**: moves Events to the Recycle Bin (see Deleting Events on page 69). The Events in the Recycle Bin will not appear in the Reports.
- **Undelete Events**: Restores the deleted Events from the Recycle Bin (see Undeleting Events on page 71)
- **Empty Recycle Bin**: Permanently deletes all the Events in the Recycle Bin (see Emptying the Recycle Bin on page 73).

Deleting Events

To delete Events:

1. In the **Database Maintenance** main window, click the **Delete Events** link. The **Delete Events** window is displayed (Figure 69):

Figure 69: Delete Events ID



2. In the **Account** drop-down list, select the Account whose Events you wish to delete. You can choose to select **All Accounts**.
3. In the **Campaign** drop-down list, select the Campaign whose Events you wish to delete. When **All Accounts** option is previously selected, **All Campaigns** is selected automatically and is the only option.
4. In the **Delete Events By** section, select the deletion criteria:

Deletion Criterion	Description
Data Range	Deletes all Events in the selected Data Range. Select the start and end date of the Date Range by clicking the **Calendar** icons.
Recipient ID	Deletes all Events for the given Recipient ID.
Attribute Values	Deletes all Events with the given Attribute Value. From the first drop-down list select an Attribute Name and assign it an Attribute Value from the second drop-down list.

Touchpoint ID	Deletes all Events associated with the Touchpoint ID selected from the drop-down list.
Job ID	Deletes all Events associated with the Job ID selected from the drop-down list.
All Events	Deletes all Events from the selected Campaign.

5. Click **Delete.** The deleted Events will be moved to the Recycle Bin and can later be restored (see Undeleting Events on page 71) or permanently deleted (see Emptying the Recycle Bin on page 73).

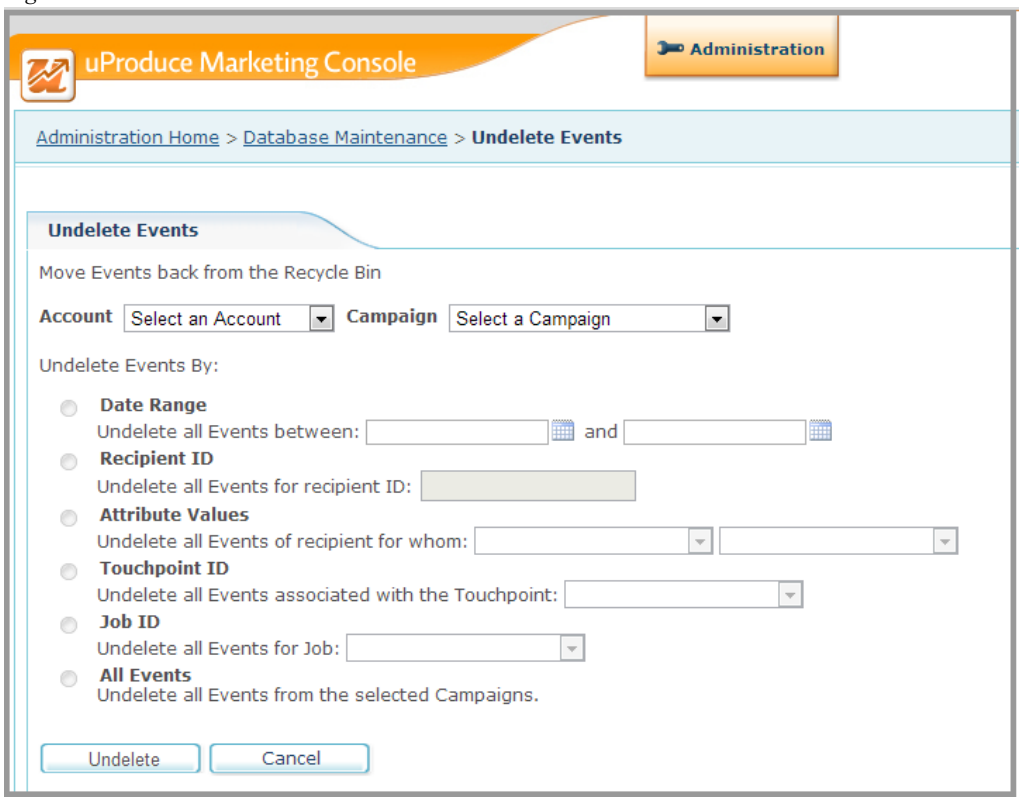
Undeleting Events

The **Undelete** operation restores the Events from the Recycle Bin. Please note that the Events that were permanently deleted using the **Empty Recycle Bin** (page 73) operation cannot be restored.

To undelete Events:

1. In the **Database Maintenance** main window, click the **Undelete Events** link. The **Undelete Events** window is displayed.

Figure 70: Undelete Events



2. In the **Account** drop-down list, select the Account whose Events you wish to delete. You can choose to select **All Accounts**.
3. In the **Campaign** drop-down list, select the Campaign whose Events you wish to delete. When **All Accounts** option is previously selected, **All Campaigns** is selected automatically and is the only option.
4. In the **Undelete Events By** section, select the deletion criteria:

Deletion Criterion	Description
Data Range	Restores all Events in the selected Data Range. Select the start and end date of the Date Range by clicking the Calendar icons.
Recipient ID	Restores all Events for the give Recipient ID.
Attribute Values	Restores all Events with the given Attribute Value. From the first drop-down list select the Attribute Name and assign it an Attribute Value from the second drop-down list.

Touchpoint ID	Restores all Events associated with the Touchpoint ID selected from the drop-down list.
Job ID	Restores all Events associated with the Job ID selected from the drop-down list.
All Events	Restores all Events from the selected Campaign.

5. Click **Undelete.** The undeleted Events will be restored from the Recycle Bin.

Emptying the Recycle Bin

The **Delete Events** operation moves the deleted Events to the Recycle Bin. In order to permanently delete those events, you should empty the Recycle Bin.

Emptying the Recycle Bin is irreversible, therefore it is highly recommended to backup the Tracking database prior to it.

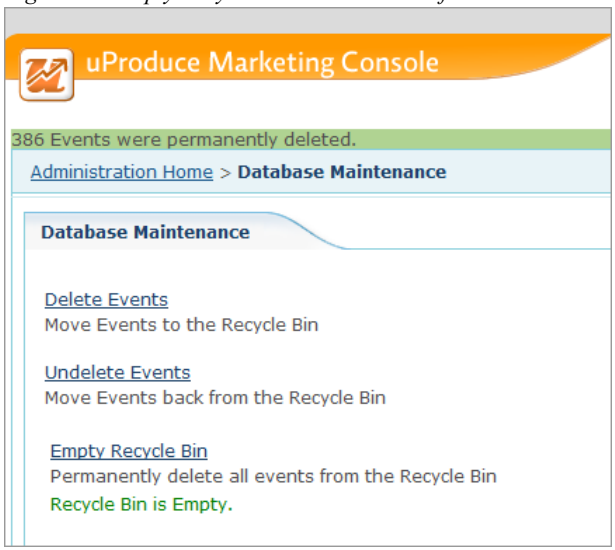
To empty the Recycle Bin:

1. In the **Database Maintenance** main window, click the **Empty Recycle Bin** link. The confirmation window is displayed.

Figure 71: Empty Recycle Bin

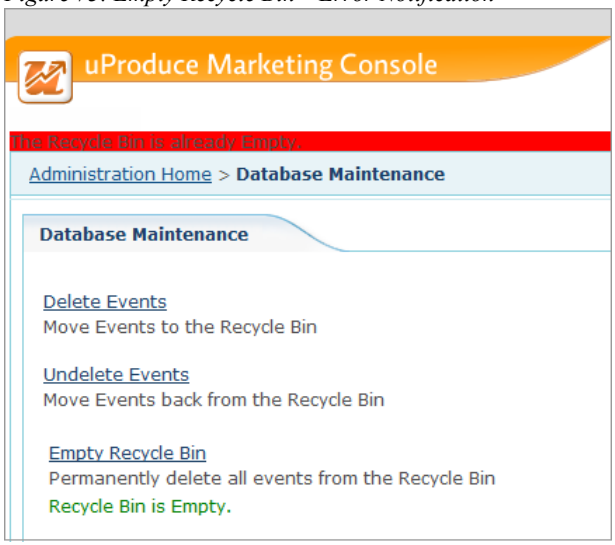
2. Click **Yes** to empty the Recycle Bin and permanently delete the Events.
3. A confirmation message is displayed in the green Notification bar showing the number of deleted Events.

Figure 72: Empty Recycle Bin – Success Notification



If the Recycle Bin is empty, a red error bar appears with the following message: " The Recycle Bin is already empty".

Figure 73: Empty Recycle Bin – Error Notification



Branding the Marketing Console Environment

Marketing Console allows you to customize the look and feel of the Marketing Console website to match your company's branding image.

In addition, the customized branding can be applied to all the accounts configured on your server, letting you apply a unique skin to each of your customer's accounts.

Branding the Marketing Console website, both for your company and for your customer's accounts is done using Microsoft's ASP.NET Theme technology, using Cascading Style Sheets (CSS).

Branding My Company in Marketing Console

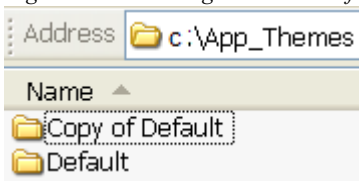
The following steps define how to customize the web-pages of Marketing Console to match your company's brand. In the steps bellow we'll be using examples based on two fictitious companies: Company *abc* (representing a print or marketing service provider) and Lion Communications (representing a customer of the print/marketing service provider).

*The following instructions assume that the IIS **wwwroot** folder is located at **c:\inetpub\wwwroot\marketingconsole\App_Themes.** Adjust these steps as needed to match the actual path of your **wwwroot** folder.*

How to brand the webpage's top banner of My Company:

1. Create a backup copy of the **Default** folder. In the: **c:\inetpub\wwwroot\marketingconsole\App_Themes** folder, copy the **Default** folder and paste it back to the same location. A **Copy of Default** folder will be created (Figure 74).

   Figure 74: Marketing Console—Default Folder Copied

2. If you wish to create a banner based on the existing "wave" design, you can use the plain banner file (**c:\inetpub\wwwroot\marketingconsole\App_Themes \XMPie\Images\master\MarketingConsole_banner.png**).

Figure 75: Marketing Console—Images\master folder

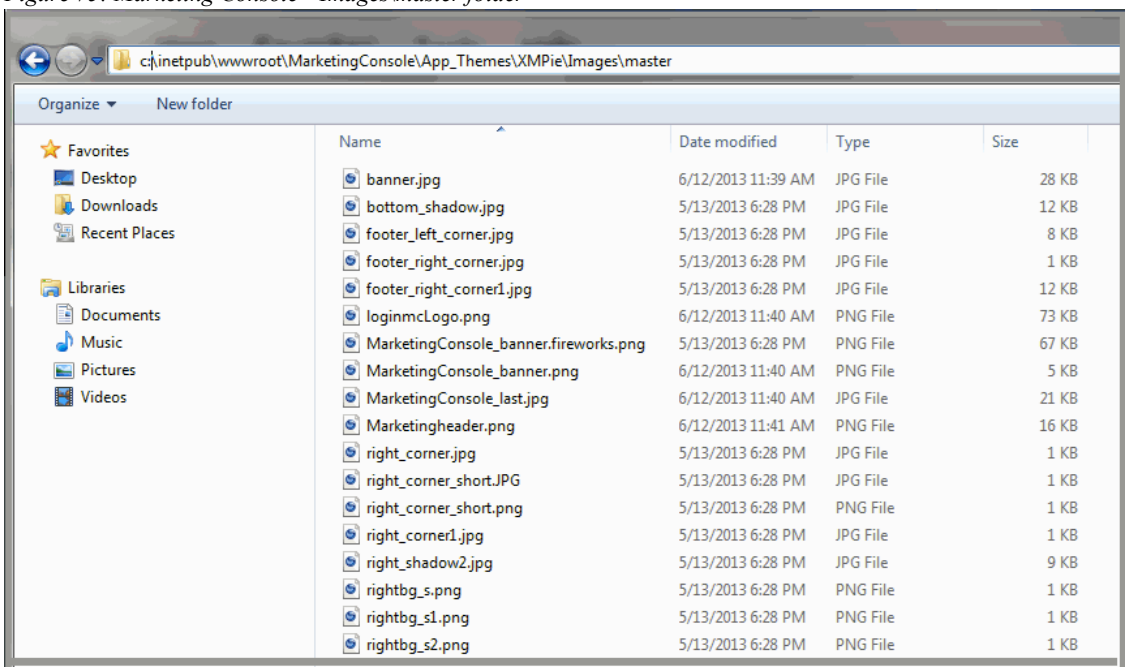


Figure 76: Marketing Console—MarketingConsole_banner.png

You can also use the Adobe Firework file of the above to create your own banner (c**:\inetpub\wwwroot\MarketingConsole\App_Themes\XMPie\Images\master\MarketingConsole_banner.fireworks.png**).

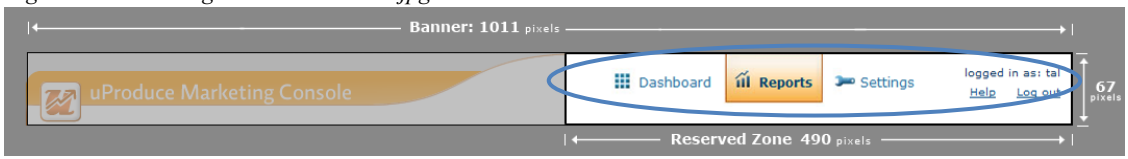
3. In the **Default** folder, under **Images\master** you will need to replace the **banner.jpg** banner file with your own file:

   The banner size in the **banner.jpg** file has the following dimensions:

   - Width: 1011 pixels.
   - Height: 67 pixels.

4. You can also customize your banner from scratch. Customize the banner while leaving the right area (490 x 67 pixels) free for Marketing Console tabs (**Dashboard**, **Report**, **Settings**) and links (**Help**, **Log out**, **View as**).

Figure 77: Marketing Console— banner.jpg Banner



How to brand the login window and the Internet Explorer Window Title of Marketing Console

1. To replace the title on the Login window and the Internet Explorer Window of Marketing Console, navigate to: **c:\inetpub\wwwroot\MarketingConsole\App_GlobalResources** folder.
2. Open the MCResouces.resx file in Notepad or any other text editor.

Note: *To brand the login window in a non-English version, go to the* ***c:\inetpub\wwwroot\MarketingConsole\App_GlobalResources\<locale>*** *folder and open the MCResouces.<locale>.resx file. For example, in a German installation, go to* ***c:\inetpub\wwwroot\MarketingConsole\App_GlobalResources\de*** *and open the MCResouces.de.resx file.*

3. Search for:

```
<data name="ApplicationTitle" xml:space="preserve">
    <value>XMPie uProduce Marketing Console</value>
</data>
```

4. Replace the highlighted text by the customized title and save the file.

The default application name ("uProduce Marketing Console") will be replaced with your customized application name.

Figure 78: Marketing Console— Company abc Marketing Console Login page

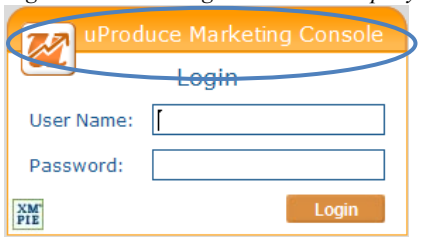
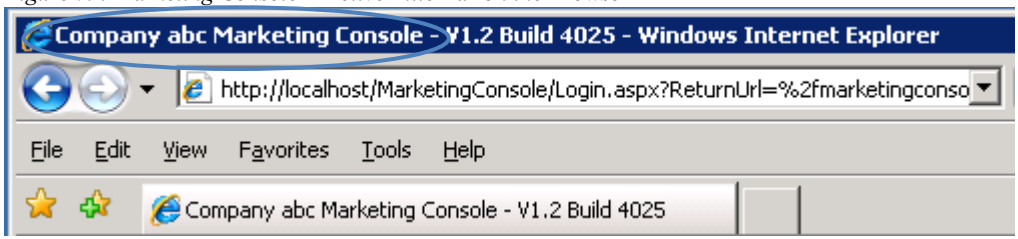


Figure 79: Marketing Console— Active Title Bar on the Browser



How to customize the "Theme.css" file:

Customizing the **Theme.css** file lets you control the background and appearance of the website.

1. Open the file **Theme.css** for editing under:
   c:\inetpub\wwwroot\marketingconsole\App_Themes\Default
2. Change the background color and font color using CSS technology.

To further understand and modify the backgrounds of the webpage itself, download the Internet Explorer Developer Toolbar from Microsoft's website:
http://www.microsoft.com/downloads/details.aspx?FamilyId=E59C3964-672D-4511-BB3E-2D5E1DB91038&displaylang=en

How to back up the "App_Themes" Folder:

The following only applies if you made changes to the Default Theme.

When uninstalling Marketing Console, back up the **App_Themes\Default** folder and its subfolders to a different location. This will retain the branding theme you created in the **App_Themes\Default** folder.

After the new installation, restore the **App_Themes\Default** folder back to the same location.

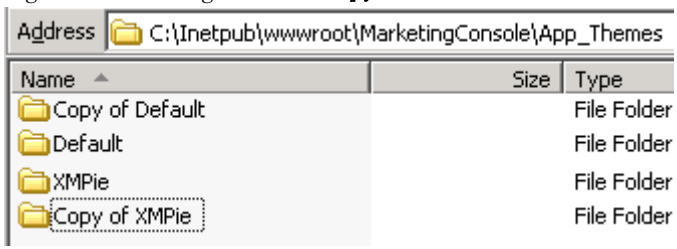
Branding Other Customers (Client accounts) in Marketing Console

The following steps define how to customize the web-pages of the Marketing Console to match your clients' company brand. Each client campaign is represented by a unique *Theme* folder on the server. This folder allows you to control the appearance of both the HTML elements and the ASP.NET controls, which appear in the web-page. You can create multiple *Theme* folders, each representing their respective company.

How to brand the top banner of the webpage with your clients' company logo:

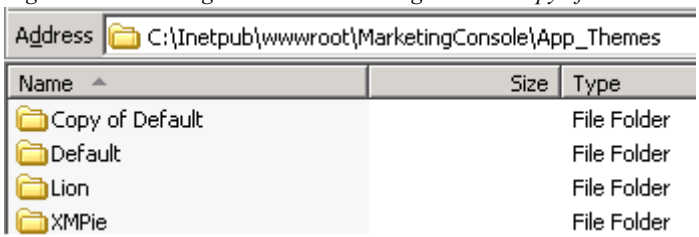
1. Create a backup copy of the **XMPie** folder. In the: **c:\inetpub\wwwroot\marketingconsole\App_Themes** folder, copy the **XMPie** folder and paste it back to the same location. A **Copy of XMPie** folder will be created, see Figure 80

   Figure 80: Marketing Console— Copy of XMPie Folder

2. Rename the **Copy of XMPie** to the customer's folder name, for example: **Lion**, shown in Figure 81.

   Figure 81: Marketing Console— Renaming Folder: Copy of XMPie to Lion

3. Replace the banner file **Marketingheader.png** with an image of your choice under: **c:\inetpub\wwwroot\marketingconsole\App_Themes\Lion\Images\master** . (Note that "Lion" is used for example purpose only. You should use the path to your own Images\master folder).

For information on the precise dimensions of the customizable area of the Marketing Console banner, see step 3 in Branding My Company in Marketing Console, on page 75.

In the example below, Figure 82 shows a customized banner for Lion Communications Campaign, and Figure 83 shows how this banner looks like once it is integrated in the Marketing Console application:

Figure 82: Marketing Console— Client Header File Banner

Figure 83: Marketing Console— Client Header File Banner in the Marketing Console

How to customize the "Theme.css" file:

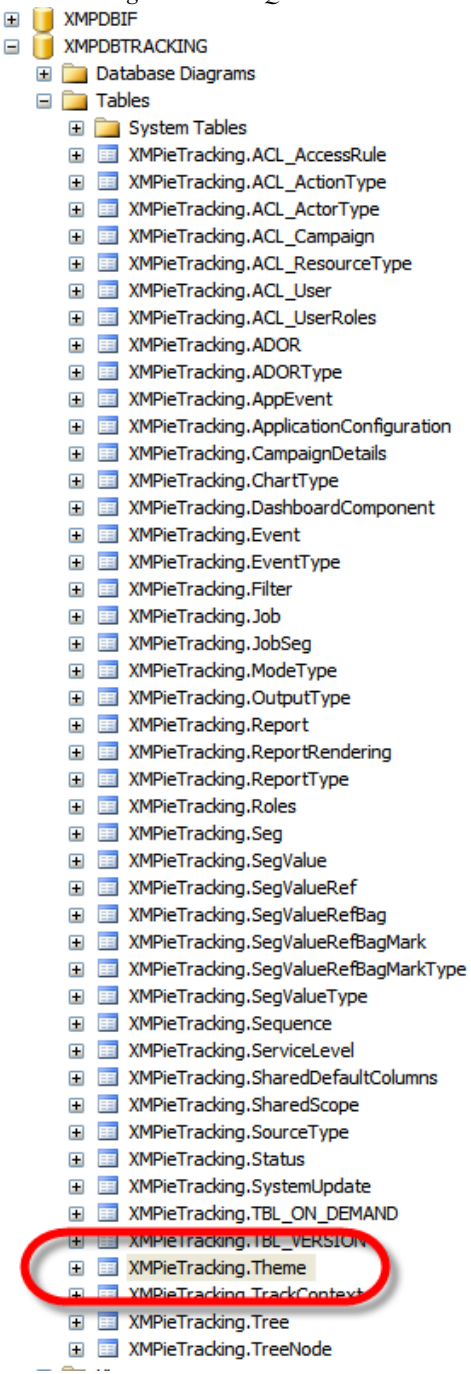
The customization of the **Theme. css** file for other customers is the same as described in How to customize the "Theme.css" file on page 78, with the only difference that you should now edit the Theme.css file located in your Campaign directory (for example, **c:\inetpub\wwwroot\marketingconsole\App_Themes\Lion)**, and not in the **Default** one**.**

The **Default** folder (under **c:\inetpub\wwwroot\marketingconsole\App_Themes**) sets the banner and background colors for all accounts on the server. When other folders are created with their unique **Theme.css** file, their settings will override the **Default** folder settings. Refresh the Marketing Console webpage to see the changes take effect.

How to add the App_Themes folder in the SQL database:

1. Open **Microsoft SQL Server Management Studio:** expand **XMPieTracking.theme**, under: **XMPDBTRACKING> Tables** (Figure 84):

Figure 84: Marketing Console— SQL Table: XMPie Tracking Theme



2. Right click **XMPieTracking.theme** and then click **Open Table**, from the options menu.
3. In the right pane add a new row, under the **Theme** column, type the folder name you set under the **App_Themes** folder, for example: **Lion**.
4. Under the **AccountID** enter the client's Account **ID**, listed in uProduce (Figure 85).

*To find the client's Account ID: login to uProduce, click the **Accounts** tab. The ID is displayed in the **ID** column, next to the Client's Name.*

Figure 85: Marketing Console— SQL Table: XMPie Tracking Theme Open Table

Table - XMPieTracking.Theme | Summary

	ThemeID	CustomerName	Theme	AccountID
	1	NULL	Lion	1
▶*	NULL	NULL	NULL	NULL

5. Repeat steps 1 to 10 for each client account you want to brand.

Each client account should be represented in the **XMPieTracking.theme** table.

Appendix A: Exporting and Importing Languages

Exporting the English Resources for Translation

Marketing Console administrators can export the English resource files to be sent for translation. This allows customers to localize the application into languages that are not provided out-of-the-box by XMPie.

To export the English resources:

Note: *The administrator must manually disable popup blocking in order to successfully export the file.*

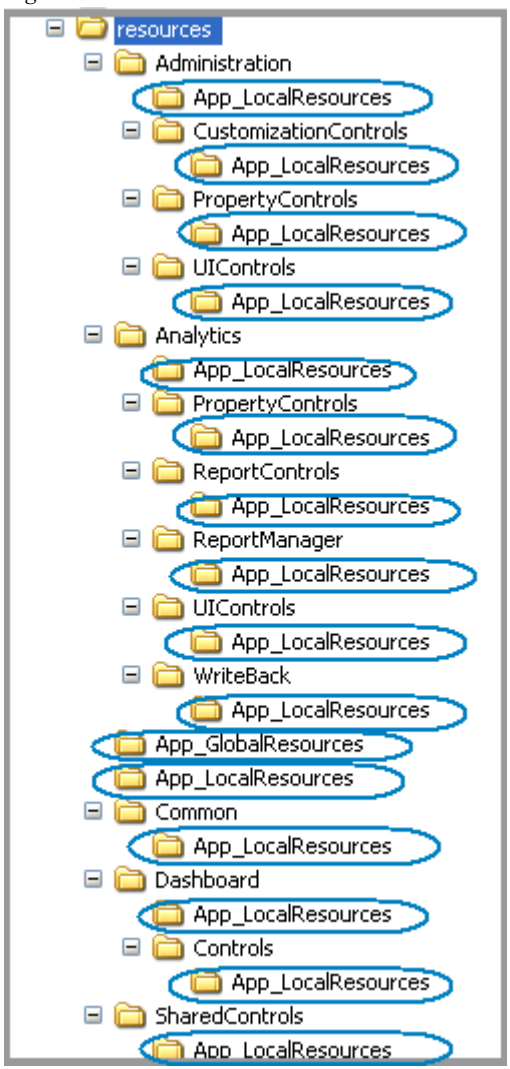
1. In the **Application Settings** page, click the **Export English** link.
2. Save the resource file to your preferred location.

Resources File Structure and Naming Conventions

The *marketingconsole.en.zip* file contains all the Marketing Console application resources. This file can be sent to translation and later imported back to the application (see Importing Translated Resources on page 86).

The resources are organized in folders according to application modules. In each folder, there is a sub-folder called **App_LocalResources** where the resource files are actually located. In addition, the resource files can be found in **App_GlobalResources** sub-folder.

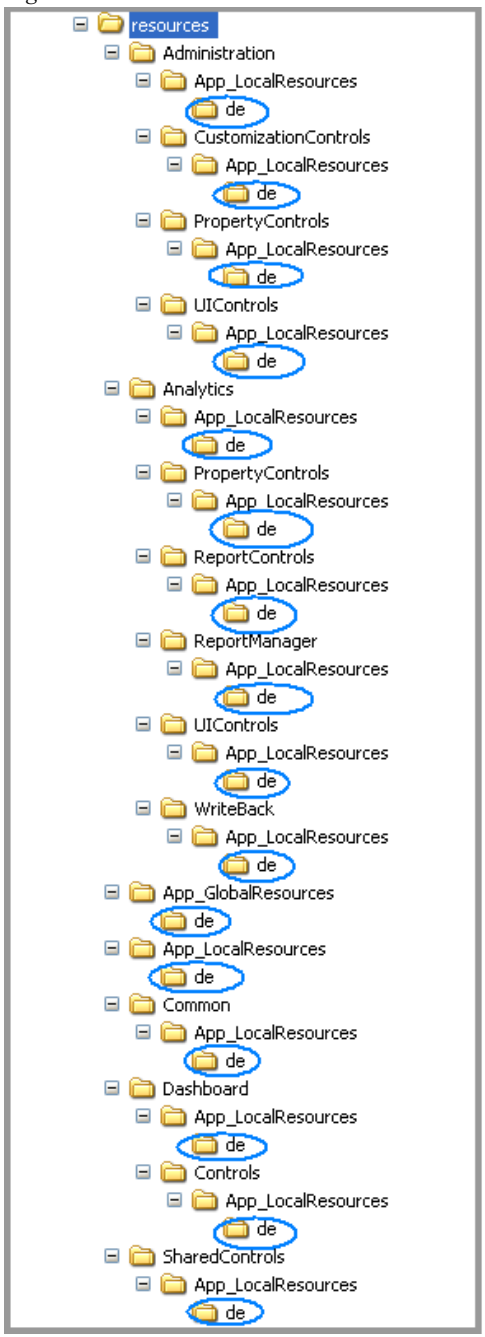
Figure 86: Resource File Structure



The translation company must return the translated resource file in the following form:

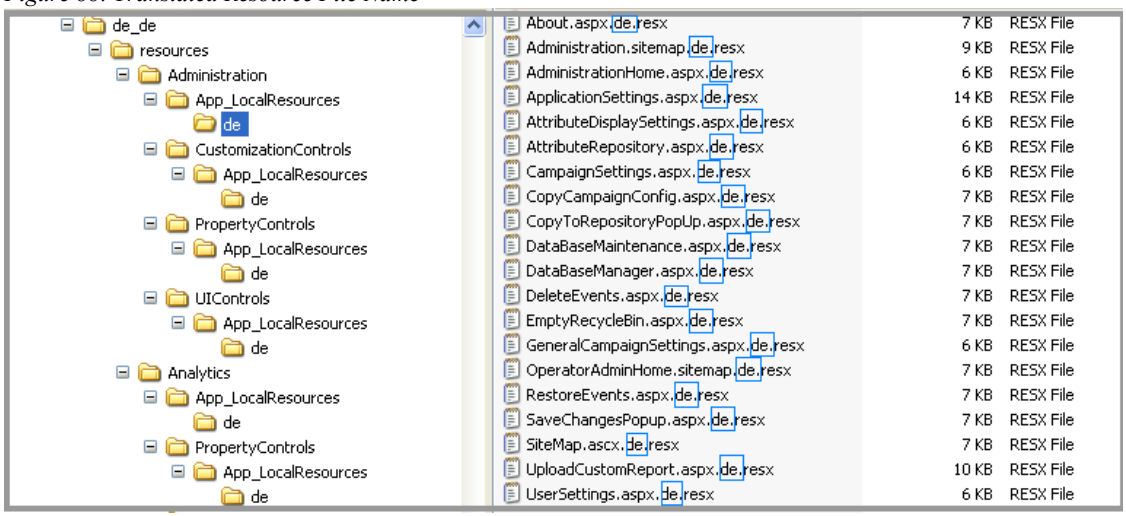
- The ZIP file must have a locale suffix (language only or language- culture) added to its name, for example *marketingconsole.**de**.zip* or *marketingconsole.**de-DE**.zip*
- The translated files must reside in the same directories as the source files.
- Under each **App_LocalResources** and **App_GlobalResources** sub-folder, a locale directory must be created, for example: **de** or **de-DE**.

Figure 87: Translated Resource File Structure



- The translated files must be located under **App_LocalResources/<Locale>** or **App_GlobalResources/<Locale>** sub-folders in each application folder.
- The locale suffix must be added to each resource file name (language only or language-culture):

Figure 88: Translated Resource File Name



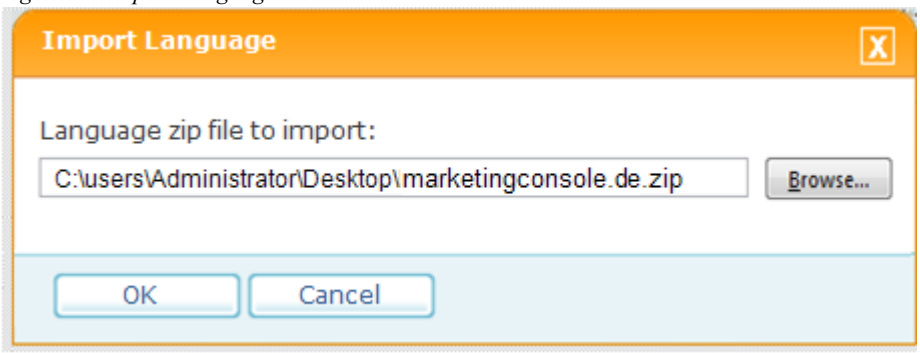
Importing Translated Resources

Once you have translated the *marketingconsole.en.zip* file, you can import it back to the Marketing Console Application and start using the application in the newly installed language.

To import the translated resources:

1. In the **Application Settings** page, click the **Import and Restart** link. The **Import Language** dialog is displayed:

Figure 89: Import Language



2. Click **Browse** to select the translated *marketingconsole.<locale>.zip* file.
3. Click **OK** to start the import. The application will validate the following parameters before starting the import:
   - The translated ZIP file must contain all the resource files.
   - The resource files must be named correctly: *<File Name>.<File Extension>.<Locale>.resx*. For example, the *ApplicationSettings.aspx.resx* file translated into German must be named *ApplicationSettings.aspx.**de**.resx or ApplicationSettings.aspx.**de-DE**.resx*
   - The imported resource file must not contain an XMPie-provided language.
   - The application database must be online.
4. Once the import is completed, the application is automatically restarted. During the restart, all the Marketing Console users are logged out and must login again.

   Successfully imported languages are listed in the **Application language** drop-down list and are available for use.

   If the imported language already exists, the imported resources override the existing translations in the database.

   A copy of the ZIP file is saved in the backup folder defined in the **web.config** file under the "ImportedLanguagePath" key. The default backup directory is: `C:\Users\Administrator\AppData\Roaming\XMPie\ImportedLanguages\.`

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