Oracle® Campaign Plus

Installing Oracle Campaign Plus

Release 11*i* for Windows NT

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Installation Overview

Installation of Oracle Campaign Plus requires you to follow a sequence of tasks that result in a properly installed and configured list management solution ready for first time use.

First, you select Oracle Call Center Services from the installation CD. This selection installs Oracle Campaign Plus on the server.

Next, Oracle Integrated Manager is installed on the administrator's and supervisor's workstations. Integrated Manager is the user interface that allows you to administer and monitor Campaign Plus.

Once installation is complete, you can refer to the Oracle Campaign Plus Concepts and Procedures documentation to create Campaign Plus services.

Installation Requirements

Installation requirements describe the recommended hardware and software needed to run Campaign Plus. You should consider these requirements the recommended configuration. While your installation may function with less than these requirements, system performance may degrade during periods of heavy usage or with larger configurations. Thoroughly review the installation requirements to be sure your call center has the hardware and software to effectively run Oracle Campaign Plus.

Hardware Requirements

Oracle Campaign Plus should be installed on a network-connected, NT server-class machine. Integrated Manager can be installed on a network-connected NT workstation.

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The hardware requirements for Oracle Campaign Plus and Integrated Manager are as follows:

Hardware	Recommended Requirement
Computer	Pentium 450 MHz with Y2K fixes
Operating System	Microsoft Windows NT 4.0 (Service Pack 3)
Hard Drive	1 GB free space
Other Drives	CD-ROM drive, or the ability to access a CD-ROM drive over the network
Monitor	256 color display
RAM	128 MB
Miscellaneous	Mouse or other pointing device
Internet Browser	Internet Explorer 4.0 or higher (with Active Desktop)

> **Note:** System size, number of users, and configuration may directly impact your individual requirements. Please confer with your Oracle Consultant about your specific requirements.

Windows NT User Accounts

Installation and maintenance of Oracle Call Center services or Campaign Plus services will require the setup of Windows NT user accounts. These accounts will need administrator-level user rights to each server running an Oracle CRM Oracle Call Center services or Campaign Plus services or a third party product for Oracle CRM that Oracle is responsible for installing or configuring. The creation of user accounts for administration of Oracle CRM services is the responsibility of the customer.

A user account belonging to the built-in Administrator group and having the right to log on as a service should be sufficient. Oracle user accounts are usually local to an Oracle CRM application server. If this is the case, a user account will have to be created for each Oracle CRM server. When performing maintenance on Oracle CRM application servers, you should always use the Oracle CRM user account set aside for that purpose.

Software Requirements

For Oracle Campaign Plus to operate correctly, you must have the proper supporting software installed. This software includes databases, ODBC drivers, client/server communications, and CTI middleware.

Databases   The Oracle CRM system database must be installed and configured prior to installation of Oracle Campaign Plus. You will be required to enter database information during installation and configuration of Oracle Campaign Plus.

Oracle Campaign Plus supports the following databases:

Database	Remote Communications with the Database Server
Oracle 8i	Oracle 8.0.5

Open Database Connectivity (ODBC)   ODBC drivers are required on each workstation running Oracle Campaign Plus.

The following ODBC drivers are supported:

Database	ODBC Driver
Oracle 8i	Oracle 8.00.05

Client/Server Communications

Oracle Campaign Plus software communicates with Oracle CRM vertical applications over a local area network (LAN).

Oracle Campaign Plus is based on client/server architecture, in which some processes are distributed among two or more computers. To facilitate communication between machines, the software operates within a Distributed Computing Environment (DCE). A specific instance of a distributed computing environment is called a "cell".

Within the cell, the DCE cell server keeps track of DCE clients. When a DCE client boots, it reports itself to the DCE cell. Within the client/server architecture, when a client needs the services of a server, the DCE client informs the DCE cell and the cell connects the client to the server.

The DCE cell must be located on a Windows NT server. It may reside on the same machine as another service with sufficient resources.

Oracle Campaign Plus requires Gradient PC-DCE 32 v2.2.1.

Install Gradient PC-DCE according to Gradient's instructions.

Oracle DCE configuration scripts install the DCE directories required in the cell by the Oracle Campaign Plus services.

Installation Worksheets

Installation worksheets are designed to help you gather the information required to install Campaign Plus. The information requested on the

worksheets is entered during the installation process. To successfully install Oracle Campaign Plus, please follow the worksheets.

Oracle Campaign Plus Installation Worksheet

Please complete the following:

- Identify the name of the DCE cell principal and the password for the DCE cell principal defined during DCE installation and configuration.

- Identify the destination directory for the Oracle Campaign Plus files. Choose one.

    - Accept the default, or

    - Choose a different destination directory: _____

- Identify the Oracle ODBC driver being used to access the Oracle system database.

- Specify the database driver parameters for the system database.

    - Oracle

      System database in tnsnames.ora: _____

- Identify the Windows NT administrator-level user account set up on the server that will be used to administer Oracle Campaign Plus.

- Identify the Service Monitor name (POM server name): This should ordinarily be the default name: CampaignPlusMonitor.

    If you changed this name during installation of Oracle Call Center Services, then use the name that you assigned: _____

Oracle Integrated Manager Installation Worksheet

Please complete the following:

- Identify the destination directory for the Oracle Integrated Manager files. Choose one.

    - Accept the default, or

    - Choose a different destination directory: _____

- Select an install option for Oracle Integrated Manager. Choose one.

> **Note:** When performing the initial installation, **Both** will be the only option available.

- **Both:** Installs both Oracle Integrated Manager components and Oracle Integrated Manger service controls.

- **Integrated Manager Components:** Installs only Oracle Integrated Manager components.

- **Service Controls:** Installs only Oracle Integrated Manager service controls.

- Select a setup type for Oracle Integrated Manager. Choose one.

  - **Administrator.** Installs the necessary files to allow administrative operations within Integrated Manager.

  - **Custom.** Allows you to choose specific snap-ins, sample consoles, and utilities to run with Integrated Manager.

  - **Minimal.** Installs the minimum required files to run Integrated Manager.

  - **Supervisor.** Installs the necessary files to allow supervisory operations within Integrated Manager.

- Identify the program folder for Oracle Integrated Manager. Choose one.

  - Accept the default, or

  - Choose a different program folder: _____

What are Installation Tasks?

The installation tasks are step-by-step instructions that guide you through the installation process. Many of the tasks are wizard based. You should follow them in the order presented to ensure that all steps needed to install Campaign Plus are completed.

There are several separate installation tasks required to install Oracle Campaign Plus. In the first task you install PC-DCE, then the Oracle Campaign Plus application software on the designated Campaign Plus server.

> **Note:** Oracle Integrated Manager is intended to be installed on administrator's and supervisor's workstations. Do not install Oracle Integrated Manager on the Campaign Plus server.

Next you install Oracle Integrated Manager on the administrator's and supervisors Windows NT workstations. Integrated Manager helps you configure and use Campaign Plus.

Installing and Configuring PC-DCE

Refer to the Gradient installation guide for instructions on installing PC-DCE. To protect your original Gradient License Pack file, Oracle recommends that you copy the Gradient License Pack to another disk, and use the copy of the file instead of the original.

The DCE cell must be on a server. It may be on the same machine as another service that has sufficient resources. The file path for installation on a server is X:\WINNT\PCDCE32\SERVERS\DISK1,where X:\ is the install drive.

Oracle DCE configuration scripts install the DCE directories required by the services. The configuration scripts are located in X:\Oracle\DCEConfiguration\scripts\DCE_2.0, where X:\ is the install drive.

Installing Oracle Campaign Plus

Use this procedure to install Oracle Campaign Plus on the designated Windows NT server.

Prerequisites

Before you can install Campaign Plus, you must first install Dialogic, Gradient PC DCE, CT Connect, Internet Explorer 4.0, and Oracle 8i.

> **Note:** Throughout this procedure, use of the default destination is strongly recommended.

Steps

1. Place the installation CD in the CD-ROM drive of the designated Campaign Plus server.

    If the setup program does not start automatically, go to the root directory on the installation CD and run setup.exe.

    > **Note:** You will have the option of installing Oracle Call Center Services (that is, Oracle Call Center vertical application extensions), and Oracle Integrated Manager. When manually starting the setup program, be sure to select the main setup.exe so that all of the installation product options will be presented.

2. The main setup program window appears. Click **Oracle Call Center Services**.

3. The setup program is initialized and the Welcome dialog box appears. Click **Next**.

4. The Software License Agreement dialog box appears. Click **Yes** to accept the terms of the license agreement.

5. From the User Information dialog box type your name and company and then click **Next**.

6. The Choose Destination Location dialog box appears. The Destination Folder area displays the default destination folder for the files. If this location does not exist, the setup program will create it.

   You have the following options:

   - Click **Next** to accept the default destination folder

   - Click **Browse** to choose another destination folder or create a new destination folder and (when you return to the Choose Destination Location dialog box) then click **Next**.

7. Select **Custom setup** and then click **Next**.

8. From the Select Components box, first clear all check boxes then select the following components:

   - Oracle Campaign Plus

   - Oracle Directory Maintenance

   - Oracle Service Monitor

   Click **Next**.

9. The Select Program Folder box appears, displaying the default program folder. If this program folder does not exist, the setup program will create it automatically.

   You have the following options:

   - Click **Next** to accept the default program folder

   - Select another program folder in the Existing Folders box and then click **Next**.

   - Type a new program folder in the Program Folders box and then click **Next**.

10. In the Account box, type the login for the Windows NT administrator-level user account as set up on the server that will be used to administer Oracle Campaign Plus. The default domain displayed is for the local machine. To specify a different domain and/or user, type the domain\account. Click **Next**.

> **Note:** Oracle suggests creating an Administration User Group as opposed to an individual account. This group should be entered as the account, thereby allowing multiple users to later have access to the shares when administering Campaign Plus or Predictive through Integrated Manager on a local Windows NT PC.

11. Review the setup parameters summary. Click **Next** to accept. The setup program starts installing Campaign Plus. It provides status of the installation. When the installation is finished the setup program prompts you to create ODBC system data sources.

12. Click **OK**. The ODBC Data Source Administrator appears.

13. If you have not already done so, use the ODBC Data Source Administrator to create ODBC system data sources for the Oracle CRM system database. Use the data source names identified in the Worksheet for Oracle Campaign Plus Installation.

14. In the ODBC Data Source Administrator dialog box, click **OK** to save your data sources and close the ODBC Data Source Administrator dialog box and return to the setup program; otherwise, click **Close**.

15. Select **Yes**, I want to restart my computer now option and remove the installation CD from the drive. Click **Finish**.

16. If you are planning to install Oracle CRM applications the installation is complete after the computer restarts. You may now move to the administrator's and supervisor's workstations and install Oracle Integrated Manager. Refer to the "Installing Oracle Integrated Manager" section in this document for detailed steps.

Installing Oracle Integrated Manager

This procedure installs Oracle Integrated Manager on the designated Windows NT administrator's and supervisor's workstations.

Prerequisites

Before you can install Integrated Manager, you must first install Dialogic, Gradient PC DCE, CT Connect, Internet Explorer 4.0, and Oracle 8i.

> **Note:** Throughout this procedure, use of the default destination is strongly recommended.

Steps

1. Place the installation CD in CD-ROM drive of the administrator's or supervisor's workstation.

   If the setup program does not start automatically, go to the root directory on the installation CD and run setup.exe.

   The main setup program window appears.

2. Click **Oracle Integrated Manager**.

3. The setup program initializes and the Welcome dialog box appears. Click **Next**.

4. The Software License Agreement dialog box appears. Click **Yes** to accept the terms of the Software License Agreement.

5. Type your name and company and then click **Next**.

6. The Choose Destination Location dialog box appears. The Destination Folder area displays the default destination folder for the files. If this location does not exist, the setup program will create it for you. You have the following options:

   - Click **Next** to accept the default destination folder

   - Click **Browse** to choose another destination folder or create a new destination folder.

7. Select install options. Note that the initial installation displays **Both** as the only option. Click **Next**. Post initial installation will have the following options:

   Both. Installs both Oracle Integrated Manager components and Oracle Integrated Manger service controls.

   Integrated Manager Components. Installs only Oracle Integrated Manager components.

   Service Controls. Installs only Oracle Integrated Manager service controls.

8. From the Setup Type dialog box, select the desired setup option. You have the following options:

   Administrator installs the necessary files to allow administrative operations within Integrated Manager.

   Custom allows you to choose specific snap-ins, sample consoles, and utilities to run with Integrated Manager.

   Minimal installs the minimum required files to run Integrated Manager.

Supervisor installs the necessary files to allow supervisory operations within Integrated Manager.

If Administrator, Minimal, or Supervisor is selected, click **Next**. The Integrated Manager dialog box appears. Go to step 10.

If Custom is selected, click **Next**. The Select Components dialog box appears. Continue to step 9.

9. From the Select Components box, first clear all check boxes then select the desired components. Oracle Campaign Plus requires all the components to operate properly. If you are reinstalling a specific component, then select from the following:

   Snapins installs Primary, Monitoring, Operations, and Service Configurations snapin components.

   Utilities installs ACD Pipe control, Predictive Message control, and Registry Configuration control.

   Sample Consoles installs sample consoles that provide common functionality for Administrator, Supervisor, Monitoring, and Registry Configuration. It also includes a empty console that you can customize.

   > **Note:** All the options must first be unchecked, then selected to ensure all subcomponents are installed.

10. Click **Next**.

11. The Program Folders box displays the default program folder for the programs. If this program folder does not exist, the setup program will create it for you.

    You have the following options:

    - Click **Next** to accept the default program folder

    - Select another program folder in the Existing Folders box and then click **Next**.

    - Type a new program folder in the Program Folders box and then click **Next**.

12. Review the setup parameters summary. Click **Next**. The setup program starts installing Campaign Plus. It provides status of the installation.

> **Note:** Three message windows will appear in succession. The first is a message about installing Internet Explorer 4.0 (click **OK** to continue), the second is a message about installing Gradient DCE (click **OK** to continue), the third is a message about the registry settings (click **OK** to clear).

13. Select **Yes, I want to restart my computer now** and remove the installation CD from the drive. Click **Finish**.

    You have now completed the installation of Integrated Manager. Refer to the *Oracle Campaign Plus Concepts and Procedures* documentation for information about creating individual Campaign Plus services.