# Administration Guide

eaMarket

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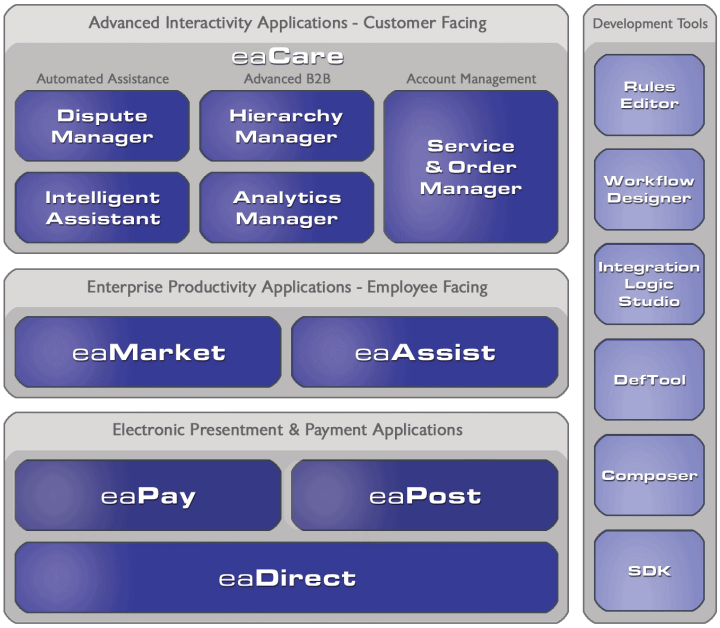
# Preface

## About Customer Self-Service and eaSuite™

edocs has developed the industry's most comprehensive software and services for deploying Customer Self-Service solutions. **eaSuite™** combines electronic presentment and payment (EPP), order management, knowledge management, personalization and application integration technologies to create an integrated, natural starting point for all customer service issues. eaSuite's unique architecture leverages and preserves existing infrastructure and data, and offers unparalleled scalability for the most demanding applications. With deployments across the healthcare, financial services, energy, retail, and communications industries, and the public sector, eaSuite powers some of the world's largest and most demanding customer self-service applications. eaSuite is a standards-based, feature rich, and highly scalable platform, that delivers the lowest total cost of ownership of any self-service solution available.

eaSuite is comprised of four product families:

- Electronic Presentment and Payment (EPP) Applications
- Advanced Interactivity Applications
- Enterprise Productivity Applications
- Development Tools




**Electronic Presentment and Payment (EPP) Applications** are the foundation of edocs' Customer Self-Service solution. They provide the core integration infrastructure between organizations' backend transactional systems and end users, as well as rich e-billing, e-invoicing and e-statement functionality. Designed to meet the rigorous demands of the most technologically advanced organizations, these applications power Customer Self-Service by managing transactional data and by enabling payments and account distribution.

**eaDirect™** is the core infrastructure of enterprise Customer Self-Service solutions for organizations large and small with special emphasis on meeting the needs of organizations with large numbers of customers, high data volumes and extensive integration with systems and business processes across the enterprise. Organizations use eaDirect with its data access layer, composition engine, and security, enrollment and logging framework to power complex Customer Self-Service applications.

**eaPay™** is the electronic payment solution that decreases payment processing costs, accelerates receivables and improves operational efficiency. eaPay is a complete payment scheduling and warehousing system with real-time and batch connections to payment gateways for Automated Clearing House (ACH) and credit card payments, and payments via various payment processing service providers.

**eaPost®** is the account content distribution system that handles all the complexities of enrollment, authentication and secure distribution of summary account information to any endpoint, while also bringing customers back the organization's Website to manage and control their self-service experience.

**Advanced Interactivity Applications** are a comprehensive set of advanced customer-facing self-service capabilities that enable the full range of business and consumer customer service activities. These sophisticated modules have the flexibility to completely customize the Customer Self-Service solution to meet vertical industry and specific company requirements.

**eaCare™** consists of a rich set of sophisticated self-service modules – Dispute Manager, Intelligent Assistant, Hierarchy Manager, Analytics Manager, and Service and Order Manager - for automated assistance, advanced business-to-business applications and account management. These capabilities come together to create a web self-service dashboard for customers to access all service offerings from a single, easy-to-use interface. eaCare's modularity accelerates time to market with components that can be deployed incrementally in a phased approach.

**Enterprise Productivity Applications** are employee-facing solutions that empower customer service representatives, sales agents, account managers, marketing managers, broker-dealers and channel partners within an organization and external partner organizations to facilitate self-service and to support assisted service. Employees leverage edocs' Customer Self-Service solution to deliver customer service, access information, create and deploy marketing and customer service content, and perform activities for the benefit of customers.

**eaAssist™** reduces interaction costs and increases customer satisfaction by enabling enterprise agents – customer service representatives (CSRs), sales agents, broker-dealers and others – to efficiently access critical account data and service-related information to effectively service customers. Through its browser interface designed especially for the enterprise agent, eaAssist enables agents to take advantage of customer-facing online capabilities to provide better service by more efficiently resolving customer account inquiries at the point of customer contact.

**eaMarket™** is the personalization, campaign and content management solution that enables organizations to increase revenue and improve customer satisfaction by weaving personalized marketing and customer service messages throughout the Customer Self-Service experience. The transactional account data that provides the foundation for a Customer Self-Service solution – such as transaction activity, service or usage charges, current task and prior service history – bring valuable insight into customers and can help optimize personalized marketing and customer service campaigns. eaMarket leverages that data to present relevant marketing and customer service messages to customers.

edocs' **Development Tools** are visual development environments for designing and configuring edocs' Customer Self-Service solutions. The Configuration Tools encompass data and rules management, workflow authoring, systems integration, and a software development kit that makes it easy to create customer and employee-facing self-service applications leveraging eaSuite.

# About eaMarket

**eaMarket** is the personalization management solution that enables companies to increase revenue and improve customer satisfaction by weaving personalized marketing and customer service messages throughout the online account management experience.

The online statement is the best platform to create recurring one-to-one relationships with your customers, as it provides personal, time-sensitive and financially relevant information. Transactional account data – such as purchase history, investment activity and service and usage charges – allows you to gain the most insight into your customers and optimally personalize your marketing campaigns. With eaMarket, you can deploy targeted marketing and customer service messages based on the customer's dynamic account and transaction data.

Online marketing demands real actions in real time. eaMarket allows your marketing team to design, schedule, evaluate, and manage the entire process from anywhere on your network – all from a browser-based user interface that operates without heavy involvement from your IT department.

Move beyond your competition. Use eaMarket to send your customers personalized e-serts™ instead of envelopes full of one-size-fits-all inserts. Increase cross-sell and up-sell offer acceptance rates with personalized messages that are based on your customer's actual account activity.

With eaMarket, you can deliver the right message to the right customer at the right time.

# About this Guide

This guide is intended for system administrators who setup and maintain the eaMarket environment. It assumes you have successfully installed eaMarket and are ready to set it up for use.

# Related Documentation

This guide is part of the eaMarket documentation set. For more information about implementing your eaMarket application, see one of the following guides:

| Online | How to Access |
|---|---|
| Help | Select Help from the eaMarket configuration screens. |
| A PDF of this guide | A PDF of this guide is available on the eaDirect product CD-ROM. |

This guide is part of the eaMarket documentation set. For more information about implementing your eaMarket application, see one of the following guides:

| Print Document | Description |
|---|---|
| *Campaign Management UserGuide* | Explains what you need to know to use the eaMarket application to manage marketing promotions, content, business conditions, and workflow. |
| *eaMarket™ Installation and Configuration Guide: for the Solaris ™ Operating Environment ™ Software* | Explains how to install and configure eaMarket for a Solaris environment. |
| *eaMarket™ Installation and Configuration Guide: for the Windows/NT ™ Operating Environment ™ Software* | Explains how to install and configure eaMarket for a Windows environment. |
| *eaDirect Installation and Configuration Guide* | How to install eaDirect and configure it in a distributed environment. |
| *Data Presentation Production Guide* | How to set up and run a live eaDirect application in a J2EE environment. |
| *Deploying and Customizing J2EE Applications* | How to customize J2EE web applications for deployment with the eaSuite. |

The eaSuite products eaDirect, eaPost, eaPay, and eaAssist provide their own documentation.

# Contacting edocs Technical Support

Technical support is available to customers who have valid maintenance and support contracts with edocs. Technical support engineers can help you install, configure, and maintain your edocs application.

edocs provides global Technical Support services from the following Support Centers:

**US Support Center**
Natick, MA
Mon-Fri 8:30am – 8:00pm US EST
Telephone: 508-652-8400

**Europe Support Center**
London, United Kingdom
Mon-Fri 9:00am – 5:00 GMT
Telephone: +44 20 8956 2673

**Asia Pac Rim Support Center**
Melbourne, Australia
Mon-Fri 9:00am – 5:00pm AU
Telephone: +61 3 9909 7301

**Customer Central**
https://support.edocs.com

**Email Support**
mailto:support@edocs.com

When you report a problem, please be prepared to provide us the following information:

- What is your name and role in your organization?
- What is your company's name?
- What is your phone number and best times to call you?
- What is your e-mail address?

- In which edocs product did a problem occur?
- What is your Operating System version?
- What were you doing when the problem occurred?
- How did the system respond to the error?
- If the system generated a screen message, please send us that screen message.
- If the system wrote information to a log file, please send us that log file.

If the system crashed or hung, please tell us.

# Overview of eaMarket Administration

1

## Setting up a new eaMarket System

Once you have installed eaMarket, you must specify various system administration parameters to set up the new eaMarket system for your organization.

In eaMarket, a “user” is anyone who uses eaMarket, including system administrators.

To set up a new eaMarket application, you must:

1. Create groups of users and grant workflow approval and other privileges for each group.
2. Create users and assign users to one or more groups.
3. Set up the eaDirect servers in eaMarket, and register and import eaDirect applications from the servers.
4. Create a data store in eaMarket (after configuring your database and web application server to support data stores during installation).
5. Specify various eaMarket system settings (preferences) such as default style and operational model.
6. Create libraries and populate them with content.

Follow the instructions in the next chapter to complete each administrative setup task.

You must have the appropriate user privileges to perform system administration tasks. eaMarket provides a default group and user to help you get started. The default user is called “administrator” with password “admin” and is assigned to the SuperAdministrators group, which has all privileges.

# Coordinating eaMarket Promotions with eaDirect Production

For promotions to appear in the intended statements, you must coordinate with the eaDirect system administrator and the eaDirect production schedule.

In eaDirect, the system administrator ordinarily uses the eaDirect Command Center to publish new version sets (statement design files, including marketing content files) whenever statement design or content changes. eaMarket lets you automatically publish promotion content files to the eaDirect production environment according to the specified deployment schedule. However, deploying a promotion in eaMarket is only part of the larger production process required to enable content to appear in the intended statements during the scheduled time period.

For promotions to deploy successfully, marketing must coordinate directly with the eaDirect system administrator who manages the entire production environment. The eaDirect system administrator carefully times the placement of regularly generated data input files, such as monthly statements, on the application’s production input directory and the running of the corresponding Indexer batch job with the publishing of the version sets those data input files require.

These production events are highly date- and time-interdependent and your eaDirect system administrator must manage this process.

See the *Data Presentation Production Guide* for more information.

# Maintaining an eaMarket System

You may periodically need to perform the following administration tasks to maintain an ongoing eaMarket system:

- Import application information from an eaDirect server if it changes
- Add or delete users
- Modify assigned eaMarket system privileges
- Edit content libraries
- Change your password (profile)
- View system logs and reports to troubleshoot failures in eaMarket
- Edit eaMarket system settings (preferences)

# Administration Tasks 2

## Adding and Maintaining Groups, Users, and Privileges

To set up a new eaMarket system, you must first set up groups, define privileges for each group, then set up users and assign them to a group.

Define groups according to the type of activities they perform and the corresponding types of privileges they need. You can grant any combination of the following eaMarket management privileges to a group:

- Server management: Add, remove, modify, or search a server, or import applications
- Data store management: Add, remove, or modify a data store
- User management: Manage groups and/or users
- Library management: Add, remove, or modify a library
- Category management: Add, remove, or modify a category
- Content management: Add, remove, modify, or search for content
- Promotion management: Add, remove, modify, search, or stage promotions, no approval required, or view Dashboard. If a group has "No approval required" privilege, the promotions those users create do not go through the workflow process for approval, but are immediately eligible for deployment.
- Administration: View log, clear log, hold agent, resume agent

You can grant a group privileges to add, remove, and/or modify libraries, categories, or content, but you must assign a group access to individual libraries to enable them to open the library (otherwise the Open button does not appear on the Content Library screen). When you set up a library you specify which groups can access the library.

Also, some privileges are hierarchical. If a user belongs to a group with the privilege to delete libraries, they automatically have privileges to delete categories and content. Similarly, if a user has the privilege to delete data stores, they automatically have the privilege to delete libraries, categories, and content as well.

Here are some factors to consider when creating groups and assigning privileges:

- Set up approval groups around functional groups.
- Assign users to only one group to avoid complications that could occur due to conflicting group privileges.
- A user's level in the organization may determine their level of privileges.
- Consider your organization's workflow and volume of ads to be approved; does each promotion need to have all groups' approval every time? Consider what your default workflow should be, then manually add other groups to the workflow for each promotion.
- During server setup, you assign groups to each server, enabling users to work with applications on that server (users cannot import from the server, however).

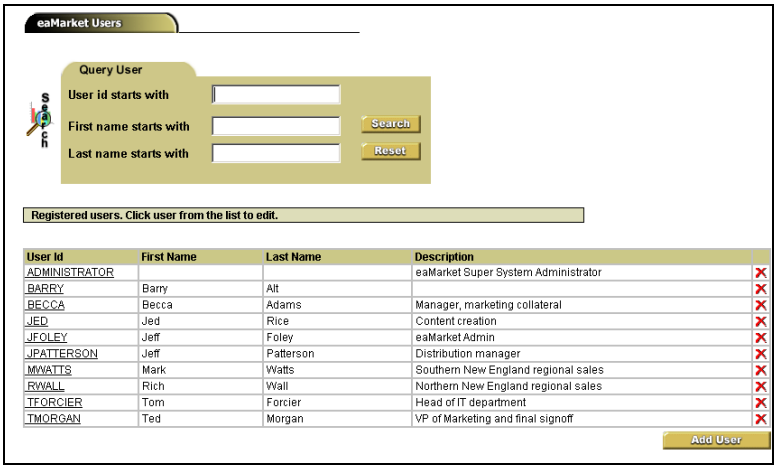
eaMarket comes with two default groups, SuperAdministrators and Administrators, which have identical privileges (all privileges) and a default user. The default user is called "administrator" with password "admin" and is assigned to SuperAdministrators. You cannot customize the default groups.

Once you set up your eaMarket users, you can search the user list by user ID or name, or edit a user's information.

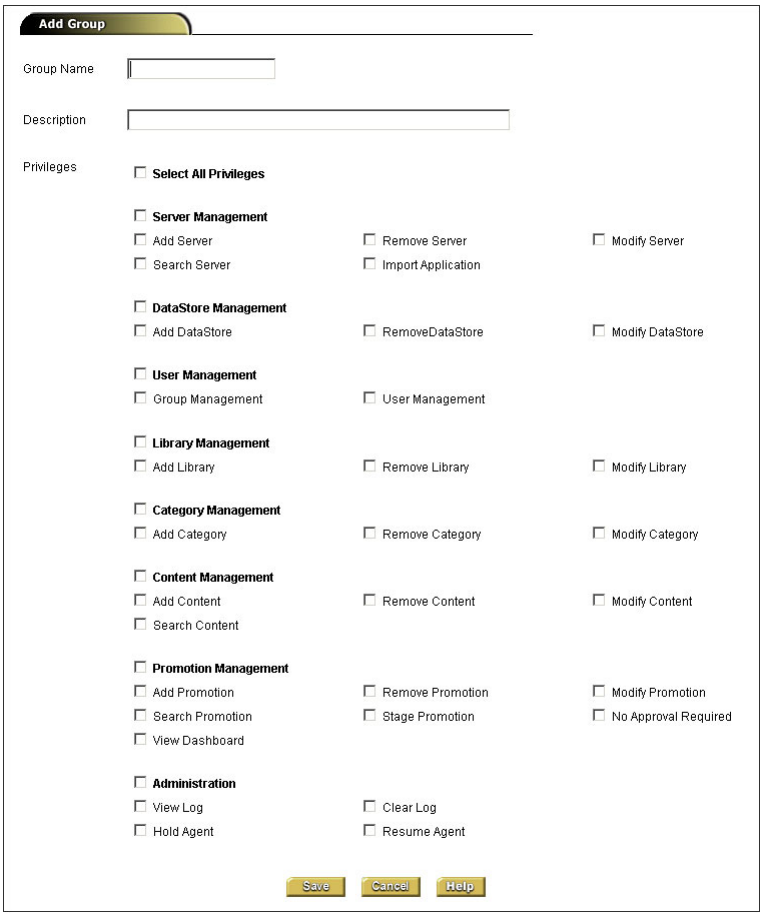
### To add a group:

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:

2. Select **`eaMarket Users`**. The eaMarket Users screen appears:




3. Click the **`Add User`** button. In the Add User screen, click the **`Add Group`** button. The Add Group screen appears:

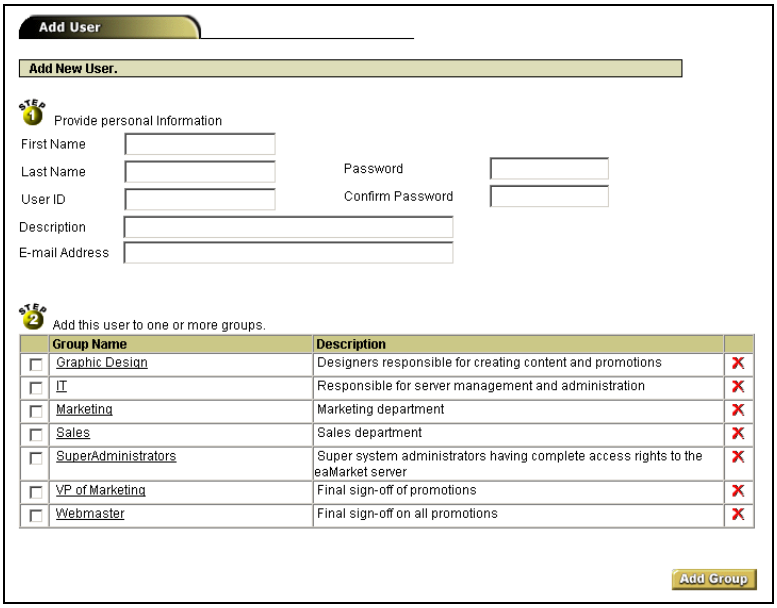



4. Enter the group name and description, and select the group privileges. You can give all privileges to the group by selecting the **`Select All Privileges`** check box.

5. Click **`Save`**.

### To add a user:

1. In the eaMarket Users screen, click the **`Add User`** button. The Add User screen appears:



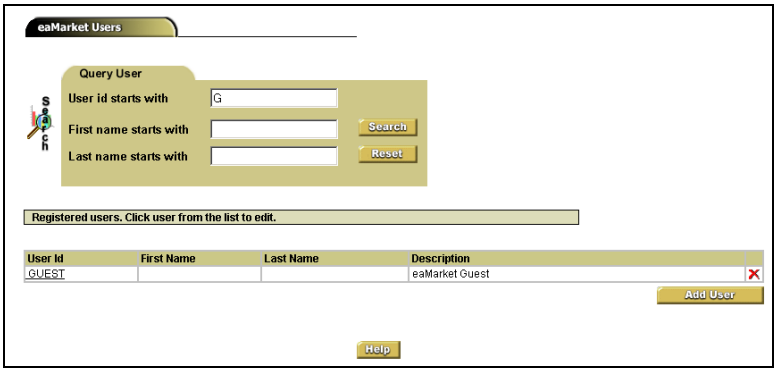

2. Enter the personal information for the user.

3. Assign the user to one or more groups and click **Save**.

### To search for a list of users (run a query):

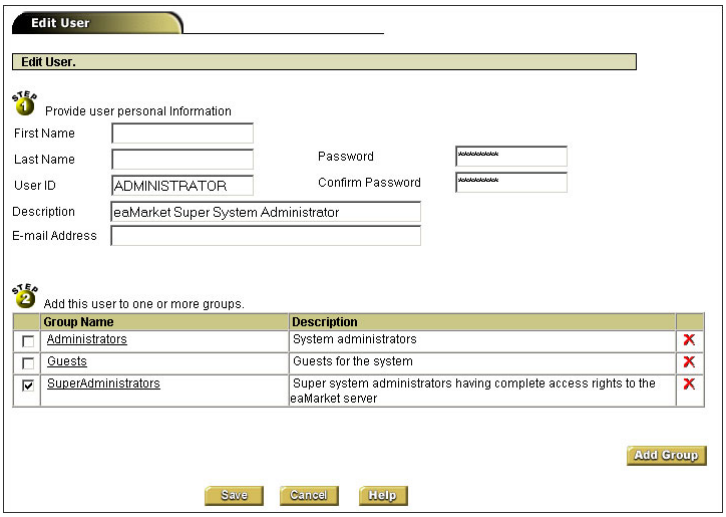
To query the list of eaMarket users:

- In the eaMarket Users screen, enter the search criteria in the Query User text boxes and click **Search**. The results of your query appear:




## To edit a user:

1. In the eaMarket Users screen, click the ID of the user you want to edit. The Edit User screen appears.




2. Make changes to the user's information. (You can also add groups from the Edit User screen; click the **`Add Group`** button.)

3. Click **`Save`** when finished.

### To delete a user:

In the eaMarket Users screen, click the button next to the user name. eaMarket removes the user from your list.

# Defining eaDirect Servers, Importing Application and View Information

After setting up groups and users for a new eaMarket system, you must:

1. **Define your eaDirect servers in eaMarket**, import (register) eaDirect applications from the servers. (Before defining your eaDirect servers, you must define groups and users, and specify their corresponding privileges.)

2. **Import all eaDirect applications on the eaDirect server.** Importing all applications available on an eaDirect server registers the application names in the eaMarket database. Once you have imported an application you can specify groups you want to assign as default approvers for the various stages of an application's workflow or specify whether promotion creators must specify which groups must review and approve promotions. If you add any new applications to the eaDirect server in the future, you must import again.

3. **Import the views or ALFs of the required applications (information about business conditions, sections, and templates for each application)**. eaMarket needs information about all sections and business conditions defined in an Application Logic File (ALF) to enable you to design promotions for the view. Importing the view adds information about an ALF's sections and business conditions along with the names of the associated templates to the eaMarket database. eaMarket uses the templates to let you preview a promotion in a statement. (An ALF is created by a developer or eaDirect statement designer using eaDirect's Composer tool, and contains the rules for presenting data extracted from the data input source in a template on the web or email, along with any business logic, or conditional statements.)

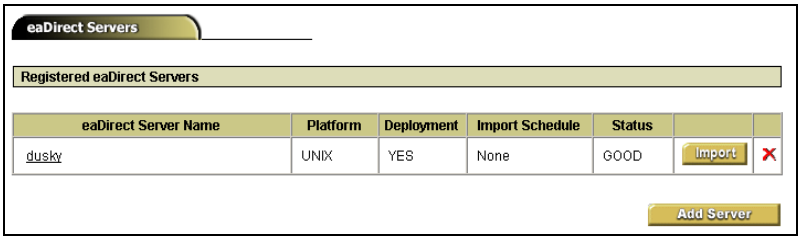
Once your eaMarket system is set up and in use, if an application's ALF file changes, you must import the view information into eaMarket again. Developers or eaDirect statement designers may change an ALF file using the eaDirect Composer tool, and the marketing department must coordinate with or accommodate these changes.

## Adding a server

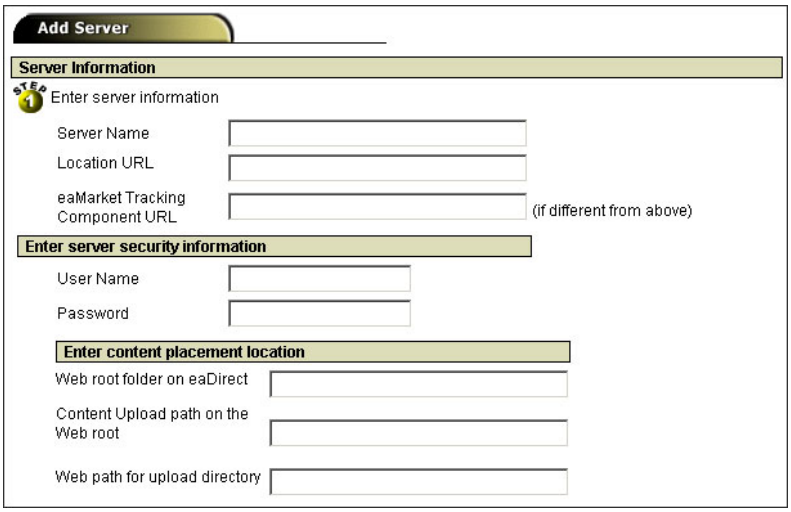
### To add a server:

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:

2. Select **`eaDirect Servers`**. eaMarket displays the eaDirect Servers screen:



3. In the eaDirect Servers screen, click **`Add Server`**. The Add Server page appears.




4. Specify a server name and the URL of the eaDirect server, such as http://pluto:9080.

5. If necessary, specify the URL for the eaMarket Tracking Component.

6. Specify "administrator" as the user name and "admin" as the password. (This user name and password are required for the current implementation of eaDirect).

7. Specify the web root folder on the eaDirect system. This is the same folder name given in the *edx_mwi.config* file. For example:

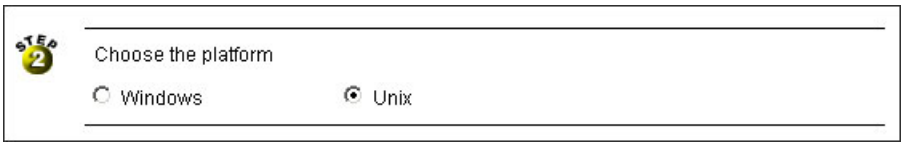
| Application Server | Folder |
|---|---|
| WebSphere | /opt/IBMHTTPD/htdocs/en_US/ |
| WebLogic 6.1 | C:\bea\wlserver6.1\config\mydomain\applications\DefaultWebApp |
| WebLogic 7.0 | C:\bea\weblogic700\config\mydomain\applications\DefaultWebApp |

This is the main folder where eaMarket promotion contents deploy.

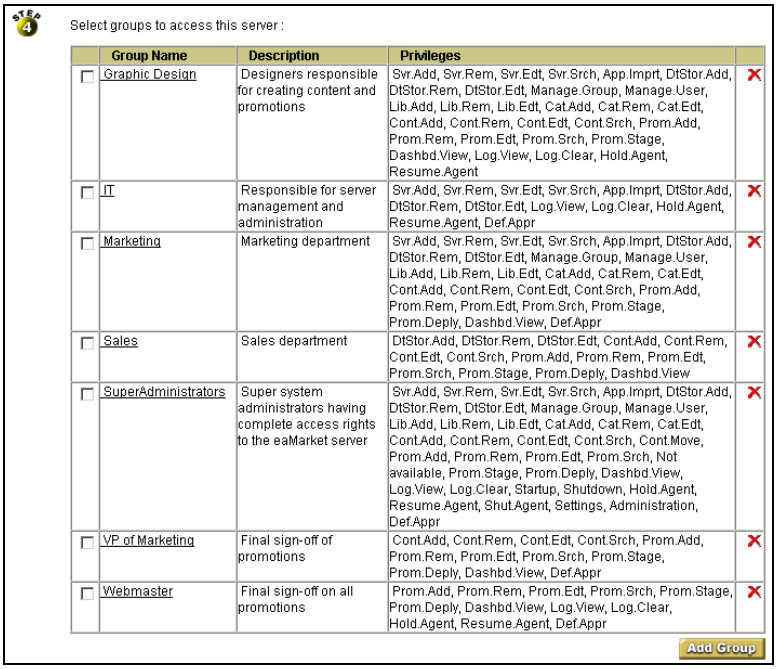
8. Specify *images/* as the content upload path. (This helps organize content being deployed on the eaDirect server. When deploying content, eaMarket copies content to this subfolder.)

9. Specify the web path. This should be `/` for Solaris and `/` for Windows.

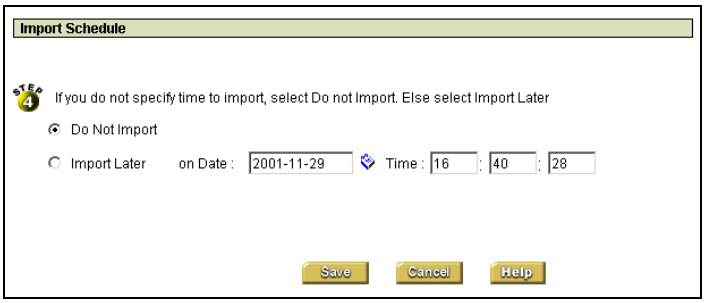
10. Specify the platform of the eaDirect server.




11. Select the groups you want to be able to access the server.



12. Select **`Do Not Import`** or **`Import Later`**. It is easier to select Do Not Import and manually import the server applications later. Do Not Import does not import any information from the eaDirect server, but adds an entry for the server in eaMarket. This option lets you choose to import information about only those applications you are interested in. If you select Import Later, you must specify a date and time to automatically import all information about *all* applications on the server (by the Application Import Agent).



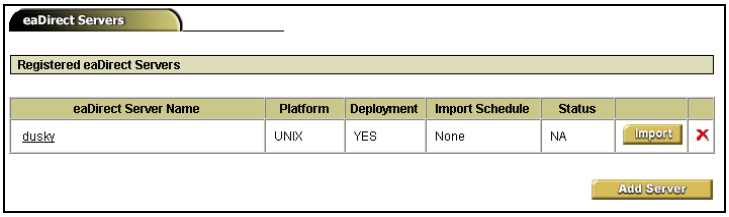

13. Click **`Save`**.

## Importing applications from an eaDirect server manually

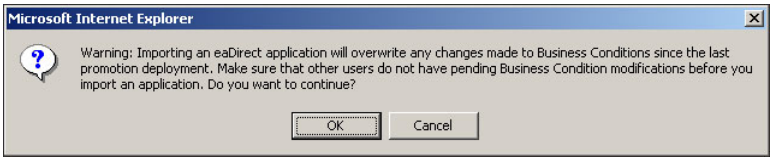
### To import (register) applications from an eaDirect server:

1. In the eaDirect Servers screen, click the

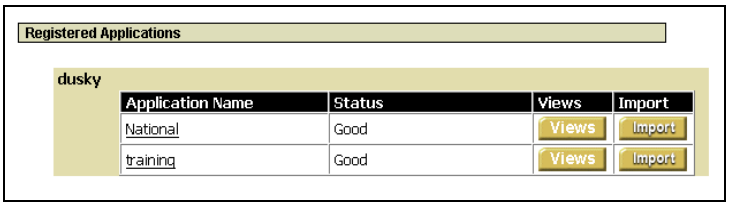
button next to the name of the server you want to import from:



eaDirect displays the following warning: “Importing an eaDirect application will overwrite any changes made to Business Conditions since the last promotion deployment. Make sure that other users do not have pending business condition modifications before you import an application. Do you want to continue?”



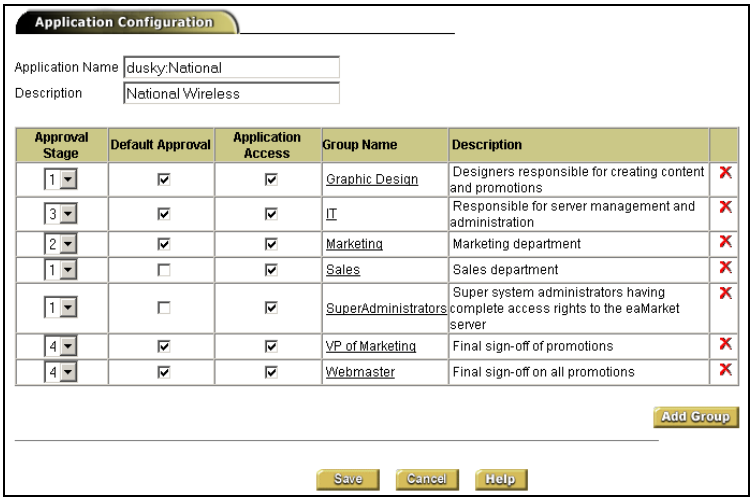

2. Click **OK** to proceed or **Cancel**. eaMarket immediately adds the names of all eaDirect applications on the selected server to the eaMarket database and lists them on the eaDirect Servers screen:




## Assigning application workflow approval

### To assign application-wide default approval groups and/or enable the promotion creator to control the workflow approval process:

1. In the eaDirect Servers screen, click the name of the application. eaMarket displays the Application Configuration screen showing the default reviewer groups and their stage in the approval process for an application’s workflow.




2. To assign a group to be a default approver, forcing all promotion creators to include this group in the workflow review process, click the **`Default Approval`** column next for the group. Or click **`Application Access`** to give the promotion creator the option to select that group as a member in the approval workflow process. Note that if a promotion creator belongs to a group that has been given the special privilege of "No approval required" eaMarket skips the approval process for the promotions created by that user.

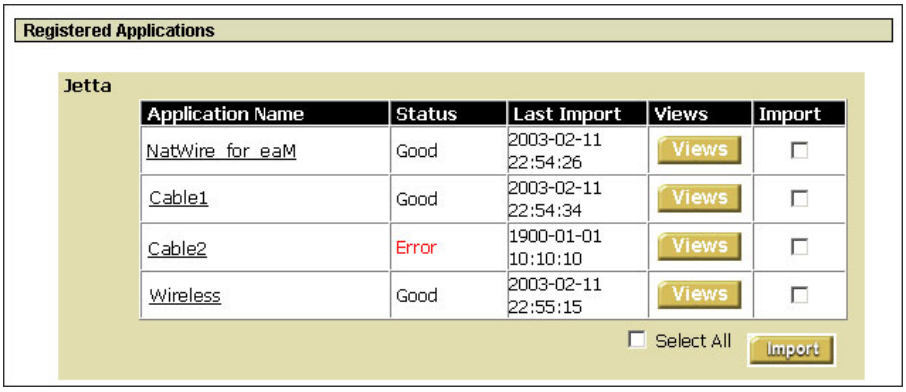
3. Click **`Save`**.

## Importing view information for an application

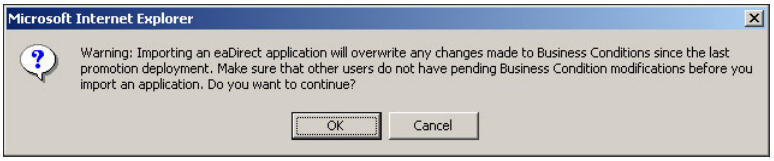
### To import view section, business condition, and template information for an application:

**Caution** Re-importing an application overwrites any previously imported business condition information. Be sure to deploy any promotions that require the current business conditions before re-importing new business conditions in an application.

1. In the eaDirect Server screen, select the application you want to import and click **`Import`**. To import all the applications select the **`Select All`** check box and click **`Import`**. (Import the application from the eaDirect server if you haven't already.)



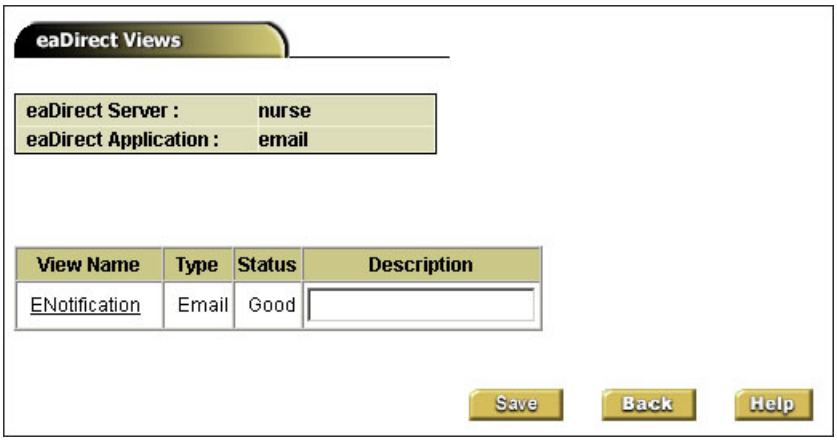

eaDirect displays the following warning: "Importing an eaDirect application will overwrite any changes made to Business Conditions since the last promotion deployment. Make sure that other users do not have pending business condition modifications before you import an application. Do you want to continue?"



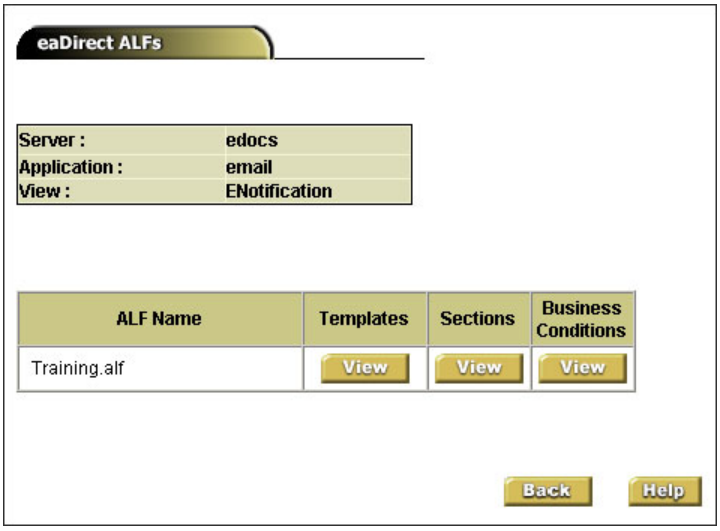

2. Click **`OK`** to proceed or **`Cancel`**. eaMarket imports information about the ALF sections and business conditions along with the associated template names to the eaMarket database.

### To display a list of views or detailed view/ALF information (sections, business conditions, and or templates) for an application:

- In the eaDirect Servers screen, click the **`Views`** button next to the name of the application, along with the type of the view (web/email) and current status:




To display information about the view's ALFs, click on the name of the view:




To list the templates, sections or business conditions defined in an ALF, click on the corresponding **`View`** button:

**eaDirect Templates**

| | |
|---|---|
| **Server :** | **dusky** |
| **Application :** | **National** |
| **View :** | **NW_LocSummary** |
| **ALF :** | **NW_LocSummary.alf** |

**HTML Templates**

| Template Name | Template File Name |
|---|---|
| Default_Template | C:\EDCSbd\samples\NatlWireless\NW_LocSummary.htm |

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**eaDirect Sections**

| | |
|---|---|
| **Server :** | **ella** |
| **Application :** | **NatlWireless** |
| **View :** | **HtmlDetail** |
| **ALF :** | **NatlWireless.alf** |

**Sections**

| Section Name | Template Name | Contents |
|---|---|---|
| TopLeftNav | Default_Template | IF Eastern THEN INSERT LDPhoneAd ELSE IF Central THEN INSERT FreePhoneCardAd ELSE IF Western THEN INSERT edocsLogo |
| HeaderMsgTxt | Default_Template | IF [FirstStmtIndicator,F] S!= NULL THEN INSERT NewCustMsg ELSE IF [LastStmtIndicator,F] S!= NULL THEN INSERT LastStmtMsg |
| BottomLeftNav | Default_Template | IF BigSpender THEN INSERT HawaiiAd |

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**eaDirect Business Conditions**

| | |
|---|---|
| **Server :** | **yumani** |
| **Application :** | **test** |
| **View :** | **HtmlDetail** |
| **ALF :** | **NatlWireless.alf** |

**Business Conditions**

| Business Condition Name |
|---|
| FirstStmtIndicator |
| LastStmtIndicator |
| CurrencyCharges |
| BigSpender |
| Eastern |
| Central |
| Western |
| NegativeRed |
| NegativefontRed |
| PTest |

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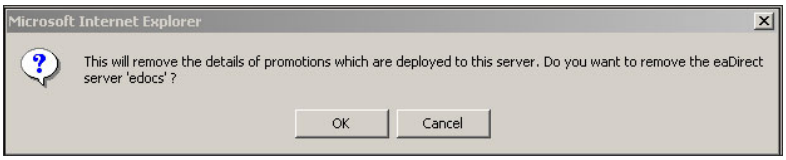
## Editing or deleting a server

### To edit a server's information:

1. In the eaDirect Servers screen, click the name of the eaDirect server you want to edit. The Edit Server screen displays the server's information.
2. Make changes, and click **Save**.

### To delete a server:

1. In the eaDirect Servers screen, click the button next to the name of the server you want to delete. eaMarket deletes the server.
2. The following message box will be displayed:




3. Click **OK**.

# Creating and Maintaining Data Stores

A data store is the location of the database where you store your eaMarket content.

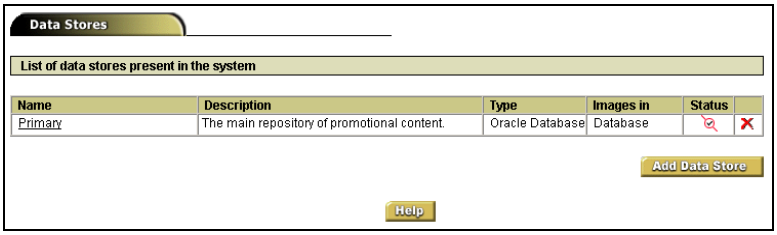
Configure your database and web application server to support data stores during installation, then create, or add, a data store in eaMarket. After creating a data store for your system, you can proceed to create one or more libraries for organizing content.

You can add, edit, and delete data stores.

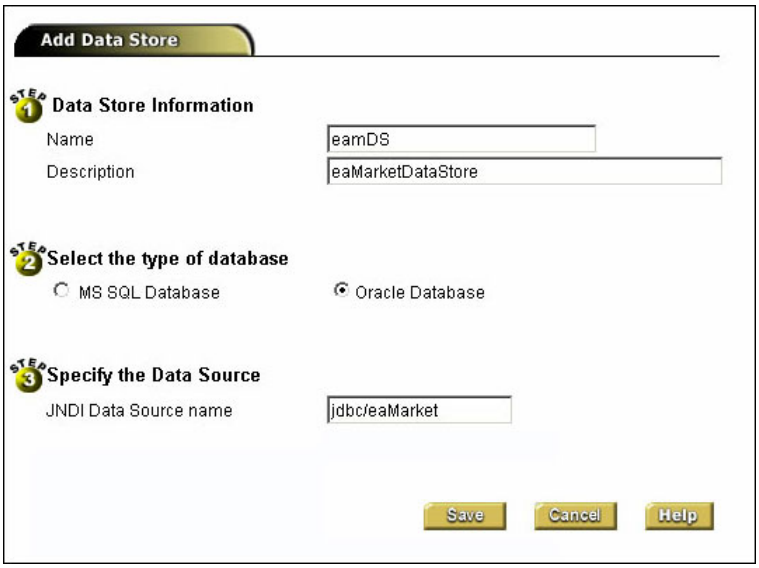
### To add a data store:

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:

2. Select **`Data Stores`**. The Data Stores screen displays a list of data stores present in the system (if any):




3. In the Data Stores screen, click **`Add Data Store`**. The Add Data Store screen appears:




4. Enter a name and description for the data store.
5. Specify the type of database the data store uses. If you haven't already added the database/table space to the database server, do so. Be sure to assign permissions to the database. (Refer to the *eaMarket Installation and Configuration Guide* for details on configuring a data store.)
6. Specify the JNDI data source. (Refer to the *eaMarket Installation and Configuration Guide* for details on configuring a data store.)
7. Click **`Save`**.

---

**Caution** If you're using MS SQL Server, you must associate data stores with a separate database from eaMarket.

---

### To delete a data store:

8. In the eaMarket Administration screen, click the **`Data Stores`** icon. The Data Stores screen displays a list of data stores present in the system (if any).

9. In the Data Stores screen, click the button next to the data store you want to delete. eaMarket removes the data store from your list.

# Creating and Maintaining Libraries

When setting up a new eaMarket system, you must create libraries to organize and store your content. A library is the framework for storing content on a data store, similar to a file system. Content is the promotional text message or graphic intended for a particular audience, view, and timeframe.

Once you create libraries for a new eaMarket system, you must populate them with your content.

Be sure to set up groups before defining libraries so that you can specify which groups can use a particular library. When defining or editing a library, you can grant individual groups the privilege to view its content. A group can see content in a library only if you grant them this privilege.

The Content option on the eaMarket menu lets users create and control categories within a library.

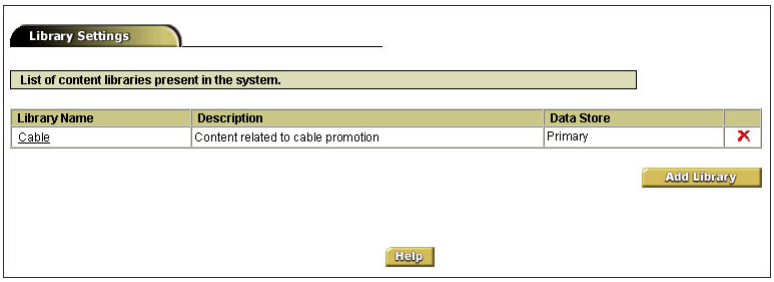
You can add, edit, or remove content libraries as needed.

### To add a library:

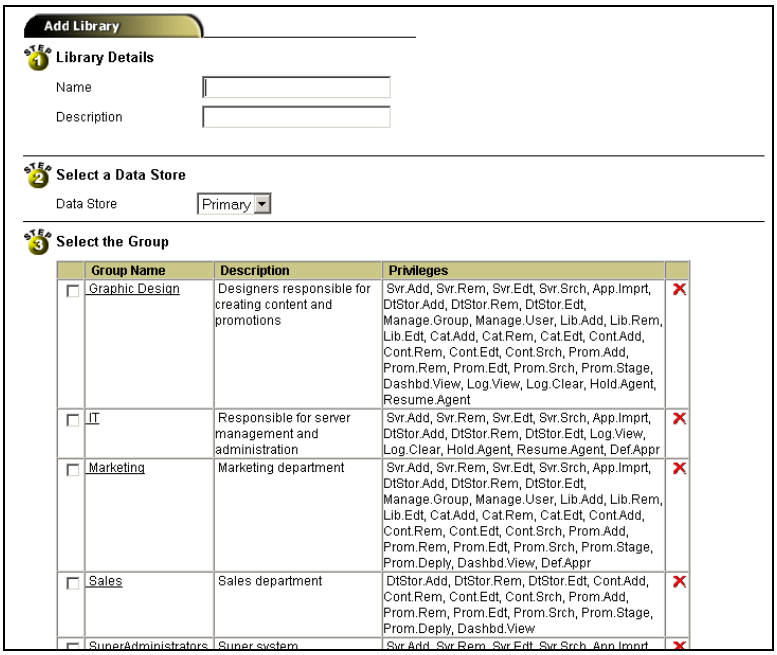
1. In the eaMarket menu, click

. The eaMarket Administration screen appears:

2. Click the **`Library Settings`** icon. The Library Settings screen displays a list of your content libraries:




3. In the Library Settings screen, click **`Add Library`** to create a new library. The Add Library screen appears:




4. Under Library Details, type the library name and description.
5. Select a data store from the drop down menu.
6. In the Select the Group region, select the user groups you want to grant access to the library.
7. Click **`Save`** or **`Add Group`** to add a new group.

### To edit a library:

1. In the eaMarket Administration screen, click the **`Library Settings`** icon. The Library Settings screen displays a list of your content libraries.
2. In the Library Settings screen, click the name of the library you want to edit. The Edit Library screen appears.
3. Edit the information for the selected library.
4. Click **`Save`** or click **`Add Group`** to add a group.

### To delete a library:

1. In the eaMarket Administration screen, click the **`Library Settings`** icon. The Library Settings screen displays a list of your content libraries.

2. In the Library Settings screen, click the button next to the name of the library you want to remove. eaMarket removes the library from your list.

# Setting System Preferences

To set up a new eaMarket system, you must specify your eaMarket system configuration preferences to control how eaMarket works system-wide. Only your most secure group should have privileges to change preferences; most groups should not be able to change system preferences.

If you are using WebLogic, changing configuration parameters requires you to restart WebLogic since the eaMarket agents will be running within a separate JVM. If you are using WebSphere, changing configuration parameters requires you to restart the eaMarket server. You must also restart the eaMarket agents to implement configuration changes.

You can set up preferences for the following system information:

- Servers
- Agents
- Content preview
- Main database
- Internationalization
- Servlets
- Tracker
- Web interface

- Event log
- Email

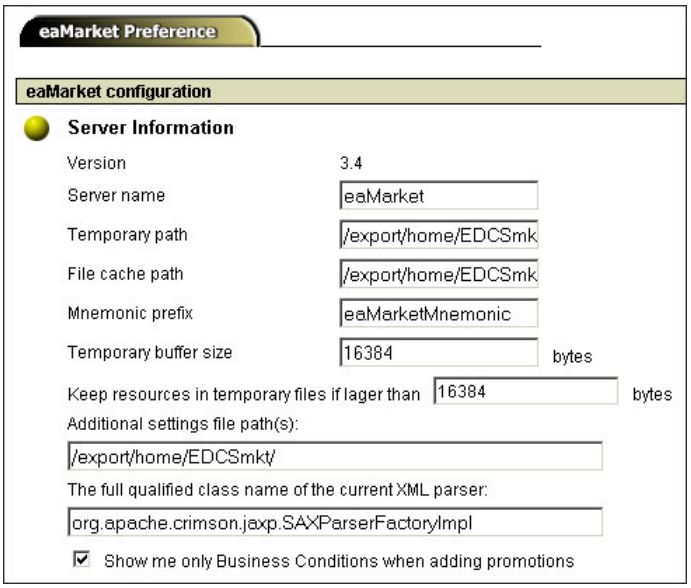
### To specify or edit your eaMarket configuration (preferences):

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:

2. Select **Preferences**. The Configuration screen appears.
3. Specify the necessary configuration preferences, described below. To clear all the changes you made before saving, click **Reset to Defaults**.
4. When you have finished changing configuration preferences, click **Save**.

## Server Information

You can edit your eaMarket server name, paths, temporary buffer size, and other information, described below, under the "Server Information" region on the eaMarket Configuration screen. See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.




**Server name** – Name of the eaDirect server.

**Temporary path** – The pathname used to store temporary files generated by eaMarket.

**File cache path** – The pathname used for cached files.

**Mnemonic prefix** – This string is inserted in the ALF file to indicate that an eaDirect condition's action is controlled by eaMarket. For example, in ALFs modified in eaMarket, you can see statements similar to "If BigSpender == TRUE then eaMarketMnemonic_12_1" which corresponds to content specified by eaMarket. Change only with caution.

**Temporary buffer size** – Buffer Size when using buffered I/O. Change only with caution.

**Keep resources in temporary files if larger than** – Any resources (files, etc.) smaller than the size specified are kept in memory; large resources are written to files. Change only with caution.

**Additional settings file paths** – See the *eaMarket Installation and Configuration Guide* for configuration information.

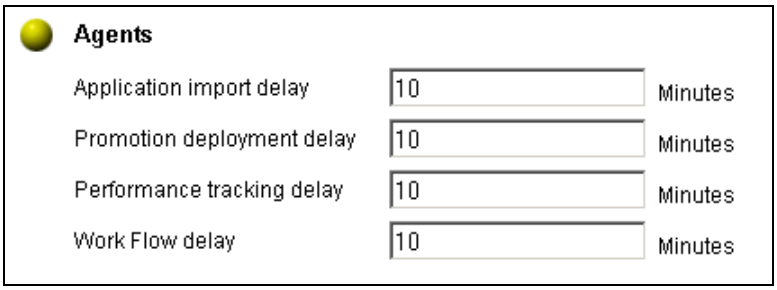
**The full qualified class name of the current XML parser** – Do not modify. This is the Apache SAX parser factory class, a development option that makes it easier to test various parsers.

**Import business conditions and sections which are named from the eaDirect applications** – If you select this option, eaMarket shows only business conditions and hides conditions when you are adding promotions.

## Agents

You can specify the delays eaMarket uses before running the Application Import, Promotion Deployment, and Work Flow agents in the Agents region of the eaMarket Configuration screen.

A delay determines how long the agents poll to complete these tasks. Smaller numbers make the tasks complete faster but require more total computing time. The default, 10 minutes, works reasonably well.

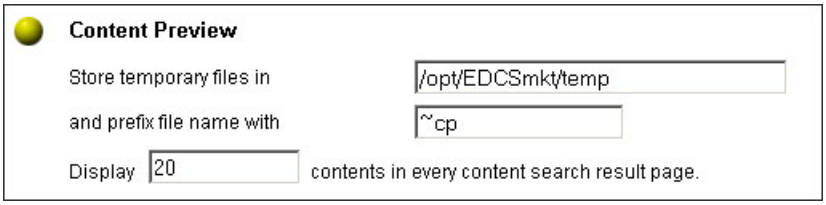



Do not modify the Performance tracking delay.

## Content Preview

You can specify parameters for previewing content, including where to store the temporary files previewing generates, a prefix for the file name, and the number of content items to display in each search result page in the Contents Preview region of the eaMarket Configuration screen.

See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.




**Store temporary files in** – The temporary content file cache path.

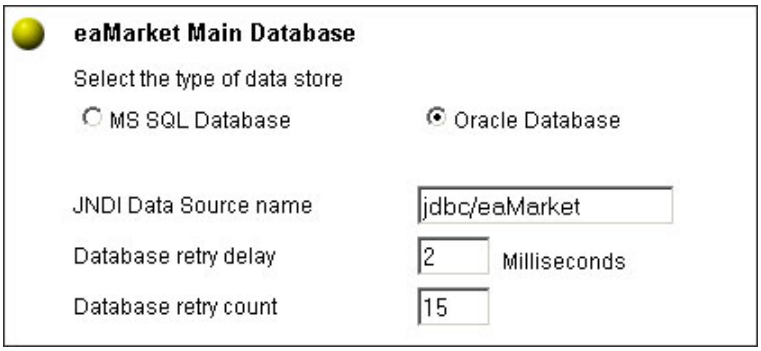
**Prefix file name with** – Temporary content file extension.

**Display (x) contents in every content search result page** – The number of contents to be shown in a single web page when searching. Change only with caution.

## eaMarket Main Database

Specify settings to use for the main eaMarket database in the eaMarket Main Database region of the Configuration screen.

See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.




**Data store name** – Do not modify this field.

**Select the type of data store** – See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.

**JNDI Data Source name** – JNDI name of the eaMarket data source.

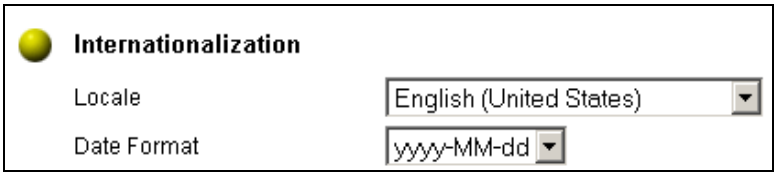
**Database retry delay** – Retry to connect to the database after this amount of time on error. Change only with caution.

**Database retry count** – The maximum number of retry attempts before throwing an exception. Change only with caution.

## Internationalization

You can change the date format you use with eaMarket in the Internationalization region of the eaMarket Configuration screen.

Do not modify the Locale; only U.S. English is supported for this release.

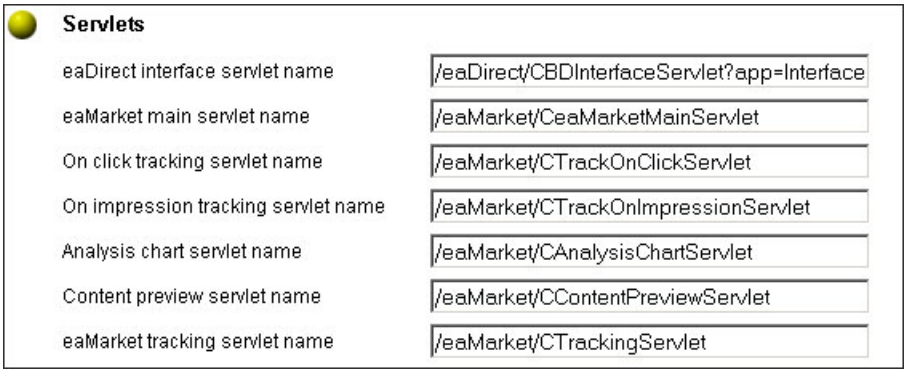



1. Click on the drop down arrow to select a locale:

2. Select a date format from the drop-down list:

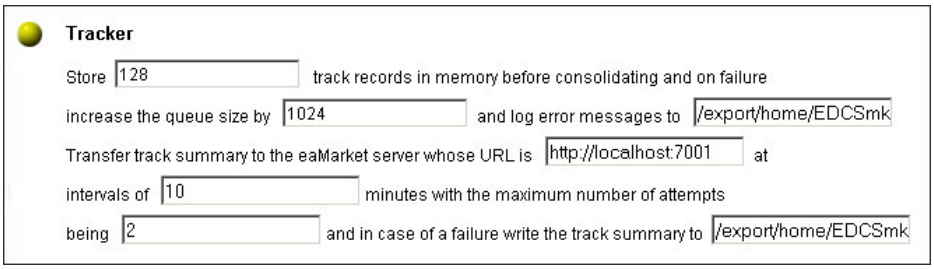
## Servlets

The Servlet region of the configuration screen is primarily for development, QA and troubleshooting purposes. You do not need to edit these values.



## Tracker

You can specify preferences to use for tracking, including number of track records to store, where to store them, queue size and where to log errors in the Tracker region of the Configuration screen:




**Store (x) track records in memory before consolidating** – Track the specified number of click/impression records to keep in the memory buffer. Change only with caution.

**on failure increase the queue size by** – Increase the in-memory tracking information store by this amount if necessary. Change only with caution.

**log messages to** – Name of the error log for tracking. Change only with caution.

**Transfer track summary to the eaMarket server whose URL is** – Name of the eaMarket server URL to send tracking information. Change only with caution. See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.

**at intervals of (x) minutes** – Delay after which tracking information is periodically sent. Change only with caution.

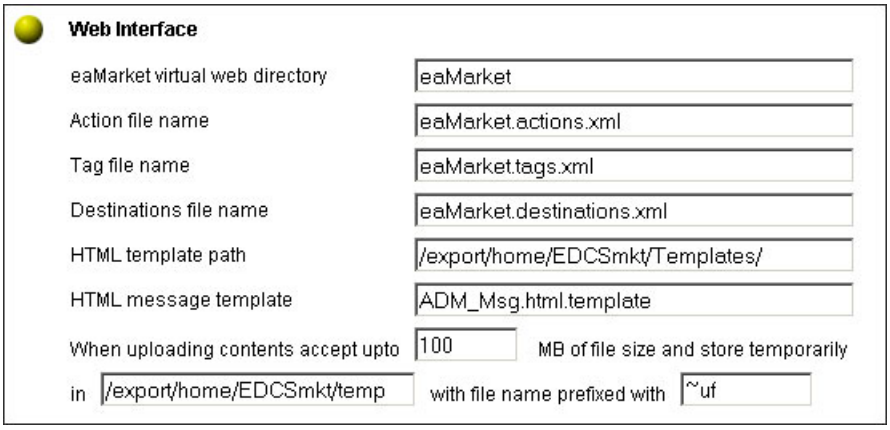
**maximum number of attempts** – The maximum number of attempts to retry on failures. Change only with caution.

**in case of a failure write the track summary to** – Name of local file to send back tracking information on failure.

## Web Interface

To use the eaMarket virtual web directory, you must specify the Action, Tag and Destinations file names, HTML template path, HTML message template and content upload information in the Web Interface region of the Configuration screen.

See the *eaMarket Installation and Configuration Guide* for more information about configuring eaMarket.




**eaMarket virtual web directory** – Do not modify.

**Action file name** – Do not modify.

**Tag file name** – Do not modify.

**Destinations file name** – Do not modify.

**HTML template path** – Template file path.

**HTML message template** – Do not modify.

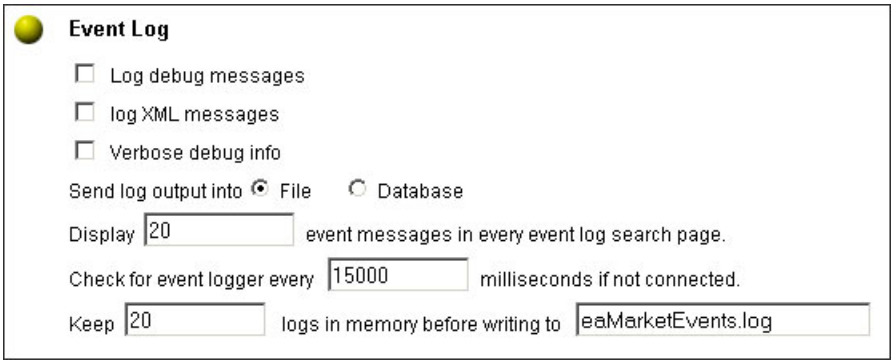
**When uploading contents accept up to (x) MB of file size** – The maximum content upload size. Change only with caution.

**Store temporarily in** – Temporary folder for uploaded content.

**with file name prefixed with** – The name of the extension for uploaded contents. Change only with caution.

## Event Log

You can specify which messages appear in the logs, whether to store log messages in a separate file or in the eaMarket database, and additional log information and criteria in the Event Log region of the Configuration screen:




**Log debug messages** – Enables logging of eaMarket debug messages; this debugs all trace level messages. Change only with caution.

**Log XML messages** – Enables logging of *complete* XML messages. Change only with caution.

**Verbose debug info** – Shows verbose debug messages in agents log files. Change only with caution.

**Send log output into file or database** – Specifies where to send log event information. Be cautious if changing to database; this can fill up the database tables if log entries are not cleared periodically.

**Display (x) event messages in every event log search page** – Specifies the number of log entries to show in a single web page. Change only with caution.

**Check for event logger every (x) milliseconds if not connected** – The connect time to try for the event logger. Do not change.

**Keep (x) logs in memory** – The number of log entries to keep in memory (buffered). Change only with caution.

**before writing to** – The name of the Event Log file. Change only with caution.

## Email

Specify standard SMTP (Simple Mail Transfer Protocol) values to connect to your company's email distribution server if you intend to email promotions internally for approval.

**Mail server name** – The name of your SMTP mail server name or IP address (modifiable).

**Port number** – The port number to use to connect to the email server (modifiable).

**User ID, Password** – User ID and password if your email server requires authentication to connect to the SMTP server (modifiable).

**Reply address** – The email reply address (modifiable).

**Administrator address** – The email address of the eaMarket system administrator (modifiable)

**Retry interval** – Email retry interval on failures. Change only with caution.

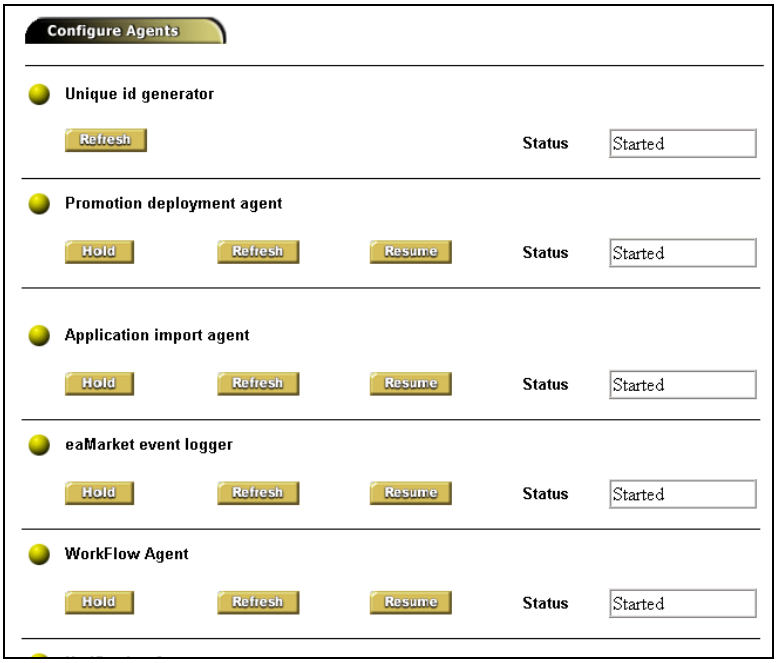
**Number of Retries** – Number of times to retry sending an email message. Change only with caution.

### To configure agents:

You can change an agent's configuration to put a hold on, stop, or resume any of the following agents:

- Application import agent
- Promotion deployment agent
- Unique ID generator
- eaMarket event logger
- Workflow agent
- Notification agent

1. Click the **`Configure Agents`** button on the Preferences screen. The Configure Agents screen appears:



2. Click the appropriate button to hold, refresh, or resume the agent. The status changes.

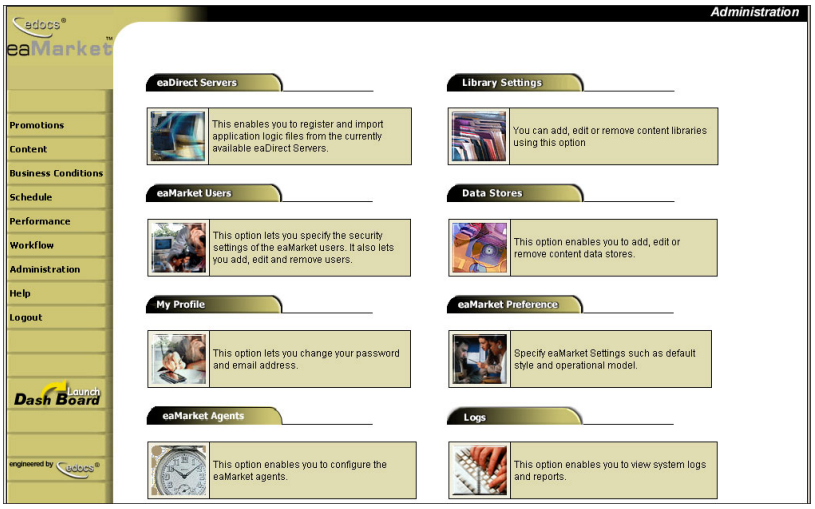
3. Click **`Back`** to return to the Configuration screen.

# Changing Your Profile Information

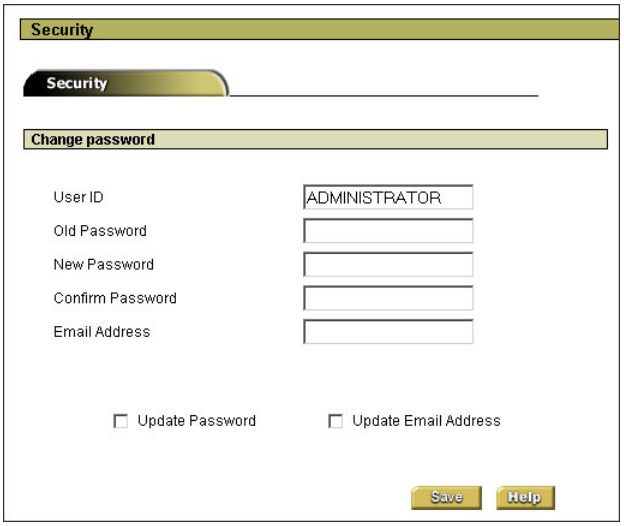
The My Profile Administration option lets you change your eaMarket password or email address.

### To change your password or email address (profile):

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:




2. Select **`My Profile`**. The Security screen appears:




3. To change the password, type your old password in the "Old Password" field, enter the new password in the "New Password" field, and reenter the new password in the "Confirm Password" field.

4. To change the email address, enter the new email address in the "Email Address" field.

5. Depending on what you changed, select the **`Update Password`** check box or the **`Update Email Address`** checkbox. If you changed both, select both check boxes.

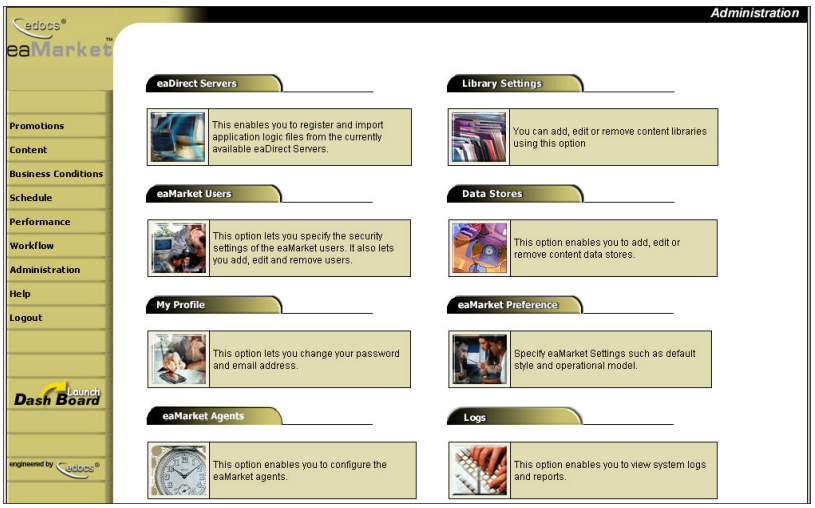
6. Click **`Save`**.

# Viewing Logs

You can view system logs to help troubleshoot failures in eaMarket. You can create a filtered log showing messages generated by one or more event types (error, debug, event, warning, or SQL debug) over a selected time period for one or more eaMarket application modules.

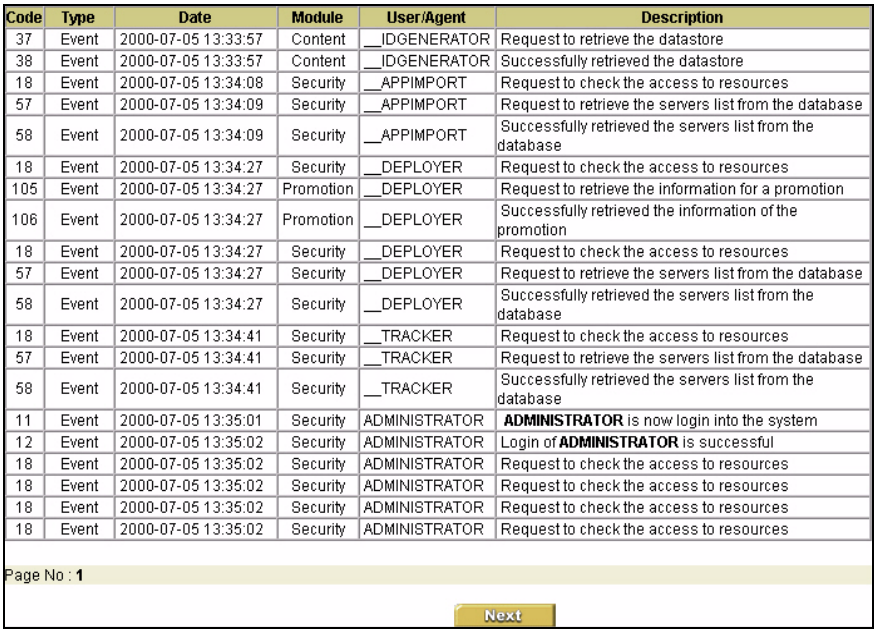
### To create an eaMarket log:

1. On the eaMarket menu, click **Administration**. The eaMarket Administration screen appears:




2. Select **Logs**. The eaMarket Log screen appears:

3. Select your criteria and click **`Search`** to execute the query. (Clicking the **`Clear`** button removes log entries within the period specified. It is good practice to clear eaMarket log events regularly.) eaMarket displays your query results:



| Code | Type | Date | Module | User/Agent | Description |
|---|---|---|---|---|---|
| 37 | Event | 2000-07-05 13:33:57 | Content | __IDGENERATOR | Request to retrieve the datastore |
| 38 | Event | 2000-07-05 13:33:57 | Content | __IDGENERATOR | Successfully retrieved the datastore |
| 18 | Event | 2000-07-05 13:34:08 | Security | __APPIMPORT | Request to check the access to resources |
| 57 | Event | 2000-07-05 13:34:09 | Security | __APPIMPORT | Request to retrieve the servers list from the database |
| 58 | Event | 2000-07-05 13:34:09 | Security | __APPIMPORT | Successfully retrieved the servers list from the database |
| 18 | Event | 2000-07-05 13:34:27 | Security | __DEPLOYER | Request to check the access to resources |
| 105 | Event | 2000-07-05 13:34:27 | Promotion | __DEPLOYER | Request to retrieve the information for a promotion |
| 106 | Event | 2000-07-05 13:34:27 | Promotion | __DEPLOYER | Successfully retrieved the information of the promotion |
| 18 | Event | 2000-07-05 13:34:27 | Security | __DEPLOYER | Request to check the access to resources |
| 57 | Event | 2000-07-05 13:34:27 | Security | __DEPLOYER | Request to retrieve the servers list from the database |
| 58 | Event | 2000-07-05 13:34:27 | Security | __DEPLOYER | Successfully retrieved the servers list from the database |
| 18 | Event | 2000-07-05 13:34:41 | Security | __TRACKER | Request to check the access to resources |
| 57 | Event | 2000-07-05 13:34:41 | Security | __TRACKER | Request to retrieve the servers list from the database |
| 58 | Event | 2000-07-05 13:34:41 | Security | __TRACKER | Successfully retrieved the servers list from the database |
| 11 | Event | 2000-07-05 13:35:01 | Security | ADMINISTRATOR | **ADMINISTRATOR** is now login into the system |
| 12 | Event | 2000-07-05 13:35:02 | Security | ADMINISTRATOR | Login of **ADMINISTRATOR** is successful |
| 18 | Event | 2000-07-05 13:35:02 | Security | ADMINISTRATOR | Request to check the access to resources |
| 18 | Event | 2000-07-05 13:35:02 | Security | ADMINISTRATOR | Request to check the access to resources |
| 18 | Event | 2000-07-05 13:35:02 | Security | ADMINISTRATOR | Request to check the access to resources |
| 18 | Event | 2000-07-05 13:35:02 | Security | ADMINISTRATOR | Request to check the access to resources |

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