



Client Installation Guide

Version 6.0 SP1



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You can also download other Portrait Software documentation from the site. If you don't have a username and password—or you've forgotten them—please contact us through one of the channels below.

If you find a problem with the use, installation, or documentation of this product, please contact us using any of the following methods:

Email: support@portraitsoftware.com

Phone

- USA/Canada 1-800-335-3860 (toll-free)
- Rest of world +44 800 840 0001

When you report a problem, it helps if you can tell us:

- The name of the software application
- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

Pitney Bowes Software Inc.

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Introduction

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Purpose

This document describes how to install Portrait Dialogue client software, including:

- Visual Dialogue
- Dialogue Admin

Intended audience

This guide is intended for users who need to install Portrait Dialogue client software.

Related documentation

Document	Installation media (zip/dvd/iso) and location
<ul style="list-style-type: none">• Portrait Dialogue 6.0 SP1 Release Notes	<ul style="list-style-type: none">• Portrait Dialogue media in: \Documentation\<i><language_code></i>\
<ul style="list-style-type: none">• Portrait Dialogue Server Installation Guide	<ul style="list-style-type: none">• Portrait Dialogue media in: \Documentation\<i><language_code></i>\

Tip: All documents are also available on Portrait Software's support website: <http://support.portrait-software.com>

Product overview

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Portrait Dialogue

Portrait Dialogue helps you convert customer interactions into a connected two-way dialogue for greater customer engagement. Portrait Dialogue is designed to support business and marketing processes across multiple communication and delivery channels.

Portrait Dialogue can be integrated with existing applications and technologies linking real-time communication information with your front and back office applications. This enables you to build strong relationships with your customers based on information from all sources in your company.

Key components

Visual Dialogue

Visual Dialogue forms part of the Portrait Dialogue suite of products, which support Customer Relationship Management.

Visual Dialogue application provides you with an intuitive work environment that makes it easy to graphically plan your customer communication process and execute all phases in it. For example, you might use Visual Dialogue to:

- welcome new customers, query them about their communication preferences, and send them an offer via their preferred communication medium
- handle complaints, ensuring that all first-time complainers receive a phone call, while chronic complainers receive responses based on their profitability
- distribute a customer satisfaction survey, evaluate the responses, place customers in different groups according to their responses, and then send appropriate communication or take appropriate actions about each group.

Dialogue Admin

Dialogue Admin is the Portrait Dialogue administration client application. You can configure:

- Dialogue server hosts
- Database instances
- Customer domains
- Dialogue types
- Marketing channel types
- Message types

Portrait Shared Server

Portrait Shared Server consists of five key components:

- **Portrait Shared Services (PSS)**. Provides the set of web services that allow Portrait Suite applications (Portrait Explorer, Miner, Dialogue and Interaction Optimizer) to communicate with each other.
- **Portrait Shared Repository (PSR)**. Provides the Portrait Shared Repository and Portrait Data Warehouse databases.
- **SharePoint Tasks (Optional)**. Provides an integrated task management solution where tasks assigned to individuals in Portrait HQ are displayed in SharePoint for greater visibility. **Note:** SharePoint Tasks is optional for Portrait Dialogue and Portrait Interaction Optimizer, and not required for Portrait Explorer.
- **Portrait Reports (Optional)**. Provides a set of pre-built reports on the operational performance of Portrait Interaction Optimizer and Portrait Dialogue. **Note:** Portrait Reports is optional for Portrait Dialogue and Portrait Interaction Optimizer, and not required for Portrait Explorer.
- **Portrait HQ**. Provides a central dashboard for planning, launching and monitoring large scale (1 to 1) marketing campaigns. In addition to providing live (up-to-the-minute) summary views of your overall marketing position, Portrait HQ also provides real-time data enabling you to evaluate campaign progress and take immediate action if required.

Installing Portrait Dialogue client software

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Installation overview

To install Portrait Dialogue client software, complete the procedures listed below.

Installation procedure	Time estimate
Installing Portrait Dialogue client software on page 13	10m
Verifying the installation on page 13	5m
Configuring the Dialogue Admin instance on page 14	5m
Setting up automatic login (optional) on page 15	5m

Installation pre-requisites

The Portrait Dialogue client installation procedures assume the following software has been installed.

Software	Software level
Microsoft Windows	Windows 7 SP1 (32 or 64-bit) or Windows 8
Microsoft Internet Explorer	Version 9 or 10

Portrait Software - suite compatibility

Portrait Dialogue is compatible with the following Portrait Software.

Software	Software level
Portrait Foundation	4.4 Update 4
Portrait Miner	7.0A
Interaction Optimizer	5.5
Portrait Explorer	4.0
PSS	2.0 SP1

Before you begin

Before you start the installation process, ensure:

- You know the name of the Dialogue server to connect to
- You have obtained a Portrait Dialogue username and password
- That if you are using Windows authentication, make sure that your user account is set up to use Windows authentication in Portrait Dialogue
- Your System Administrator has set up your user account to access the Dialogue server via COM+

Installation procedures

Installing Portrait Dialogue client software

Installing the Portrait Dialogue client software includes installing two key components:

- Visual Dialogue
- Dialogue Admin

Note: If you want to run an unattended installation, see *Running an unattended installation* in the Appendix.

1. To start the installation, run the `InstallMenu.exe` found on the Portrait Dialogue media.
2. Click **Install Visual Dialogue**. The **Welcome** dialog box will appear, click **Next** to continue.
3. Choose the destination folder for the program files. Click **Next** to continue.
4. Choose to install **Visual Dialogue, Dialogue Admin and samples (Complete)**, or only selected components (Custom). Click **Next** to continue.
5. Enter the name of the Dialogue Server to connect to and the instance name. If you do not know the instance name enter `default`. Click **Next** to continue.
6. Click **Install** to start the installation.

Verifying the installation

1. Click on the **Visual Dialogue** shortcut to start Visual Dialogue for the first time.

Note: The installation creates shortcuts to the Visual Dialogue on your desktop. Shortcuts are also available under **Start > Program Files > PST > Portrait Dialogue**

2. Log in to Visual Dialogue.

- If using Portrait Dialogue authentication, enter your Portrait Dialogue username and password, and click **OK**.
- If using Windows authentication, check the box **Use Windows Authentication**, and click **OK**.

Note: You can click on the **Advanced** button and update the Dialogue Server Host and Instance name if your server details have changed.

3. If everything is set up correctly and your username has the necessary user rights, Visual Dialogue will start. If you have problems accessing the Dialogue Server, typical error messages include:

Error message	Description
Error occurred when trying to connect to 'MHDIALOGSERVER.MHSystemAPI@DIALOGSERVER' : The RPC server is unavailable.	This error typically occurs if your computer is not able to communicate using COM+ and RPC to the Dialogue Server. Check the following: <ul style="list-style-type: none">• That the Dialogue Server Host name is correct• That there are no firewalls preventing your computer communicating using COM+ and RPC with the Dialogue Server Host server.
Error occurred when trying to connect to 'MHDIALOGSERVER.MHSystemAPI@DIALOGSERVER' : Access is denied.	This error typically occurs when your computer is able to communicate with the Dialogue Server, but your windows user account is not allowed access to the Dialogue Server COM+ components. Check the following: <ul style="list-style-type: none">• That your user account is allowed “Distributed COM Access” to the Dialogue Server. Contact your network administrator to verify this.• The Dialogue Server has a local group called “Distributed COM Users” make sure that your windows account is added to this group directly or via other domain group’s memberships.

Important: If your computer is not on the same domain as the Dialogue Server, you will require a number of additional steps to connect to the Dialogue Server. Contact your Domain or Network Administrators and send them the *MTS and DCOM setup.pdf* document provided on the installation media (zip/dvd/iso).

Configuring the Dialogue Admin instance

If you install the Dialogue Admin client, you need to add the Dialogue Server to the Dialogue Server Hosts node.

To add the Dialogue Server:

1. Open the **Dialogue Admin** window:
2. Right-click on **Dialogue Server Hosts** and select **New**.
3. Type in the computer name of the Dialogue Server.
4. Click **OK**.

Note: To delete an invalid host in the **Dialogue Admin** window, select the **Dialogue Server Hosts** node, then select the host in the right view and click **Delete**.

Setting up automatic login (optional)

Use the following procedure to set up automatic login for Visual Dialogue and Dialogue Admin.

1. Right-click the desktop shortcut for Visual Dialogue (and/or Dialogue Admin) and select **Properties**.
2. In the **Target** field use the parameters below to set up automated login.

Parameters supported

```
-host=<host>  
-instance=<instance>  
-username=<username>  
-password=<password>  
-winauth
```

For example

```
C:\MH\MHVisualDialog.exe -host=vmdev-app01 -instance=default -winauth
```

This will automatically log you in on the `vmdev-app01` Dialogue Server using Windows authentication. You can alternatively specify your own username and password information.

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Running an unattended installation

To run unattended installation use the MSI package available on the install CD under <CD root>\Msi\Portrait Visual Dialogue.msi

```
Command: msiexec /i <path to client installation msi> /passive  
MH_SERVER_NAME=<name of app server>  
MH_INSTANCE_NAME=<name of instance>.
```

The server and instance name are used in the shortcut to VD. For debugging and error finding purposes, the options /log <name of log file> should be added.