



# Server Installation Guide

Version 6.2



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- 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.**

April 13, 2018

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# Introduction

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## Purpose

This document describes how to install Portrait Dialogue 6.2 (server components).

For information on how to install Portrait Dialogue's client software, see the *Portrait Dialogue Client Installation Guide*.

## Intended audience

This guide is intended for System Administrators who need to install Portrait Dialogue. This document assumes familiarity with administration of target install systems, as well as appropriate levels of access to those systems.

## Related documentation

Document	Media (zip/dvd) and location
Portrait Dialogue 6.2 Release Notes	Portrait Dialogue media in: \Documentation\ <i>&lt;language_code&gt;</i> \
Portrait Dialogue MTS and DCOM setup	Portrait Dialogue media in: \Documentation\en-us\
Portrait Dialogue Client Installation Guide	Portrait Dialogue media in: \Documentation\ <i>&lt;language_code&gt;</i> \

**Note:** These documents and others can be downloaded from the Pitney Bowes Software website: <http://www.pbinsight.com/support/product-documentation/p/>



# 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

### Dialogue Server

The Dialogue Server is the core component of the Portrait Dialogue product suite and ensures correct customer process behavior. The Dialogue Server sends information to the customers (through mail, e-mail or SMS), handles customer responses (e.g. questionnaires), notifies the customer service representatives when different events occur, generates reports etc. All this happens automatically, either controlled by time or by events in the system, but it can also be controlled manually if required.

### Dialogue Web Server

- Used to host external web applications
- Uses MS IIS Technology
- Portrait Dialogue applications are based on .Net Framework 4.6.2
- Normally installed in the DMZ for security reasons
- Scaled according to traffic
- Communicates with Application Server via Web Services

### SQL Server or Oracle database

Portrait Dialogue uses a SQL Server or Oracle database to store its configuration, as well as cache data used to inform the business rules that Portrait Dialogue evaluates.

### Portrait Shared Server

Portrait Shared Server consists of three 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.

- **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.

## Optional components

Portrait Dialogue can optionally be integrated with other Portrait Software products, including Interaction Optimizer, Portrait Explorer and Portrait Miner.

**Note:** This installation part of this guide takes you through installing Portrait Dialogue as a standalone application. If you want to install or integrate Portrait Dialogue with other Portrait Software applications, see the *Portrait Suite Installation Guide*.

### Interaction Optimizer

Portrait Interaction Optimizer (IO) works with your existing customer applications to help convert inbound customer interactions into revenue opportunities.

Interaction Optimizer helps provide targeted (1-to-1) sales, service and retention offers for individual customers, at a specific moment of interaction, on any channel, for example web, inbound call, and email. Interaction Optimizer offers intelligent point of customer interaction by leveraging an organization's data in real-time to ensure the customer receives the right offer at the right time.

Portrait Interaction Optimizer enables customer data to be connected across different business units and channels without duplication. Multiple customer channels (via marketing campaigns) can be managed from a single view using Interaction Optimizer's HQ dashboard. Marketing campaigns can be added or changed 'on the fly' for immediate impact, and a simulation capability allows marketers to perform rapid 'what if' analysis to determine the right campaign mix – before placing into production.

### Portrait Miner

Portrait Miner is a powerful predictive analytics solution that enables customer insight professionals and business users alike to achieve a clear picture of their customers for the purpose of greater understanding and prediction of future behavior. Portrait Miner can be used to predict profit-impacting behaviors and propensities, including customer churn, cross sell and up sell opportunities, campaign planning and segmentation, customer satisfaction and loyalty, and customer lifetime value.

Portrait Dialogue (PD) uses Portrait Miner's analytic rule repository to hold analytic rules used to score PD recommendations.

### Portrait Explorer

Portrait Explorer is an easy-to-use, browser-based, customer data exploration tool. It allows business users to access their customer data quickly and easily without the need for advanced analytical or statistical help.

Portrait Explorer allows business users to:

## Microsoft SharePoint

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- search for customers or groups of customers across an enterprise
- drill down on individual customers to confirm their personal details and data
- use key selection criteria (age, sex, income) to expose customers and groups of customers for potential review or campaign actions.

## Microsoft SharePoint

Microsoft SharePoint is a highly scalable web application that helps manage company content. It is typically used to store company documents such as Word and Excel documents but can also be extended to offer alternative functionality such as wiki and collaboration spaces.

Portrait Dialogue and Portrait HQ use SharePoint to help manage tasks related to a marketing campaign. During the planning phase you can assign tasks to individuals and then display them in SharePoint for greater visibility. Using SharePoint also enables task recipients to display their tasks in Microsoft Outlook.

# Installation overview

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## Installation overview

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

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<a href="#">Setting up your server environment</a> on page 19	20m
<a href="#">Installing the Dialogue Database</a> on page 23	10m
<a href="#">Installing the Dialogue Server</a> on page 27	15m
<a href="#">Installing Dialogue Web Applications</a> on page 31	20m
<a href="#">Installing Portrait Shared Server</a> on page 41	30m
<a href="#">Configuring Portrait Dialogue</a> on page 63	15m

## Installation pre-requisites

### Servers

Server	Software / Config	Software level
All servers	MS Windows Server	<p>Portrait Dialogue can be installed on <b>any</b> of the following:</p> <ul style="list-style-type: none"> <li>Standard and Datacenter Editions of Windows Server 2012 (only available in 64-bit version)</li> <li>IIS 8.0 (configured with IIS 6.0 compatibility mode)</li> <li>Standard and Datacenter Editions of Windows Server 2012 R2 (only available in 64-bit version)</li> <li>IIS 8.5 (configured with IIS 6.0 compatibility mode)</li> </ul>
All servers	Various	<ul style="list-style-type: none"> <li>Microsoft .Net Framework v3.5</li> <li>Microsoft .Net Framework v4.6.2</li> <li>All server names should be no longer than 15 characters, or even shorter for languages that require more than one byte storage for each character. For more information, see <a href="http://technet.microsoft.com/en-us/library/cc731383.aspx">http://technet.microsoft.com/en-us/library/cc731383.aspx</a>.</li> </ul>

Server	Software / Config	Software level
Application servers	Various	<ul style="list-style-type: none"> <li>• MS SQL Server feature: Client Tools Connectivity</li> <li>• SQL Server Native Client (version 11 or later).</li> <li>• Oracle native 32-bit client drivers if you are using an Oracle database, including <ul style="list-style-type: none"> <li>• Oracle Provider for OLE DB</li> <li>• Oracle Services for Microsoft Transaction Server</li> </ul> </li> <li>• Support for distributed transactions (Distributed COM and Network DTC)</li> </ul>
Database servers	SQL Server and Oracle	<p><b>SQL Server</b></p> <ul style="list-style-type: none"> <li>• Support for distributed transactions (Distributed COM and Network DTC)</li> <li>• 2017 Enterprise and Standard Editions (64-bit version) with either case-sensitive or case-insensitive server collations.</li> <li>• 2016 SP1 Enterprise and Standard Editions (64-bit version) with either case-sensitive or case-insensitive server collations.</li> <li>• <b>Note:</b> The following SQL Server features must be installed: <ul style="list-style-type: none"> <li>• Database Engine Services</li> <li>• Management Tools - Basic</li> <li>• Management Tools - Complete</li> <li>• Client Tools Connectivity</li> <li>• SQL Server feature: Integration Services</li> <li>• SQL Server feature: Reporting Services (optional)</li> </ul> </li> </ul> <p><b>Oracle</b></p> <p>11i R2 or 12c R1 <b>Note:</b> The following restrictions:</p> <ul style="list-style-type: none"> <li>• For full Oracle Unicode support, the Oracle database must be set up with Unicode character set. We recommend NLS_NCHAR_CHARACTERSET=AL16UTF16 and NLS_CHARACTERSET=AL32UTF8.</li> <li>• If you don't plan to use full Unicode support, you can have a non Unicode character set for NLS_CHARACTERSET, for example WE8ISO8859P1. The character set you use must support the « and » characters. This means for instance US7ASCII cannot be used.</li> <li>• If you are using an Oracle database, then Oracle native 32-bit client drivers must be installed.</li> </ul>

Server	Software / Config	Software level
		<ul style="list-style-type: none"> <li>If running Portrait HQ in a 64-bit environment and Portrait Dialogue is using an Oracle database, Oracle native 64-bit client drivers must be installed on the Portrait HQ database servers.</li> </ul> <p><b>Note:</b> Portrait Dialogue customer databases can be either Oracle or SQL Server, however Portrait HQ along with other Portrait Suite products require SQL Server 2012 or 2014.</p> <p><b>Note:</b> If the database and application server reside on different domains or have firewalls between them, see <b>MTS and DCOM set up</b> in the Appendix.</p>
SharePoint servers	MS SharePoint (Optional)	<ul style="list-style-type: none"> <li>SharePoint Server 2013</li> <li>SharePoint Foundation 2013</li> </ul>
Portrait Dialogue servers	Operating system	<ul style="list-style-type: none"> <li>The Portrait Dialogue server runs as a 32-bit application on either 32 or 64-bit operating systems.</li> <li>If running on a 64-bit system, IIS must be set in 32 bit mode.</li> <li>The IIS application pool used by Portrait Dialogue web applications must be ASP.NET v4.0 Classic.</li> <li>Web applications use SOAP to communicate with the web services on the application server. Port 80 is used by default. Communication port can be changed in the web.config file for each application.</li> </ul>

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**Client applications**

Server	Software	Software level
Web application client	Various	<ul style="list-style-type: none"> <li>Internet Explorer 10 or 11</li> <li>Silverlight 5.0 (for Portrait HQ)</li> </ul>

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## Portrait Software - suite compatibility

Portrait Dialogue is compatible with the following Portrait Software.



<b>Software</b>	<b>Software level</b>
Portrait Foundation	5.0 Update 1
Portrait Miner	7.0B
Interaction Optimizer	5.6
Portrait Explorer	5.0

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**Note:** This guide takes you through installing Portrait Dialogue as a standalone application. If you want to install or integrate Portrait Dialogue with other Portrait Software applications, see the *Portrait Suite Installation Guide*.



# Setting up your server environment

## In this section:

- **Configuring your Application and Web servers . . . . .20**
- **Configuring your Database servers . . . . .22**

# Configuring your Application and Web servers

## Configure your Web Server and Application Server

Use the following procedures to configure your Application Server and Web Server role information. If you are using multiple servers or instances, you will need to repeat the procedures on all machines.

**Note:** Some of the steps might differ depending on your Windows Server version.

## Adding Web Server and Application Server role functionality

1. Log on to your Windows Server machine.
2. Click **Start > Administrative Tools > Server Manager**.
3. In the **Server Manager** window, expand the **Roles** feature and verify that **Application Server** and **Web Server** roles have been set up.
4. If the Web and Application Server roles have not been set up, right-click **Roles** and select **Add**. Check the Web Server and Application boxes (if same machine) and follow the install prompts to add them.

## Configuring Web Server roles

Use the following procedure to configure Web Server Role Services for Portrait Interaction Optimizer and Portrait HQ.

**Note:** This procedure assumes you are installing Portrait Dialogue and Portrait HQ on the *same machine*. If you are installing them on different machines then you will need to configure the role services separately.

1. In the **Server Manager** window, click **Roles > Web Server (IIS)**.
2. In the **Role Services** section on the right-hand pane, ensure the following items are installed. If not, right-click **Web Server (IIS)** and select **Add role services** and add the missing items.
  - **Management Tools**
  - **Windows Authentication and ASP.NET** (required for Portrait Dialogue and Portrait HQ)
  - **IIS 6.0 Management Compatibility** (required for Portrait Dialogue installation)
3. Click **Features** in the left panel and ensure the following items are installed for Portrait HQ. If not, click **Add Features** on the right and add the missing items.
  - **Message Queueing**

## Enabling IIS to run 32-bit applications on 64-bit Windows (optional)

If installing Portrait Dialogue on a 64-bit server, you must enable IIS to run 32-bit applications on 64-bit Windows.

1. Open a command prompt and navigate to the `%systemdrive%\Inetpub\AdminScripts` directory.
2. Type the following command: `cscript.exe adsutil.vbs set W3SVC/AppPools/Enable32BitAppOnWin64 1`.
3. Press ENTER. Note: Ensure that the IIS application pool used to run the Dialogue Web Applications is configured with a Managed Pipeline Mode of Classic. By default, Dialogue Web Applications use the DefaultAppPool application pool.

## Configuring Application Server roles

Use the following procedure to configure Application Server services for Portrait Dialogue and Portrait HQ.

**Note:** This procedure assumes you are installing Portrait Dialogue and Portrait HQ on the same machine. If you are installing them on different machines then you will need to configure the role services separately.

1. In the **Server Manager** window, click **Roles > Application Server**.
2. In the **Role Services** section on the right-hand pane, ensure the following services are installed:
  - **Application Server Foundation (on 32-bit machines only)**
  - **Web Server (IIS) Support**
  - **TCP Port Sharing**
  - **Windows Process Activation Service Support**
  - **HTTP Activation**
  - **Message Queueing Activation**
  - **TCP Activation**
  - **Distributed transactions**
  - **Named Pipes Activation**
  - **COM+ Network Access**
3. If not, right-click **Application Server > Add role services** and add the missing items.
4. Verify COM+ Network Access has been configured correctly:
  - a) Select **Administrative Tools > Component Services**.
  - b) In the side explorer menu, open **Component Services > Computer**.
  - c) Right-click **My Computer** and select **Properties**.
  - d) Ensure **Enable Distributed COM on this computer** is checked on the **Default Properties** tab and **Use local coordinator** on the **MSDTC** tab.
  - e) Portrait Dialogue transactions often run longer time than the default Windows Server 2008 transaction timeout setting of sixty seconds. To update this, click the **Options** tab and enter 0 in the **Transaction timeout** field.
5. Verify distributed transactions service is set up correctly:

- a) Select **Administrative Tools > Component Services** .
- b) In the side explorer menu, open **Component Services > Computer > Distributed Transaction Coordinator** .
- c) Right-click **Local DTC** and select **Properties**.
- d) Ensure **Network DTC Access** is checked on the **Securities** tab.

## Configuring users and groups

We recommend creating a system user and user group for ease of administrating access to Portrait Dialogue applications.

1. Create one domain user account with local administrator rights, for example, <yourdomain\MhSystemUser.
2. Create one domain user group, for example, <yourdomain\MhUsers.
3. Open **Computer Management** and **Distributed COM users**, and add the domain user group.

# Configuring your Database servers

## Verifying the SQL agent service is running

Use this procedure to verify the SQL agent service is running.

1. Log on to your SQL Server machine.
2. Click **Start > All Programs > Microsoft SQL Server > SQL Server Management Studio** .
3. Connect to the instance of the Database Engine, as the `admin` user. In the **Object Explorer** window, right-click **SQL Server Agent (Agent XPs disabled)** and select **Start**.

## Configuring network support for MS DTC

Portrait Shared Server uses the Distributed Transaction Coordinator to coordinate some updates to the Portrait Shared Repository database. If your database server is a separate machine to your PSS server, then you must enable network support in MS DTC on **both** the database server and the PSS server.

Use this procedure to enable network support for Microsoft's Distributed Transaction Coordinator.

1. Log on to the server.
2. Navigate to the **Run** command line and type `dcomcnfg.exe`.
3. In the **DCOM Configuration** application, expand the tree to **Component Services > Computers > My Computer > Distributed Transaction Coordinator > Local DTC** .
4. Right-click **Local DTC**, click **Properties** and click on the **Security** tab.
5. Check the **Network DTC access** and also **Allow Inbound** and **Allow Outbound** checkboxes.

# Installing the Dialogue Database

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## Introduction

This section guides you through setting up Portrait Dialogue with one database and instance. The steps should be repeated for each additional database.

## Before you begin

Before you begin, ensure you have:

- Created the Portrait Dialogue database and a database user with full access to the database
- Checked that all prerequisite software has been installed.
- Installed the database client tools and preferably the management tools on the application server
- Tested the database connectivity between the application server and the database server

We recommend running the installation from the application server. If for any reason this is not possible you can run it directly on the database server, but this will require manual creation of the instance, and sharing of root directory on the application server after installing the dialogue server

**Note:** For SQL Server it is recommended that you give the new PD database a collation of `Latin1_General_CI_AS`. However if your customer data is held in a database that do not use a Latin1 collation, then you should set the PD database collation to match that of your customer database. In these circumstances, take care when writing SQL that compares data sourced from Portrait Shared Repository or Portrait Data Warehouse databases (that have collation `Latin1_General_CI_AS`) with customer data.

## Installing the Portrait Dialogue database

1. To start the installation, double-click **InstallMenu.exe** which can be found in the root directory of the Portrait Dialogue installation media (DVD/zip files).
2. Click **Setup Dialogue Database**. The **Welcome** screen appears.
3. Click **Next** to continue. The **Destination Folder** screen appears.
4. Select the installation folder (or accept the default location) and then click **Next** to continue. The **Database Type** screen appears.
5. Select the database server type you are installing Portrait Dialogue to and then click **Next**. The **Database Server** screen appears.
6. Choose the database server (Server name for SQL Server or TNS alias for Oracle).
7. Enter your username and password credentials which must have administrative privileges on your SQL Server. Note: Windows authentication only supported on SQL Server.
8. Enter (or browse for) the name of database (only applies to SQL Server).



9. If you cannot browse the database catalog, your user credentials may be incorrect. Click **Next** to continue, the **Instance Name** screen appears.

**Note:** The information entered here is used as the connection settings for the Instance you define later in the setup. The instance connection string can be altered later using the Dialogue Admin tool.

10. Enter the instance name for your installation, for example:

- PROD (for production)
- TEST (for testing)
- DEV (for development)

The name cannot contain any special characters (like \$ % ) or space (blanks).

11. Enter a short identifier (ISID) for your new instance. The short identifier must consist of one or two uppercase alphabetic characters.

12. Click **Next** to continue. The **Customer ID Datatype** screen appears.

13. Choose the datatype to use for the Customer ID field, and then click **Next**.

**Note:** Examine the customer data you are going to use with Portrait Dialogue. To get optimal performance we recommend using the same datatype for the Customer ID that you have in your customer database.

**Note:** If you are going to use `varchar` as your customer id datatype, the collation of the Dialogue Server database and the customer ID column in your customer database must be the same. This setting is global for the current instance. It can be changed later using SQL scripts provided on the install CD (SQL Server Only).

**Note:** No script is available for Oracle, and there is only support for four data types:

- String (`varchar2(40)`)
- Unicode string (`nvarchar2(40)`)
- Numeric (`number(31, 0)`)
- Integer (`integer`)

14. On the **Template Folder** screen, select the root folder for templates and file storage for this instance. Check the **Share** checkbox to share the folder as MH, and then click **Next** to continue.

**Note:** If you chose to alter the default path, make sure you take the Instance name into consideration in the path if running multiple instances.

15. Click **Install**.

## Verifying the database installation

1. Open **SQL Server Management Studio** and log on to the server using the same credentials you specified during the install.
2. Check that the Portrait Dialogue tables are populated in the database.
3. Open a new query window and execute the following query:

```
select * from SYSTEM_INFO.
```

4. Verify that you get the correct version returned in the `SI_DATABASE_VERSION` field.

**Note:** All system SQL queries in Portrait Dialogue are written without database and user prefix i.e. `select * from db.dbo.mytable` is written `select * from mytable`. So your user account used in the connection string must be set up to support this.

# Installing the Dialogue Server

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## Introduction

This section guides you through installing the Dialogue Server.

## Before you begin

Before you begin, ensure you have:

- Uninstalled any other instances of Dialogue Server that have been installed on the server. **Note:** You can only run one Dialogue Server per application server - the Dialogue Server runs as a COM+ package and 3 Windows services.
- Installed the Portrait Dialogue database described in the previous section
- Checked that all prerequisite software has been installed.
- Created a user account (local or domain) with local administrator rights to use as the Dialogue Server service account
- Logged on to the application server with a user that has administrative rights.

**Note:** If you want to use Windows authentication in Portrait Dialogue, you must use a domain user account as the Dialogue Server service user account.

**Note:** The Dialogue Server runs as a 32-bit application on either 32 or 64-bit operating systems.

## Installing the Dialogue Server

1. To start the installation, double-click **InstallMenu.exe** which can be found in the root directory of the Portrait Dialogue installation media (DVD/zip files).
2. Click the **Install Dialogue Server**. The **Welcome** screen appears,
3. Click **Next** button to continue. The **Destination Folder** screen appears.
4. Select the Portrait Dialogue Server installation directory (or accept the default option). Click **Next** to continue. The **Setup Type** screen appears.
5. Select the installation type and click **Next**. The **Logon Information** screen appears.
6. Enter the credentials for the user account that the Dialogue Server processes will run under. This is the Dialogue Server service user account. The username must be in the form: `<domain>\<user-name>` or `<machine name>\username`.

You can also create an account using the “New user Information” during setup.

**Note:** The installation will verify the credentials you enter. If for some reason this verification fails, you will get an error message. You may ignore this and continue if you are sure the credentials are right.

7. Click **Next** to continue.
8. Click **Install**.

## Windows Server 2016

Support for the Application Server role was removed from Windows Server 2016. This change blocks application that rely on COM+ remote access. This problem concerns the operation of the Portrait Dialogue Server as it is implemented in COM+ technology.

To solve this problem, follow the steps described on the webpage <https://support.microsoft.com/en-us/help/3182294/0x80004027-error-when-you-try-to-remotely-access-com-object-after-you>.

## Installing the Portrait Dialogue License

After you have installed the server, you need to copy a Portrait Dialogue license file into the folder where the server was installed. This file is provided by Portrait Bowes Software or one of its distributors. Restart the Dialog Server COM+ application (using **Component Services**) after the file has been installed.

The default folder for the license file is: `<portrait dialogue root directory>\Dialogue Server`



# Installing Dialogue Web Applications

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- **Before you begin** .....32
- **Installing Dialogue Web Applications** .....32
- **Verifying the web solution installation** .....33
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- **Configuring authentication type** .....34
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- **Enabling Link Tracking Integrity Checking** .....36
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## Introduction

This section guides you through installing the Portrait Dialogue web applications.

The web applications are typically installed on an internal server (usually the same server as the Dialogue Server) and optionally on a public (Internet) server. You can install the web applications on an existing web site or create a new site to use.

## Before you begin

Before you begin, ensure you have:

- Installed the Dialogue Server and Database
- Checked that all prerequisite software has been installed.
- The URL to the Dialogue Server API (Web services used by the Web Applications)
- Set up a new IIS web site or have the name of an existing site to use

## Installing Dialogue Web Applications

1. To start the installation, double-click on `InstallMenu.exe`, which can be found in the root directory of the Portrait Dialogue installation media (DVD/zip files).
2. Click on **Install Web Applications**. The **Welcome** screen appears.
3. Click on **Next**. The **Destination Folder** screen appears.
4. Choose an installation folder or accept the default option. One folder is created for each of the web applications. The folders will be web shared.
5. Click on **Next**. The **Setup Type** screen appears.
6. Choose to install all web applications (**Complete**) or a subset (**Custom**). Click on **Next** to continue.
7. Overview of the different web applications:
  - **Dialog Server API**—Web service API for the Dialogue Server. Must be installed on the application server where the Dialogue Server is running.
  - **Customer View**—Customer View normally installed on the internal web server.
  - **Customer Web Access**—Hosting applications for questionnaire surveys and viewing email on web. Normally installed on the public web server.
  - **Telemarketing Web**—Telemarketing application normally installed on the internal web server.
  - **Report Portal**—Report Portal application normally installed on the internal web server. Must be installed to use integrated reporting in Visual Dialogue.
  - **Report Viewer**—Report Viewer application used to provide simple access to internal and external users for viewing reports. Normally installed internally, optionally installed on the public server.



- **Questionnaire Preview**—used by Visual Dialogue to test and preview questionnaires. Must be installed for questionnaires to work in Visual Dialogue.
- **Dashboard**—Support for this web application is deprecated from version 5.2 onwards. Dashboard will not be installed by default during a “Complete” installation. You will need to perform a “Custom” installation and select this component for it to be installed. Access rights for Dashboard users will need to be explicitly set in Dialog Admin.
- **Emarketing**—HTML email designer normally installed internally. Must be installed for Message Designer templates to work in Visual Dialogue.
- **Web Utilities**—Hosting applications email, link, response tracking, and published files on web. Normally installed on the public web server.

Choose the web site to install the web application to. Make sure you enter the correct name: no verification is done. If you enter an incorrect website name, the installation will fail later. The name of the site configured on the server is shown in the IIS manager.

8. If you want to optionally configure web sharing manually, check **Only copy files** to copy the files to the install directory without creating web shares. If not, leave the field unchecked.
9. Check **Enable Windows Authentication** to configure the internal web applications to use Windows authentication.
  - a. If you checked **Only copy files**, additional screens appear where you can override default web share names for the different web applications - if required.
10. Some of the applications require write access to a subfolder (for logging, caching, etc.) to work. To automatically set this permissions check this option. This will give the “everyone” user group-write access. You can alter this later to strengthen security.
11. Enter the name of your company. This information is used by the Message DDesigner application.
12. Enter error logging options for the Message Designer application.
13. Enter the URL to the Dialogue Server API and the system administrator email address and phone number.
14. Click on **Install**.

## Verifying the web solution installation

The first thing to check is the MHDialogServerAPI (web services) application.

Check that you can access the web service overview page by entering the URL to the MHDialogServerAPI in a browser from all servers you installed any web application to.

**Example URL:** <http://vmdev-test01/MHDialogServerAPI/APIOverviewPage.aspx>

Further testing of the different web applications needs to be done when you have configured the first domain on your new instance.

## Configuring questionnaire preview support

For the questionnaire preview functionality to work correctly, the url to the **Questionnaire Preview** web server must be added to Internet Explorer trusted sites on the dialogue server.

### Steps to configure questionnaire preview support on the dialogue server

1. Log on to the machine where the dialogue server is installed.
2. Start Internet Explorer.
3. Open **Internet options**.
4. Go to the **Security** flip.
5. Select **Trusted sites** and click **Sites**.
6. Add the url to the server where the **Questionnaire Preview** application is installed.
7. Restart the Dialog Server COM+ application (using **Component Services**).

## Configuring authentication type

Customer View, Telemarketing, Report Portal, Web Portal, and Dashboard support two different authentication mechanisms:

<b>Forms authentication</b>	This is the default authentication type. The user logs in using a web-based login page.
<b>Mixed authentication</b>	In this case, the user is first authenticated using Windows authentication. If this is successful, the user is automatically logged in. Otherwise, the user is redirected to the forms authentication page.

If you want to change the authentication type that you chose during installation, you must do this manually as described in [Changing authentication type in web.config](#) on page 35.

If you are using forms authentication, no special IIS configuration is needed. If you want to use mixed authentication, you need to configure IIS specially.

### IIS configuration for mixed authentication

1. Open the MHDialogServerAPI web share in IIS Manager, and switch to Content View.
2. Right click on WindowsAuthenticationAPIService.asmx and switch to features view. Locate and double-click on the **Authentication** option in the right-hand pane. Ensure that only Windows authentication and ASP.NET impersonation are enabled.
3. The WinLogin/WinLogin.aspx page in Customer View, Telemarketing, Report Portal, and Dashboard must only allow Windows authentication and ASP.NET impersonation. Select the WinLogin/WinLogin.aspx page in IIS, and switch to features view. Locate and double-click on the **Authentication** option in the right-hand pane. Ensure that only Windows authentication and ASP.NET impersonation are enabled.

It may be that Forms Authentication is also enabled and impossible to disable. IIS will also give the warning "Challenge-based and login redirect-based authentication cannot be used simultaneously." Ignore this, it still works.

### **Changing authentication type in `web.config`**

- For forms authentication:

- The `forms` element must have the attribute `loginUrl="Login.aspx"`.
- The following element must be present in the `appSettings` section:

```
<add key="AuthenticationType" value="Forms"/>
```

- For mixed authentication:

- The `forms` element must have the attribute `loginUrl="WinLogin/WinLogin.aspx"`.
- The following element must be present in the `appSettings` section:

```
<add key="AuthenticationType" value="Mixed"/>
```

## **Configuring the Dialogue Server API URL**

All Web Applications have a configuration file specifying the URL to the Dialogue Server API. If setting up a web application manually (not using the installation program), then you have to specify this URL manually.

### **Steps to set the Dialogue Server API URL manually:**

1. Open the web application's `Config\MH.DataAccessLayer.config` file.
2. Change the `serviceBaseLocation` attribute in the XML's root element to the Dialogue Server API URL you use.

## **Configuring the Dialogue Server API**

The Dialogue Server API can be configured for operation in two different modes: COM Server mode and API Proxy mode.

### **COM Server mode**

The COM Server mode is the default setting. In this mode the Dialogue Server API communicates with the Dialogue Server's COM components. The Dialogue Server API is normally set up with this configuration.

### **API Proxy mode**

Using the API Proxy mode, the Dialogue Server API acts as a proxy-server, passing all requests through to another installation of the Dialogue Server API server.

To enable this mode, set the `UseWebServices` value in `web.config` to `true`. The address of the Dialogue Server API must also be set:

```
<addkey="UseWebServices" value="true"/>
<addkey="WebServiceURL" value="http://server/MHDialogServerAPI"/>
```

### Configuring access to web services and methods

It is possible to enable and disable the different web services in the Dialogue Server API. Individual methods inside a web service can also be enabled or disabled. All web services and methods are by default enabled.

These settings are defined in an xml config file named `APIAccess.config`.

### Configuring access to instances

It is possible to enable and disable access to different Portrait Dialogue instances through the Dialogue Server API.

These settings are defined in the xml config file named `InstanceAccess.config`

## Enabling Link Tracking Integrity Checking

In version 6.0 SP1, a validation mechanism is introduced for link tracking. This ensures the integrity of tracked URLs in email and other messages, and protects against phishing attacks. The mechanism uses a check sum (in the URL) for validating that the destination URL is original and has not been tampered with. For more information, see *Link Tracking* in the *Portrait Dialogue Reference Guide*.

The validation mechanism is set to *off* by default to ensure compatibility with URLs in messages that have been sent out in previous versions of Portrait Dialogue. To turn validation on, open the `web.config` file (located in: `<WebUtilities>\LT\`) and set the `<checksum enable>` value to `true`:

```
<checksum enable="true">
  <instances>
    <!--<instance name="InstanceName" enable="true" defaultRedirect=""
/>-->
  </instances>
</checksum>
```

**Note:** For existing Portrait Dialogue users upgrading to 6.2, we recommend turning `checksum` validation on after a period of time when the effect of no longer supporting old links is negligible. For new Portrait Dialogue users, we recommend turning `checksum` validation on as part of the initial installation.

# Installing license for charting component in the Dashboard

The Dashboard uses a third party chart component in some of its widgets. If you want to use any of these widgets then you need a separately bought license. The license can be bought through Portrait Software or one of its resellers.

There are two license types: Web Site and Server.

License type	Description
<b>Web Site license</b>	The Web Site license is tied to a domain on a web server (e.g. www.yourdomain.com). It is not possible to move this license to a different domain later.
<b>Server license</b>	The Server license allows the use of the chart component on all web sites on a server regardless of domain. It is also possible to move the license to another server.

## Installing a Web Site license

1. Add the license file to the Dashboard's bin folder (it has a \*.lic file extension).
2. Replace the dotNetCharting.dll file the license applies to (the email containing the license file should contain a link to it) to the Dashboard's bin folder
3. Find the version number of the dotNetCharting file. You can find it by right clicking on dotNetCharting.dll in the bin folder and selection properties. You should find the version number on the General tab or on the Details tab (depending on which version of Windows you are using). This version number is from now on referred to as the "new version number".
4. Find the version number of the dotNetCharting file which was used when Dashboard was created. You can find it by right clicking on dotNetCharting.dll located in "Web\Dashboard\DotNetCharting\Web-Site license files" on the installation CD and selection properties. You should find the version number on the General tab or on the Details tab (depending on which version of Windows you are using). This version number is from now on referred to as the "old version number".
5. Add the <assemblyBinding> section shown in Example #2 below to the web.config file. Add it to the web.config's runtime section if it already exists. If it does not than create a new runtime section at the end of the configuration section (just before the </configuration> end tag) and add the assembly-Binding section there.

**Note:** you have to replace the parts *[old version number]* and *[new version number]* shown in the example with the version numbers you found earlier.

6. If the web.config file's configuration tag contains an xmlns attribute then remove it (the binding redirect is sometimes ignored when this is present). The configuration tag is the first tag in the web.config.

Example:

Remove the bold attribute.

```
<configuration xmlns="...">
```

### Server license

The Server license allows the use of the chart component on all web sites on a server regardless of domain. It is also possible to move the license to another server.

### Installing the Server license for the first time

1. Create a folder named "dotNetCharting" under "c:\windows\".
2. Add the following to the dotNetCharting folder:
  - The license file you received by email after buying the license (it has a \*.lic file extension).
  - The dotNetCharting.dll file the license applies to (the email containing the license file should contain a link to it).
3. Add the dotNetCharting.dll to the Global Assembly Cache (GAC). You can do this by dragging the assembly from "c:\windows\dotNetCharting" to "c:\windows\assembly. Note: the assembly folder is a special windows folder which behaves a bit differently compared to other folder. If you drag the file to the assembly folder and get a forbidden icon when you attempt to drop it, try to hold down the Ctrl key when you drag the file.
4. Remove the dotNetCharting.dll from Dashboard's bin folder.
5. Replace MHWebControls.dll and MHDB.dll in the Dashboard's bin folder with the ones found under "Web\Dashboard\DotNetCharting\Server license files" on the installation CD.
6. Find the version number of the dotNetCharting file. You can find it by right clicking on dotNetCharting.dll located in "c:\windows\dotNetCharting" and selection properties. You should find the version number on the General tab or on the Details tab (depending on which version of Windows you are using). This version number is from now on referred to as the "new version number".
7. Find the version number of the dotNetCharting file which was used when Dashboard was created. You can find it by right clicking on dotNetCharting.dll located in "Web\Dashboard\DotNetCharting\Server license files" on the installation CD and selection properties. You should find the version number on the General tab or on the Details tab (depending on which version of Windows you are using). This version number is from now on referred to as the "old version number".
8. Add the `<add ... />` tag shown in Example #1 below to the web.config. The add tag must be placed as shown in the example. This means that you have to create the compilation and the assemblies sections if the don't already exist.

**Note:** you have to replace the part [new version number] shown in the example with the new version number you found earlier.
9. Add the `<assemblyBinding>` section shown in Example #2 below to the web.config file. Add it to the web.config's runtime section if it already exists. If it does not than create a new runtime section at the end of the configuration section (just before the `</configuration>` end tag) and add the assembly-Binding section there.

**Note:** you have to replace the parts[old version number] and [new version number] shown in the example with the version numbers you found earlier.
10. If the web.config file's configuration tag contains an xmlns attribute then remove it (the binding redirect is sometimes ignored when this is present). The configuration tag is the first tag in the web.config.

Example:

Remove the bold attribute.

```
<configuration xmlns="...">
```

### Installing the Server license after an upgrade

The installation procedure is similar to “Installing the Server license for the first time” above except that the three first steps have already been completed. Proceed from step four.

#### Example #1:

```
<system.web>
  .....
  <compilation>
    <assemblies>
      <addassembly="dotnetcharting, Version=[new version number], Cul-
culture=neutral, PublicKeyToken=af2cd47db69d93bd" />
    </assemblies>
  </compilation>
  .....
</system.web>
```

#### Example #2:

```
<configuration>
  ...
  <runtime>
    <assemblyBindingxmlns="urn:schemas-microsoft-com:asm.v1">
      <dependentAssembly>
        <assemblyIdentityname="dotnetCHARTING"publicKeyTo-
ken="af2cd47db69d93bd" />
        <bindingRedirectoldVersion="[old version number]"newVer-
sion="[new version number]" />
      </dependentAssembly>
    </assemblyBinding>
  </runtime>
  ...
</configuration>
```





# Installing Portrait Shared Server

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## Installing PSS features

The Portrait Shared Server installer can install any of the following features:

- **Portrait Shared Server.** Provides the HQ web application and the Portrait Shared Services web services that integrate the Portrait product suite.
- **Database Administration.** Enables administration of the databases used by Portrait Shared Server. Install this feature on the SQL Server database server.
- **Data Warehouse Refresh.** Provides the SQL Server Integration Services packages that populate the Portrait Data Warehouse. Install this feature on the Integration Services server.
- **Reports.** Provides SQL Server Reporting Services reports that report on campaign performance. Install this feature on the Reporting Services server.
- **Tasks.** Provides a SharePoint site that manages tasks created when working with campaigns. Install this feature on the SharePoint server.

To install any of these features:

1. Log on to the server where Portrait Shared Server feature(s) are to be installed.
2. Open File Explorer and navigate to `Portrait Shared Server` on the release media (.iso).
3. Right-click `setup.exe` and click **Run as administrator**.
4. Click **Next** on the **Welcome** page.
5. Accept the license terms and conditions and click **Next**.
6. Accept the default destination folder and click **Next**.
7. Choose the installation type and click **Next**. When installing the full set of Portrait Shared Server features, click **Complete**, otherwise click **Custom**.
8. On the **Custom Setup** screen (shown if a custom installation type was selected in the previous step), select **This feature will be installed on local hard drive** for the features you wish to install. Select **This feature will be not be available** for features you do not wish to install. Click **Next**.
9. Click **Install** on the **Ready to Install the Program** dialog.
10. On the **InstallShield Wizard Completed** screen, click **Finish**.

## Configuring Portrait Shared Server

The `ConfigurePortraitHQ.ps1` PowerShell script allows you to configure the Portrait Shared Server features that are installed on a server.

1. Log on to the Portrait Shared Server.
2. Copy the `Silent Install Samples/PSS` and `Silent Install Samples/Utils` folders on the release media (.iso) to a local directory. For example, `C:\Program Files (x86)\PST\Portrait Scripts`.
3. On the **Start** screen, search for Portrait PowerShell.
4. Open the Portrait PowerShell application.

5. Navigate to the PSS sub-folder of the local directory. For example, run command `cd C:\Program Files (x86)\PST\Portrait Scripts\PSS`
6. Run command `ConfigurePortraitHQ.ps1`. See [ConfigurePortraitHQ.ps1](#) on page 54 for the syntax of this command.

#### ConfigurePortraitHQ.ps1 examples

To configure a new installation of Portrait Shared Server to integrate with Portrait Dialogue:

```
ConfigurePortraitHQ.ps1 -CreateDatabases $true -DBAccessUser-
name mydomain\myaccount -CreateWebSites $true -PSSWebAppPoolAc-
countDomain mydomain -PSSWebAppPoolAccountName myaccount -
PSSWebAppPoolAccountPassword mypassword -SetupDatabaseConnec-
tion $true -PDIntegration $true -PSSUserAccountName mydo-
main\myaccount -PSSUserAccountPassword mypassword
```

To deploy SSRS reports to a local Report Server:

```
ConfigurePortraitHQ.ps1 -InstallReportServer $true -DBAcces-
sUsername mydomain\mypassword -DBAccessPassword mypassword -
ReportIntegration $true -PSSUserAccountName mydomain\myaccount
-PSSUserAccountPassword mypassword
```

To add Portrait Tasks capabilities to the HQ:

```
ConfigurePortraitHQ.ps1 -InstallSharePointServer $true -
SharePointIntegration $true -PSSUserAccountName mydomain\my-
password -PSSUserAccountPassword mypassword
```

## Configuring the DW Populate SSIS Package

To configure the DW Populate SSIS package:

1. Log on to the Portrait Shared Server.
2. On the **Start** screen, search for Portrait PowerShell.
3. Open the Portrait PowerShell application.
4. Navigate to the administration sub-folder of your Portrait Shared Server installation, e.g. run command `cd C:\Program Files (x86)\PST\Portrait Shared Server\Administration`
5. Run command `SSISIntegration.ps1`. See [SSISIntegration.ps1](#) on page 83 for the syntax of this command.

## Connecting Portrait Shared Server to Dialogue Server

Portrait Shared Server makes use of Dialogue Server to perform HQ user authentication and authorization, as well as to create and execute Dialogues. The account that Portrait Shared Server uses to connect to Dialogue Server must be set up with the appropriate permissions.

1. On the Portrait Shared Server machine, open Internet Information Services (IIS).
2. Select **Application Pools** in the tree shown in the left-hand pane. In the right-hand pane, make note of the **Identity** of the Portrait Shared Server AppPool.
3. Open the Dialogue Admin application.
4. In the left-hand browser pane, navigate to the Database Instance with which the HQ is integrated.
5. Expand the instance in the tree and enter the credentials of a Portrait Dialogue user with admin rights. Click **OK** to log on.
6. Navigate to **Users and security > Users** in the tree. Right-click in the right-hand pane and click **New...**
7. On the **General** tab, enter the account name you noted in Step 2 above in the **User name** edit box. Tick the **Use Windows password** box. Enter "Service account for Portrait Shared Services" in the **Description** edit box.
8. Click on the **Access rights** tab and click **Edit...**
9. Tick 'Allow user to create user sessions for other users' beneath the MH Dialogue Server (internal) section of the permissions tree. Click **OK**.

## Changing PDW customer identifier data type

If the default value (of `varchar(40)`) was not chosen for the data type of customer identifiers when installing Portrait Dialogue, the Portrait Data Warehouse database schema must be modified to match the chosen data type. A SQL script called `ChangeDWCustomerIDType.sql` is provided to perform this schema modification.

1. Open the SQL Server Management Studio application. Connect to the database server hosting the Portrait Data Warehouse database.
2. Open the file `Portrait Shared Server\SQL\ChangeDWCustomerIDType.sql` on the Portrait Dialogue release media (.iso).
3. Select the Portrait Data Warehouse database from the **Available Databases** drop-down in the toolbar.
4. Replace all occurrences of `<PD customer ID column datatype>` with the data type that was chosen for customer identifiers. For example, replace `<PD customer ID column datatype>` with `int`.
5. Execute the SQL.

## Configuring Portrait HQ users

You must set up user accounts for each of the users that require access to the Portrait HQ application.

1. Open the Dialogue Admin application.
2. In the left-hand browser pane, navigate to the Database Instance with which the HQ is integrated.
3. Expand the instance in the tree and enter the credentials of a PD user with admin rights. Click **OK** to log on.
4. Navigate to **Users and security > Users** in the tree.
5. To modify an existing user, double-click the user in the right-hand pane.
6. To add a new user, right-click in the right-hand pane and click **New...**
7. Enter the user's details on the **General** tab. If this user is a Windows account, enter the account name for **User name** and tick **Use Windows password**.
8. Click on the **Member of** tab and click **Add...** Select one or more of the Portrait HQ user groups to grant the user the access rights associated with the user group. See topic 'Roles and permissions' in the *Portrait Dialogue Reference Guide* for a description of the default set of access rights granted for each user group.
9. To grant additional permissions to this user, click on the **Access rights** tab. Tick **View inherited group permissions** to see the permissions granted via user group membership. Click **Edit...** to selectively grant additional permissions.

**Tip:** You can edit user groups, or create custom user groups, to change the set of access rights granted to a group of users. See topic 'Configuring access rights for a user group' in the *Portrait Dialogue Reference Guide* for details.

## Configuring Portrait HQ settings

The following settings need to be set in order for Portrait HQ to integrate with Portrait Dialogue:

- `PssEnableAnalytics` enables Portrait Miner integration if that is installed.
- `PssEnableCampaigns` enables the Portrait HQ icon in Visual Dialogue.
- `PssHqUrl` is the url to the Portrait HQ web installation.
- `PssServiceBaseUrl` is the url to the PSS.

The settings can all be found in Dialog Admin under `General Admin / Parameter collections / PSS Integration`.

## Configuring Portrait HQ Silverlight integration

Portrait HQ is built on top of Silverlight 5 which supports the hosting of web browser controls within Portrait HQ. This means certain Portrait Dialogue web applications can be embedded within Portrait HQ for improved user experience and integration.

To enable this improved functionality, Portrait HQ must be run with evaluated trust. This involves the following network administrator set up:

### Updating the Client Registry

Configure client computers to allow trusted applications inside the browser by enabling the following registry key:

Setting key path for 32-bit computers:

```
HKEY_LOCAL_MACHINE\Software\Microsoft\Silverlight\
```

Setting key path for 64-bit computers:

```
KEY_LOCAL_MACHINE\Software\Wow6432Node\Microsoft\Silverlight\
```

Value name:

```
AllowElevatedTrustAppsInBrowser
```

Value type:

```
DWORD
```

Valid Values:

```
Disabled - 0x00000000
```

```
Enabled - 0x00000001
```

### Installing Certificate to Trusted Publishers certificate store

Portrait HQ is a signed application with a valid certificate. Install the certificate (*supplied with release CD*) to the Trusted Publishers certificate store and (*if necessary*) the Trusted Root Certification Authorities store.

For more information, see [http://technet.microsoft.com/en-us/library/cc730989\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc730989(WS.10).aspx)

**Note:** We recommend rolling out the changes via group policy. For more information, see:

- <http://www.grouppolicy.biz/2011/04/silverlight-5-group-policy/>
- [http://technet.microsoft.com/en-us/library/cc770315\(v=ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc770315(v=ws.10).aspx)

**Note:** A batch file `HQClientConfig.bat` has been included on the release media in the event you want to update individual machines.

## Setting up database data purging

Deleting an item from Portrait HQ removes the item from view but does not remove the data from the database. Purging deleted items from the system is achieved via stored procedures which exist in the Portrait Shared Repository and Portrait Data Warehouse databases.

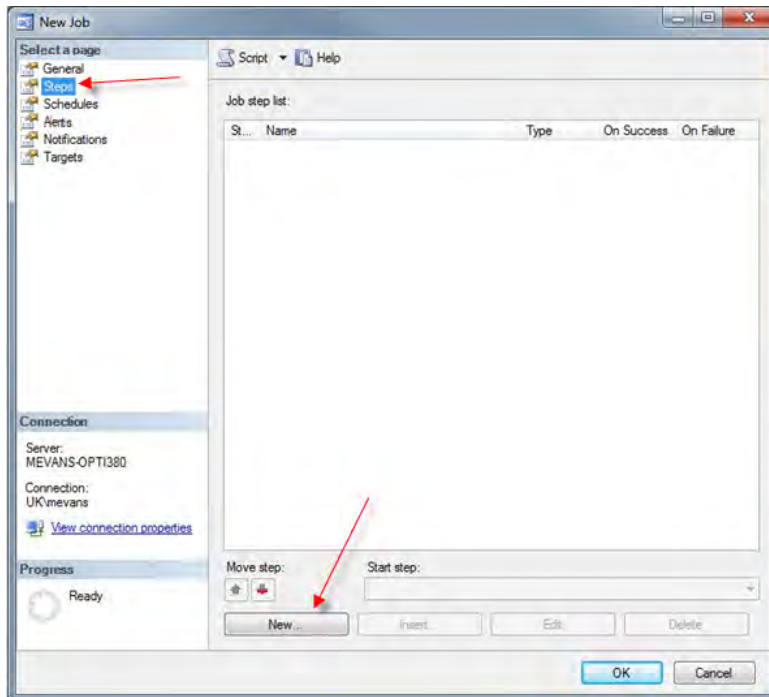
### Removing old history from the Data Warehouse database

Use the stored procedure `PurgeDWHHistory` to set up automatic purging of old history data from the Portrait Data Warehouse database. This procedure purges old request, treatment, behavior and response log records.

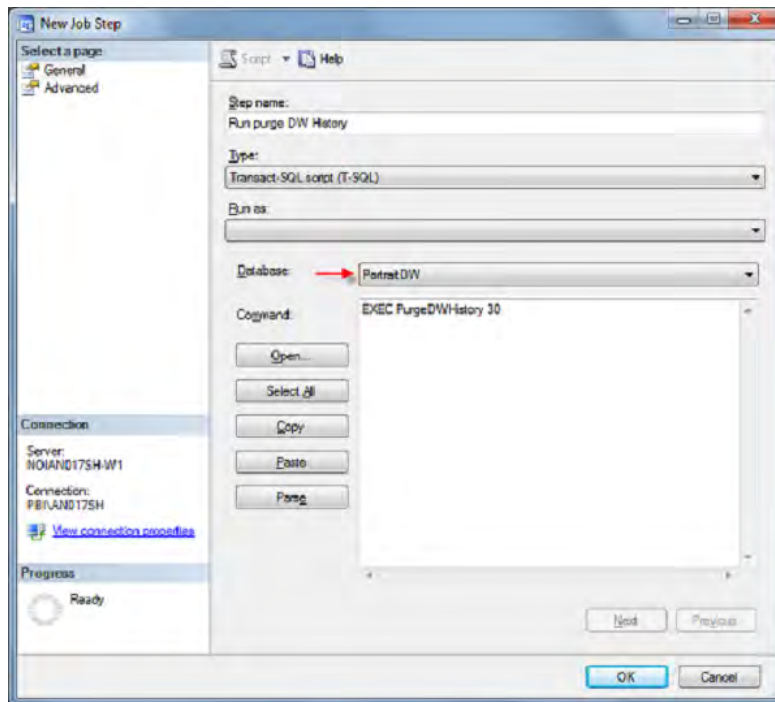
**Note:** By default, this procedure will remove data that is older than 90 days. Though a maximum of one month of data is removed for each run of `PurgeDWHHistory` to avoid long-running DELETE statements on databases where there is a large amount of data to be purged.

To schedule automatic purging:

1. Run SQL Server Management Studio.
2. Connect to the database server hosting the Portrait Data Warehouse database.
3. In the Object Explorer view, expand **SQL Server Agent**, right-click **Jobs** and click **New Job....**
4. On the **General** page, provide a name for the job. For example, 'Purge PDW History'.

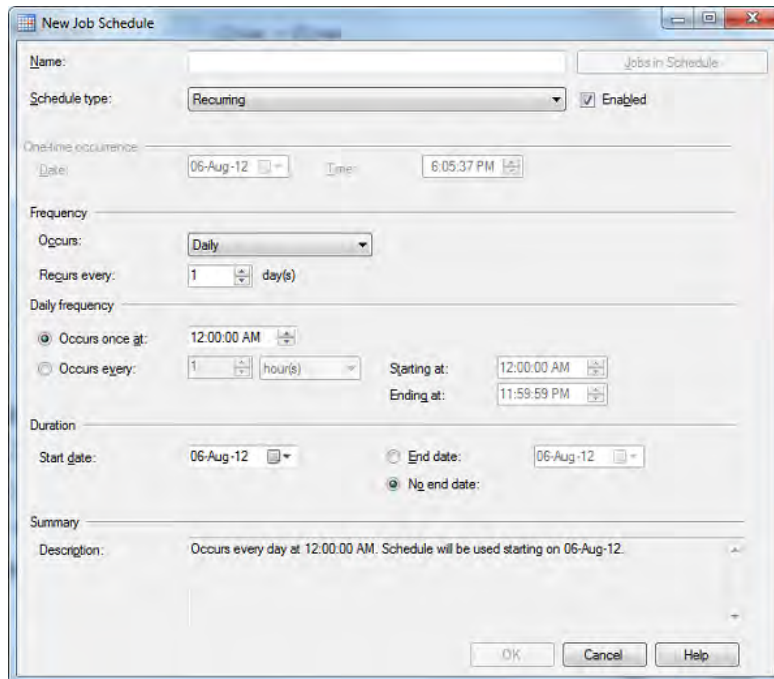


5. On the **Steps** page, click **New...**
6. Enter a name for the step. For example, 'Run PurgeDWHHistory'.
7. In the **Type** drop-down, select Transact SQL script (T-SQL).
8. In the **Database** drop-down, select the name of your Portrait Data Warehouse database. The default name of this database is 'PortraitDW'.
9. In the **Command** edit box, enter the command `EXEC PurgeDWHHistory`. Optionally provide an integer parameter that determines the number of days' worth of history to keep. If omitted, 90 days of history will be kept. Click **OK**.



10. On the Schedules page, click **New...**
11. Enter a name for the schedule. For example, 'Daily'.
12. Enter a recurring schedule for the PDW purge. A daily schedule is recommended. This ensures that the affected number of rows remains limited and does not cause table locks to be acquired on the affected tables. Click **OK**.





13. Click **OK** to complete the creation of the job. The new job will appear in the **Jobs** list in the Object Explorer view.

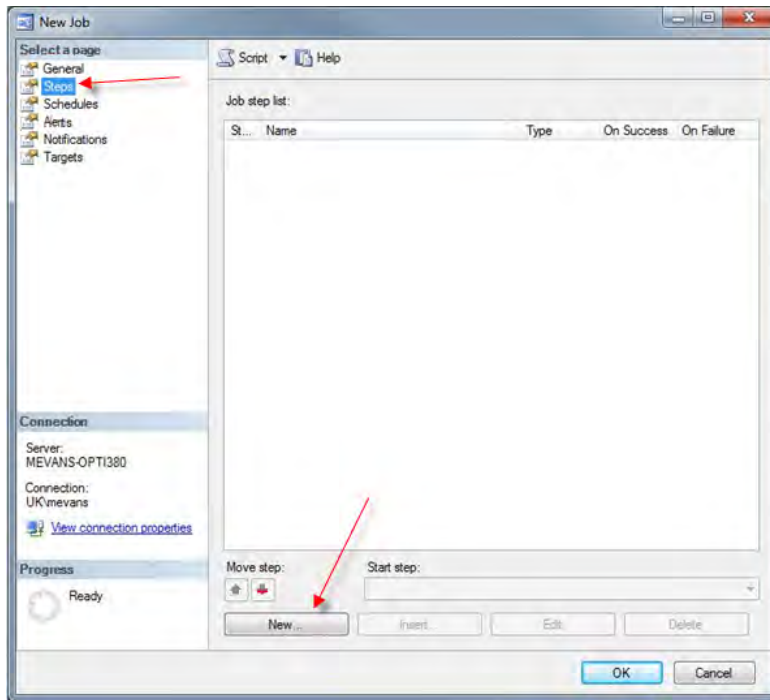
## Removing deleted entries from the PSR database

Use the stored procedure `PurgeDeletedEntities` to set up automatic purging of deleted entries from the Portrait Shared Repository database. This procedure purges old campaigns, lists, messages and selections that have been marked for deletion by the marketer in the HQ.

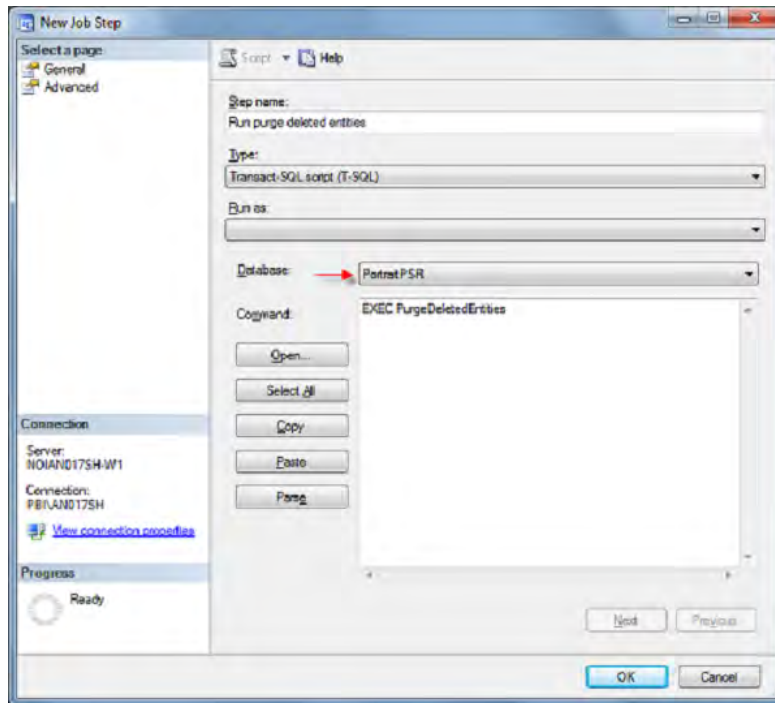
**Note:** By default, 14 days must elapse between marking an entity for deletion and running this procedure for the data to be removed.

To schedule automatic purging:

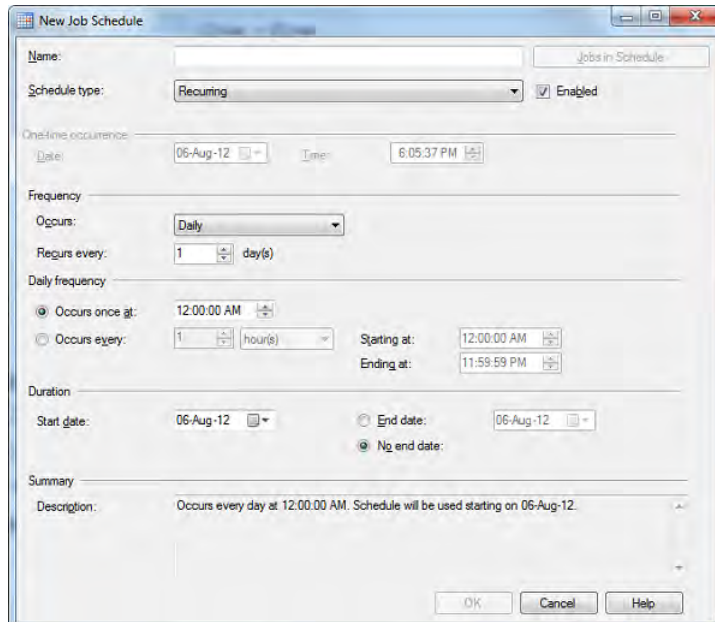
1. Run SQL Server Management Studio.
2. Connect to the database server hosting the Portrait Shared Repository database.
3. In the Object Explorer view, expand **SQL Server Agent**, right-click **Jobs** and click **New Job...**
4. On the **General** page, provide a name for the job. For example, 'Purge PSR deleted entities'.
5. On the **Steps** page, click **New...**



6. Enter a name for the step. For example, 'Run PurgeDeletedEntities'.
7. In the **Type** drop-down, select Transact SQL script (T-SQL).
8. In the **Database** drop-down, select the name of your Portrait Shared Repository database. The default name of this database is 'PortraitPSR'.
9. In the **Command** edit box, enter the command `EXEC PurgeDeletedEntities`. `PurgeDeletedEntities` takes three optional parameters. The first parameter is the number of rows to purge in a single batch (default is 1000). The second parameter is the maximum number of batches to purge (default is -1, which means that all data that can be purged is deleted.) The third parameter is the number of days data must be marked for deletion before the purge job deletes the data (default is 14). For example, `EXEC PurgeDeletedEntities 2000, 5, 7`. Click **OK**.



10. On the Schedules page, click **New...**
11. Enter a name for the schedule. For example, 'Weekly'.
12. Enter a recurring schedule for the PDW purge. A weekly schedule is recommended. Click **OK**.



13. Click **OK** to complete the creation of the job. The new job will appear in the **Jobs** list in the Object Explorer view.

# Mapping field names for analytics integration

## Field mappings

If your analytics datasets are built using field names that are different from the underlying field names in , or need to be resolved by expressions rather than field references, then you must publish a 'rule input mappings' definition to the repository. This controls how will map from analytics field input-names to field names when an analytics rule or decision optimization is executed within a dialog.

You can publish a set of rule-input mappings for by preparing an XML file and then running the **cmsmappingpublish** command-line utility within the environment. Each customer domain has its own mappings.

## Field-mapping definition format

A rule-input mappings file has a format like the following, where it specifies that it is defining mappings for use in , and it gives the *source* (what the field is called in ) and *target* (what the field is called in ) names for each field. You do not need to provide mappings for fields which have the same name in both and .

```
<?xml version="1.0" encoding="UTF-8"?>
<mapping system="PCM">
  <field source="PCM-Name" target="Analytics-FieldName"/>
  ...
</mapping>
```

Whenever the rule input-mappings need to be changed (if you add additional fields to your customer domain which have non-matching names in Analytics, for example), you can import a new set of mappings for that domain and the new mappings will take effect immediately - any subsequent execution of Analytics Rule or Decision Optimization operations in dialogs in that domain will immediately pick up the new mapping definition.

A `<field>` element in a mappings file can also include two additional optional attributes:

- **sourcetype**: This can be set as either **sourcetype="FIELD"** or **sourcetype="FUNCTION"**, and specifies whether the 'source' value should be interpreted by as being a customer domain field name or a function. If not given, then the default is FIELD.
- **type**: This can be used to describe the type of the field in the Analytics environment, and can have the value "integer", "real", "string" or "date". It is for description only - it does not have any effect on the meaning of the field mapping.

If the **sourcetype** is defined as "FUNCTION", then the value of the 'source' attribute must be a valid expression which returns a single value of one of the following data types: *string*, *integer*, *float*, *date-time/date*, or *boolean* (where a boolean is mapped to the integer values 0 for *false* and 1 for *true*).

**Example**

Here is an example of a mapping file that uses functions:

```
<?xml version="1.0" ?>
<mapping system="PCM">
  <!-- Maps to the answer of an integer question in a questionnaire.
  Returns NULL if the customer has not answered that questionnaire -->
  <field target="TI_Q1" sourcetype="FUNCTION" source="AnswerInt(1014,
  "Q1", "")" />
  <!-- Maps to the answer of single choice question (radio buttons)
  in a questionnaire. Returns the alternative key (e.g. "A1"), and NULL if the
  customer has not answered that questionnaire -->
  <field target="TI_Q2" sourcetype="FUNCTION" source="AnswerSingle-
  Choice(1014, "Q2")" />
  <!-- Maps to the answer of a boolean alternative of a question (check
  boxes) in a questionnaire. Returns true/false, and NULL if the customer has
  not answered that questionnaire -->
  <field target="TI_Q2_BOOL" sourcetype="FUNCTION" source="IsAn-
  swered(1014, "Q2", "A1")" />
  <!-- Checks if a message of a specific template has been created
  for the customer. Returns true/false -->
  <field target="TI_MSG_TEMPLATE_1170" sourcetype="FUNCTION" source="has
  Messages[templateid = 1170]" />
  <!-- Checks if a customer has a specific value in a category with
  values. Returns true/false -->
  <field target="TI_CATEGORY_1011_I5" sourcetype="FUNCTION" source="has
  Categories[Name = "CATEGORY_1011" and Value = "I5"]" />
  <!-- Checks if a customer has been treated by a dialog operation
  (requires participant logging in the dialog). Returns true/false -->
  <field target="TI_OFFER_1" sourcetype="FUNCTION" source="HasOpera-
  tionHistory(4519)" />
  <!-- Checks if a customer has been treated by a dialog branch (re-
  quires participant logging in the dialog). Returns true/false -->
  <field target="TI_OFFER_2" sourcetype="FUNCTION" source="HasBranch-
  History(1231)" />
</mapping>
```

## Portrait Shared Server silent install scripts

### InstallPortraitHQ.ps1

The `/Silent Install Samples/PSS/InstallPortraitHQ.ps1` script on the release media (.iso) silently installs the Portrait Shared Server software on a web server.

Syntax:

```
InstallPortraitHQ.ps1 [-UICulture <string>] -InstallLocation <string> [-Fea-
tureList <string>] [-InstallDirectory <string>]
```

Parameter	Description
-UICulture	The language used when reporting installation errors. Must be set to EN.

Parameter	Description
-InstallLocation	Path to the Portrait Shared Server installer within the release media (.iso). For example, F:\Portrait Shared Server.
-FeatureList	Comma-separated list of Portrait Shared Server features to install. Any combination of Common, DBAdministration, DataWarehouseRefresh and PortraitSharedServices. Defaults to ALL.
-InstallDirectory	Path to install Portrait Shared Server to. Defaults to C:\Program Files (x86)\PST\Portrait Shared Server\

**ConfigurePortraitHQ.ps1**

The `/Silent Install Samples/PSS/ConfigurePortraitHQ.ps1` script on the release media (.iso) silently configures Portrait Shared Server. This script can be used for the following administration tasks:

- Creating or upgrading the Portrait Shared Repository and Portrait Data Warehouse databases.
- Configuring Portrait Shared Server's connection to the database server.
- Creating the HQ and PSS web applications.
- Enabling or disabling IO, PD or PE capabilities within the HQ.
- Creating a SharePoint site to hold HQ tasks.
- Enabling or disabling task support within the HQ.
- Deploying SSRS reports to a Report Server
- Adding or removing links to view reports from the HQ.
- Enabling or disabling campaign approval in the HQ.

A single execution of `ConfigurePortraitHQ.ps1` can perform all of these tasks, or run `ConfigurePortraitHQ.ps1` multiple times to perform any subset of the tasks on each execution.

**Syntax:**

```
ConfigurePortraitHQ.ps1 -CreateDatabases <bool> -DBAccessUsername <string>
-CreateWebsites <bool> -PSSWebAppPoolAccountDomain <string> -PSSWebAppPoolAc-
countName <string> -PSSWebAppPoolAccountPassword <string> -SetupDatabaseCon-
nection <bool> -DBServerName <string> -DWDatabaseName <string> -PSRDatabaseName
<string> -IntegratedSecurity <bool> -DBUsername <string> -DBPassword <string>
-IOIntegration <bool> -IOServerURL <string> -PDIntegration <bool> -PEIntegra-
tion <bool> -WindowsAuthentication <string> -PSSUserAccountName <string> -
PSSUserAccountPassword <string> -InstallReportServer <bool> -DBAccessPassword
<string> -ReportServerURL <string> -ReportsURL <string> -ReportsServerInstan-
ceName <string> -ReportsDirectory <string> -ReportIntegration <bool> -Install-
SharePointServer <bool> -SharePointServerURL <string> -SharePointIntegration
<bool> -SetupAuthorisationAndAuthentication <bool> -ModifyPortraitMasCmsSer-
vicesIOConfig <bool>
```

Parameter	Description
<code>-CreateDatabases</code>	Whether to create or upgrade the Portrait Shared Repository and Portrait Data Warehouse databases. If <code>-CreateDatabases</code> is <code>\$true</code> then databases with the names provided via the <code>-PSR-DatabaseName</code> and <code>-DWDatabaseName</code> parameters are created, if they do not already exist. If these databases do exist, they are upgraded. If <code>-CreateDatabases</code> is <code>\$false</code> then no database management is performed. If omitted, defaulted to <code>\$false</code> .
<code>-DBAccessUsername</code>	Specifies the SQL Server Login that is granted access to database objects in the PSR and PDW databases. It is recommended that you supply the same Windows account for <code>-DBAccessUsername</code> as you supply via the <code>-PSSWebAppPoolAccountDomain</code> and <code>-PSSWebAppPoolAccountName</code> parameters. For example, <code>-DBAccessUsername mydomain\myusername</code> . Mandatory if <code>-CreateDatabases</code> or <code>-InstallReportServer</code> is <code>\$true</code> . Ignored if <code>-CreateDatabases</code> is <code>\$false</code> and <code>-InstallReportServer</code> is <code>\$false</code> .
<code>-CreateWebsites</code>	Whether to create the HQ and PSS web applications. If omitted, defaulted to <code>\$false</code> .
<code>-PSSWebAppPoolAccountDomain</code>	Domain of account to be used to run Portrait Shared Server. Ignored if <code>-CreateWebsites</code> is <code>\$false</code> .
<code>-PSSWebAppPoolAccountName</code>	Name of account to be used to run Portrait Shared Server. Ignored if <code>-CreateWebsites</code> is <code>\$false</code> .
<code>-PSSWebAppPoolAccountPassword</code>	Password of account to be used to run Portrait Shared Server. Ignored if <code>-CreateWebsites</code> is <code>\$false</code> .
<code>-SetupDatabaseConnection</code>	Whether to configure Portrait Shared Server's connections to the Portrait Shared Repository and Portrait Data Warehouse databases. If omitted, defaulted to <code>\$false</code> .
<code>-DBServerName</code>	Name of database server instance hosting the Portrait Shared Repository and Portrait Data Warehouse databases. Mandatory if <code>-CreateDatabases</code> is <code>\$true</code> or <code>-SetupDatabaseConnection</code> is <code>\$true</code> or <code>-InstallReportServer</code> is <code>\$true</code> . If omitted, defaulted to <code>(local)</code> .
<code>-DWDatabaseName</code>	Name of the Portrait Data Warehouse database. Mandatory if <code>-CreateDatabases</code> is <code>\$true</code> or <code>-SetupDatabaseConnection</code> is <code>\$true</code> or <code>-InstallReportServer</code> is <code>\$true</code> . If omitted, defaulted to <code>PortraitDW</code> .
<code>-PSRDatabaseName</code>	Name of the Portrait Shared Repository database. Mandatory if <code>-CreateDatabases</code> is <code>\$true</code> or <code>-SetupDatabaseConnection</code> is <code>\$true</code> . If omitted, defaulted to <code>PortraitPSR</code> .

Parameter	Description
-IntegratedSecurity	Whether to use Windows authentication to connect to the database server when creating or upgrading databases (-CreateDatabases is \$true). Whether to use the account running Portrait Shared Server to connect to the Portrait Shared Repository and Portrait Data Warehouse databases when configuring Portrait Shared Server's connection to these databases (-SetupDatabaseConnection is \$true). If omitted, defaulted to \$true.
-DBUsername	User name of the SQL Server authenticated login to be used to connect to the database server when creating or upgrading databases (-CreateDatabases is \$true). User name of the SQL Server authenticated login Portrait Shared Server uses to connect to the database server (-SetupDatabaseConnection is \$true). Ignored if neither -CreateDatabases or -SetupDatabaseConnection is \$true, or if -IntegratedSecurity is \$true.
-DBPassword	Password for -DBUsername. Mandatory if -DBUsername is supplied.
-IOIntegration	Whether Interaction Optimizer is integrated with Portrait Shared Server. If omitted, defaulted to \$false.
-IOServerURL	Base URL for IO web services. If omitted, defaulted to http://localhost.
-PDIntegration	Whether Portrait Dialogue is integrated with Portrait Shared Server. If omitted, defaulted to \$false.
-PEIntegration	Whether Portrait Explorer is integrated with Portrait Shared Server. If omitted, defaulted to \$false.
-WindowsAuthentication	Whether to use the current Windows account to log on to Portrait Shared Services. The current Windows account must be a user that has been granted the AllowedToLogOn and AllowedToAdminister permissions. If omitted, default to FALSE.
-PSSUserAccountName	User name for logging on to Portrait Shared Services. Must be a user that has been granted the AllowedToLogOn and AllowedToAdminister permissions. Mandatory if -WindowsAuthentication is FALSE and any of the following parameters are \$true: -ReportIntegration, -EnableCampaignApproval, -IOIntegration, -PDIntegration, -PEIntegration, -SharePointIntegration. Otherwise ignored.
-PSSUserAccountPassword	Password for -PSSUserAccountName. Mandatory if -PSSUserAccountName is supplied.
-InstallReportServer	Whether to deploy reports to the SSRS Report Server. If omitted, defaulted to \$false.



Parameter	Description
-DBAccessPassword	Password for SQL login DBAccessUsername. Used by SSRS reports to connect to the Portrait Data Warehouse database. Ignored if -InstallReportServer is \$false.
-ReportServerURL	SSRS Report Server URL. Ignored if -InstallReportServer is \$false and -ReportIntegration is \$false. If omitted, defaulted to http://localhost/ReportServer.
-ReportsURL	SSRS Report Manager URL. Ignored if -InstallReportServer is \$false. If omitted, defaulted to http://localhost/Reports.
-ReportsServerInstance-Name	SQL Server instance name where the Report Server resides. Ignored if -InstallReportServer is \$false. If omitted, defaulted to MSSQLSERVER.
-ReportsDirectory	Name of the root folder to install Portrait Reports to. Ignored if -InstallReportServer is \$false. If omitted, defaulted to Portrait.
-ReportIntegration	Whether to link the HQ with the SSRS reports (that are deployed if -InstallReportServer is \$true. If omitted, defaulted to \$false.
-InstallSharePointServer	Whether to create a SharePoint site to hold HQ tasks. If omitted, defaulted to \$false.
-SharePointServerURL	URL of the SharePoint site that you wish to create (when -InstallSharePointServer is \$true) or link to the HQ (when -SharePointIntegration is \$true). This URL must reside within a pre-existing SharePoint site collection. Ignored if -InstallSharePointServer is \$false and -SharePointIntegration is \$false. If omitted, defaulted to http://localhost/Portrait.
-SharePointIntegration	Whether to enable support for tasks within the HQ. If omitted, defaulted to \$false.
-EnableCampaignApproval	Whether to enforce approval of the set-up of each campaign step within the HQ. If omitted, defaulted to \$false.
-SetupAuthorisationAndAuthentication	Whether to only allow local users to log on to Portrait Shared Server. -SetupAuthorisationAndAuthentication would normally be set to \$true only in test environments. If omitted, defaulted to \$false.
-ModifyPortraitMasCmsServicesIOConfig	Reserved. Should always be \$false. If omitted, defaulted to \$false.

#### ExecuteCustomerMetadataTool.ps1

The /Silent Install Samples/PSS/ExecuteCustomerMetadataTool.ps1 script on the release media (.iso) silently runs the CustomerMetadataTool.

## Additional settings and defaults

---

Syntax:

```
ExecuteCustomerMetadataTool.ps1 [-ExternalSystem <string>] -DialogueDomainId  
<string> [-PSSUserAccountName <string>] [-PssUserAccountPassword <string>]
```

Parameter	Description
-ExternalSystem	The name of the external system to import. Must be set to <code>interactionoptimizer</code> , <code>explorer</code> or <code>dialogue</code> .
-Delete	If you wish to delete a system, this is the name of the external system to be deleted. Must be set to <code>interactionoptimizer</code> , <code>explorer</code> or <code>dialogue</code> .
-DialogueDomainId	If the external system being imported is <code>dialogue</code> , this is the Id of the Customer domain for your <code>dialogue</code> instance.
-PSSUserAccount- Name	User name for logging on to Portrait Shared Services.
-PSSUserAccount- Password	Password for logging on to Portrait Shared Services.

---

## Additional settings and defaults

The configuration file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\Db-Modules.config` defines PSS database default values, as well as some additional settings that cannot be specified via input parameters to the PSS silent install scripts. This configuration file contains the following settings:

Application setting key	Description
PSRDatabaseName	Name of the Portrait Shared Repository database. Default value is <code>PortraitPSR</code> .
DWDatabaseName	Name of the Portrait Data Warehouse database. Default value is <code>PortraitDW</code> .
DBAccessUsername	Account Portrait Shared Services uses to connect to Portrait Shared Repository and Portrait Data Warehouse databases.
DBUsername	User name for connecting to the database server to perform database creation or upgrade.
DBPassword	Password for connecting to the database server to perform database creation or upgrade.
DBServerName	Name of database server instance. Default value is <code>(local)</code> .
Sourceroot	Root location of the database SQL scripts. Default value is <code>C:\Program Files (x86)\PST\Portrait Shared Server\Portrait Shared Services\SQL</code> .
DWDatabaseNameForDrop	Name of the Portrait Data Warehouse database to remove. Default value is <code>PortraitDW</code> .

Application setting key	Description
PSRDatabaseNameForDrop	Name of the Portrait Shared Repository database to remove. Default value is <code>PortraitPSR</code> .
IntegratedSecurity	Whether to connect to the database server to perform database creation of upgrade using Windows authentication. Default value is <code>true</code> .

The configuration file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config` defines PSS default values, as well as some additional settings that cannot be specified via input parameters to the PSS silent install scripts. This configuration file contains the following settings:

Application setting key	Description
PssSvcUri	Specifies the URL for Portrait Shared Services. Default value is <code>http://localhost/PortraitSharedServices</code> .
IISWebsite	IIS web site hosting HQ and Portrait Shared Services web applications. Default value is <code>Default Web Site</code> .
IISWebsitePort	Port number of the IIS web site. Default value is <code>80</code> .
PSSWebAppPoolAccountDomain	Domain of account for Identity of PSS Application Pool.
PSSWebAppPoolAccountName	Account for Identity of PSS Application Pool.
PSSWebAppPoolAccountPassword	Account password for identity of PSS Application Pool.
PSSUserAccountName	User name for logging on to Portrait Shared Services.
PSSUserAccountPassword	Password for logging on to Portrait Shared Services.
ExplorerIntegrationEnabled	Whether Portrait Explorer is integrated with Portrait Shared Server. Default value is <code>false</code> .
ExplorerAnalyticsDataServerURL	URL for Analytics Data Server. Default value is <code>http://localhost:8080/analytics-data-server</code> .
DialogueIntegrationEnabled	Whether Portrait Dialogue is integrated with Portrait Shared Server. Default value is <code>false</code> .
DialogueServerURL	Base URL for Dialogue Server. Default value is <code>http://localhost/MHDialogServerAPI</code> .
DialogueInstanceName	Name of Dialogue Server instance. Default value is <code>default</code> .
IOIntegrationEnabled	Whether Interaction Optimizer is integrated with Portrait Shared Server. Default value is <code>false</code> .
IOServerURL	Base URL for IO web services. Default value is <code>http://localhost</code> .

Application setting key	Description
SharePointIntegrationEnabled	Whether SharePoint is integrated with Portrait Shared Server to provide tasks capability. Default value is <code>false</code> .
SharePointServerURL	URL of the SharePoint site hosting the Portrait Tasks list. Default value is <code>http://localhost/Portrait</code> .
ReportIntegrationEnabled	Whether to integrate SSRS reports with the HQ. Default value is <code>false</code> .
ReportServerURL	URL of the SQL Server Reporting Services Report Server. Default value is <code>http://localhost/ReportServer</code> .
ReportsURL	URL of the SQL Server Reporting Services Report Manager URL. Default value is <code>http://localhost/Reports</code> .
UICulture	Language code for the language to be used when displaying language strings in the HQ. Only <code>EN</code> is supported in this release.
Culture	The language code for the language to be used by culture-dependent functions, such as date, number and currency formatting. Only <code>EN</code> is supported in this release.
CampaignApprovalEnabled	Whether to enable campaign approval in the HQ. Default value is <code>false</code> .
MaxFrameRate	Maximum frames per second rendered by HQ application. Default value is <code>30</code> .
LogLevel	The level of information logged by the HQ. Choice of <code>Critical</code> , <code>Error</code> , <code>Warning</code> , <code>Information</code> or <code>Verbose</code> . Default value is <code>Verbose</code> .

---

The configuration file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\SSISModules.config` defines SSIS default values, as well as some additional settings that cannot be specified via input parameters to the PSS silent install scripts. This configuration file contains the following settings:

Setting	Description
IODBServerName	Name of the database server instance hosting the IO database. Default value is <code>(local)</code> .
IODatabaseName	Name of the IO database.
IOIntegratedSecurity	Whether DW Refresh SSIS package connects to the IO database using Windows Authentication. Default value is <code>true</code> .

Setting	Description
IODBUsername	Account DW Refresh SSIS packages uses to connect to the IO database.
IODBPassword	Password for account DW Refresh SSIS packages uses to connect to the IO database.
CredentialName	Credential name for SQL Server Agent proxy. This SQL Server Agent proxy is used to run the DW Populate SSIS package. Default value is <code>DW_Credential</code> .
ProxyName	Name of SQL Server Agent proxy to create. This SQL Server Agent proxy is used to run the DW Populate SSIS package. Default value is <code>DW_Proxy</code> .

The configuration file `<PSS Install Location>\Tools\CustomerMetadataTool.exe.config` defines CustomerMetaDataTable default values. This configuration file contains the following setting:

Setting	Description
PSS_URL	Specifies the URL for Portrait Shared Services. Default value is <code>http://localhost/PortraitSharedServices</code> .



# Configuring Portrait Dialogue

## In this section:

- **Introduction** .....64
- **Web parameters** .....64
- **Email parameters** .....64

## Introduction

For Portrait Dialogue to work correctly, some parameters have to be configured manually after the installation is finished. Most of these have to do with the web solutions. See the help file provided with Dialogue Admin for more help on how to change parameters.

## Web parameters

The following parameters have to be changed to match your web installation. They can all be found under General Admin - Parameter collections.

- Internal URLs/CustomerViewURL
- Internal URLs/DashboardURL

Dashboard links from the navigation pane and **View** menu in Visual Dialogue are disabled by default. To enable them, you will need to set the Internal URLs/DashboardEnabled parameter to "TRUE".

- Internal URLs/QuestPreviewURL
- Internal URLs/ReportPortalURL
- Internal URLs/ReportViewerURL
- Internal URLs/TelemarketingURL
- Internal URLs/WebPortalURL
- Public URLs/AnswerFormURL
- Public URLs/EmailMessageURL
- Public URLs/UnsubscribeURL
- Public URLs/WebProfileURL
- Public URLs/WebUtilsURL

## Email parameters

You have to set the name of the email server you will use to send emails. This can be found under Channel types/Email/Output channels. Open the email channel and edit the control parameter SMTP host IP to the match name of the host where your email server is installed.



## Appendix

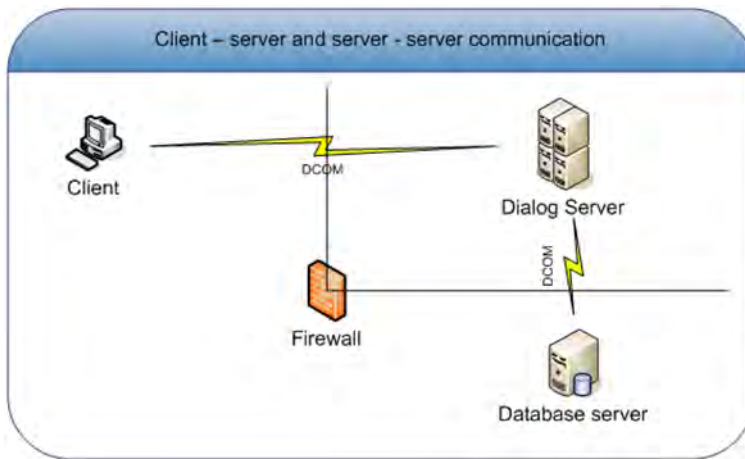
### In this section:

- **Configuring MTS and DCOM setup with firewalls/different domains . . . . .66**
- **Cloning DTC servers . . . . .67**
- **Portrait HQ datasheet . . . . .68**
- **SharePoint / Portrait Shared Server install considerations . . . . .69**
- **System setup configuration scripts . . . . .69**

# Configuring MTS and DCOM setup with firewalls/different domains

## Configuring DTC to Work Through a Firewall

This scenario applies to both client – Dialogue Server, and Dialogue Server – database server communication. The server – database server communication is only applicable when you use Microsoft SQL Server, and NOT when you use Oracle DBMS.



You can configure DTC to communicate through firewalls, including network address translation firewalls.

DTC uses Remote Procedure Call (RPC) dynamic port allocation. By default, RPC dynamic port allocation randomly selects port numbers above 1024. By modifying DTS setup, you can control which ports RPC dynamically allocates for incoming communication. You can then configure your firewall to confine incoming external communication to only those ports and port 135 (the RPC Endpoint Mapper port).

You must provide one incoming dynamic port for DTC. You may need to provide additional incoming dynamic ports for other subsystems that rely on RPC.

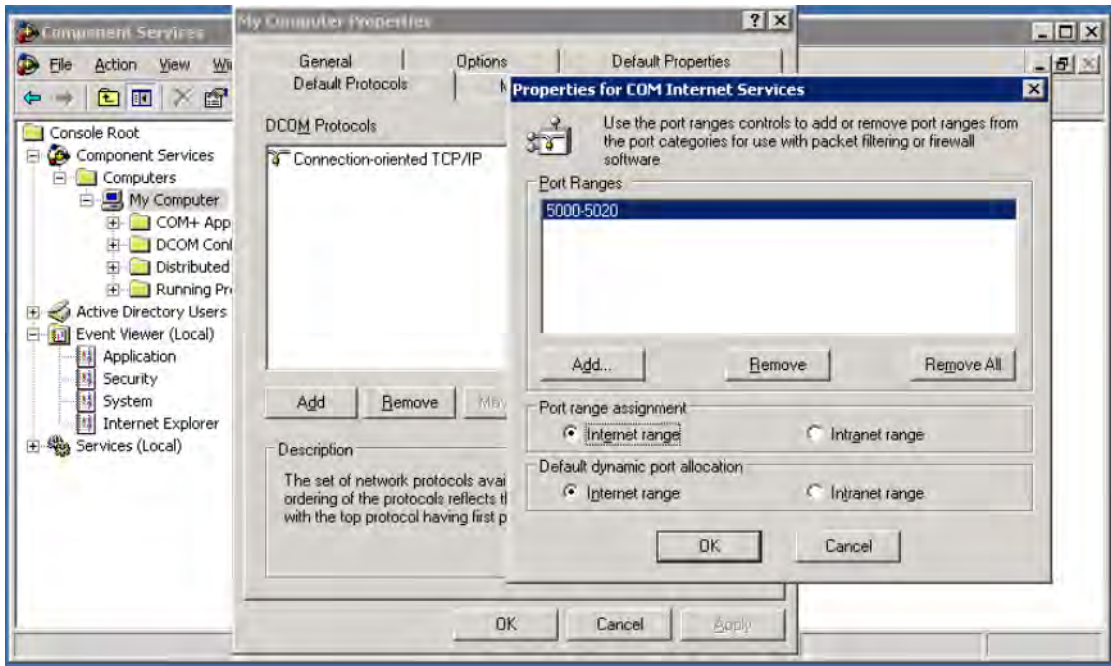
## General

DTC requires that you are able to resolve computer names by way of NetBIOS or DNS. You can test whether or not NetBIOS can resolve the names by using ping and the server name. The client computer must be able to resolve the name of the server, and the server must be able to resolve the name of the client. If NetBIOS cannot resolve the names, you can add entries to the LMHOSTS files on the computers.

To configure client – server communication you only need to change DTC settings on the Application server. For Application server – database server communication you need to change DTC settings on both servers.

## Setting up DTC

To control RPC dynamic port allocation open “Component services”. Right click on “My Computer” choose “Properties”. On the “Default Protocols” tab make sure the TCP/IP protocol is in top of the list. Click on this and add the port range as shown below:



Microsoft recommends that you open up ports from 5000 and up, and that you open a minimum of 15 to 20 ports.

You must reboot the server for applying these settings.

## Setting up the firewall

The firewall must be open in both directions for the specified ports (tcp/ip) and for port 135 (UDP).

## Cloning DTC servers

Often IT departments use cloning tools to roll out new servers. If you clone a server you should always make sure the machines have unique identities. If they have the same identity the DTC services are unable to communicate. You will get the following error in the event log:

The local MS DTC detected that the MS DTC on “CLONED SERVER” has the same unique identity as the local MS DTC. This means that the two MS DTC will not be able to communicate with each other. This problem typically occurs if one of the systems were cloned using unsupported cloning tools. MS

DTC requires that the systems be cloned using supported cloning tools such as SYSPREP. Running 'msdtc -uninstall', do a reboot and then 'msdtc -install' from the command prompt will fix the problem. Note: Running 'msdtc -uninstall' will result in the system losing all MS DTC configuration information. Note: On Windows 2008 Server with UAC enabled, the commands must be run as administrator.

## Portrait HQ datasheet

Use this datasheet when installing Portrait Shared Server. We recommend you print this checklist and fill in all information prior to completing your installation/upgrade.

Installation item	Recommended or default value
Installation or destination folder	C:\Program Files\PST\Portrait Shared Server\
Installation type	Complete
Database user domain	To be determined at time of install
Database user name	To be determined at time of install. This SQL login must be granted the CREATE DATABASE permission and be a member of the db_ddladmin and db_datareader fixed database roles for the tempdb database.
Database login user's password	To be determined at time of install
HQ SQL server instance	To be determined at time of install
Portrait Shared Repository database name	PortraitPSR
Portrait Data Warehouse database name	PortraitDW
Portrait HQ Service Account domain	To be determined at time of install
Portrait HQ Service Account name	To be determined at time of install
Portrait HQ Service Account password	To be determined at time of install
Portrait Dialogue server address	http://localhost/mhdialogserverapi
Portrait Dialogue server instance	Default
Portrait SharePoint services address	http://localhost/Portrait
Currency symbol	To be determined at time of install
Base IO web service address	http://localhost
Report server URL	Default = http://localhost/ReportServer

## SharePoint / Portrait Shared Server install considerations

If you install SharePoint (optional) and Portrait Shared Server together on a single machine, then they have to run within separate web sites. You will have to decide which of them will run on the default port of 80, and which of them will run on some other port. Then carry out the following steps during the install:

- If you are happy to run SharePoint on port 80, and the Portrait Shared Server applications (and any other web applications on the server) on some other site, then you will have to modify the properties of the IIS "Default Web Site" to change its port to something other than 80, then start it running. Alternatively (and this is the recommended configuration), if you would rather run the Portrait Shared Server applications (and any other web applications on the server) on the default port 80, and run SharePoint on some other port. Then you will have to start the IIS "Default Web Site", as it will have been stopped when you installed SharePoint. If PCM is already installed on the "Default Web Site", then it's a good idea to install SharePoint to a new website called "SharePoint - 8080" on port 8080. This is done under the SharePoint installation.
- Define "Alternate Access Mappings" for each URL that SharePoint needs to be accessible on. For instance, if you have changed the port that SharePoint is running on, then you must edit the mapping that referred to the old port, to give it the new port instead. Additionally, you should create extra mappings for the fully-qualified domain-name variants of each internal URL if you need the SharePoint site to be accessible via a fully-qualified domain name (as by default SharePoint only provides mappings for the simple unqualified form).
- To set up these mappings, run the SharePoint Central Administration tool (from "Administrative Tools" on the start menu), go to the "Operations" menu, and select "Configure alternate access mappings".

**For example**, if you have changed your SharePoint to run on *myserver:8090* instead of *myserver:80*, and you also want it to be accessible as *myserver.mydomain.mycompany.com*, then you need to:

- edit the existing *http://myserver:80* mapping to change its port to 8090.
- edit that mapping again to define an 'intranet' or 'internet' fully-qualified equivalent URL *http://myserver.mydomain.mycompany.com:8090*.

## System setup configuration scripts

### AdminSettings.ps1

<b>Script name</b>	AdminSettings.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	To set the Portrait HQ display language, enable or disable HQ campaign approval, or manage HQ logging levels.

**Syntax**

```
AdminSettings.ps1 [[-WindowsAuthentication] <String>] [-PSSUserAccountName] <String> [-PSSUserAccountPassword] <String> [[-UICulture] <String>] [[-Culture] <String>] [[-CampaignApprovalEnabled] <String>] [[-LogLevel] <String>]
```

where:

- **WindowsAuthentication** specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- **PSSUserAccountName** is the user name for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **PSSUserAccountPassword** is the password for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **UICulture** is the language code for the language to be used when displaying language strings in the HQ. Must be set to `en`.
- **Culture** is the language code for the language to be used by culture-dependent functions, such as date, number and currency formatting. Must be set to `en`.
- **CampaignApprovalEnabled** is the flag to specify whether to enable campaign approval in the HQ. If omitted, defaulted to `false`.
- **LogLevel** is the level of information logged by the HQ. Choice of `Critical`, `Error`, `Warning`, `Information` or `Verbose`. If omitted, defaulted to `Verbose`.

---

**Cmdlets**

This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.

- `Set-LanguageSetting`
- `Set-CampaignApproval`
- `Set-LogSetting`

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

**Notes**

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Server\PSS-Modules.config`. Edit this file to change these defaults.

---

**CreatePortraitDatabases.ps1**

---

<b>Script name</b>	<code>CreatePortraitDatabases.ps1</code>
<b>Location</b>	<code>&lt;PSS Installation Folder&gt;\Administration</code>
<b>Purpose</b>	Creates the Portrait Shared Repository and Portrait Data Warehouse databases.

---

**Syntax**

```
CreatePortraitDatabases.ps1 [-DWDatabaseName] <String> [-PSRDatabaseName] <String> [-DBAccessUsername] <String> [-IntegratedSecurity] <String> [-DBUsername] <String> [-DBPassword] <String> [-DBServerName] <String> [-Sourceroot] <String>
```

where:

- **DWDatabaseName** Name of the Portrait Data Warehouse database
- **PSRDatabaseName** Name of the Portrait Shared Repository database
- **DBAccessUsername** This is the identity under which the Portrait Shared Services will access the Portrait Shared Repository and Datawarehouse databases.
- **IntegratedSecurity** Flag to be set to enable (true) or disable (false) connecting to the database using Windows authentication.
- **DBUsername** User name for connecting to the database. Mandatory if integrated security is NOT enabled.
- **DBPassword** Password for the user to connect to the SQL Server. Mandatory if integrated security is NOT enabled.
- **DBServerName** Name or IP of the database server.
- **Sourceroot** Root location of the database sql scripts. Uses install folder when not specified.

**cmdlets**

The `CreatePortraitDatabases.ps1` script makes use of two separate PowerShell cmdlets. If required, they can be run individually in place of the script.

- `New-DatabaseDW`: sets up the Portrait Data Warehouse database.
- `New-DatabasePSR`: sets up the Portrait Shared Repository database.

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

**Notes**

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Server\Db-Modules.config`. Edit this file to change these defaults.

**DialogueIntegration.ps1**

<b>Script name</b>	<code>DialogueIntegration.ps1</code>
<b>Location</b>	<code>&lt;PSS InstallationFolder&gt;\Administration</code>
<b>Purpose</b>	To enable or disable Portrait Dialogue on Portrait Shared Server.

### Syntax

```
DialogueIntegration.ps1 [[-WindowsAuthentication] <String>]
[-PSSUserAccountName] <String> [-PSSUserAccountPassword]
<String> [[-DialogueIntegrationEnabled] <String>] [[-Dialogue-
ServerURL] <String>] [[-DialogueInstanceName] <String>]
```

where:

- **WindowsAuthentication** specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- **PSSUserAccountName** is the user name for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **PSSUserAccountPassword** is the password for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **DialogueIntegrationEnabled** specifies whether to enable (`true`) or disable (`false`) Portrait Dialogue integration with Portrait Shared Server.
- **DialogueServerURL** is the URL of the Portrait Dialogue Server API. For example, `http://my-pd-server/mhdialogserverapi`.
- **DialogueInstanceName** is the name of the Portrait Dialogue instance.

---

### Cmdlets

The `DialogueIntegration.ps1` script makes use of one PowerShell cmdlet. If required, it can be run individually in place of the script.

- **Set-DialogueIntegration**: sets the integration with Dialogue.

**Note:** For more information on cmdlets, type `Get-Help <cmdletname>` in the Windows PowerShell console.

---

### Notes

- **Caution:** Running this script will re-start the Portrait Shared Server application pool. This has the effect of ending any open Portrait Shared Server sessions. Any users logged on to the HQ when the script is run will be forced to log in again.
- Any arguments not entered are read from `%programdata%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config`.
- This script enables or disables integration between Portrait Dialogue and PSS.

---

## ExplorerIntegration.ps1

---

<b>Script name</b>	ExplorerIntegration.ps1
<b>Location</b>	<InstallationFolder>\PST\Portrait Shared Server\Administration
<b>Purpose</b>	To enable or disable Portrait Explorer on Portrait Shared Server.

---



**Syntax**

```
ExplorerIntegration.ps1 [[-WindowsAuthentication] <String>]
[-PSSUserAccountName] <String> [-PSSUserAccountPassword]
<String> [[-ExplorerIntegrationEnabled] <String>] [[-ExplorerAnalyticsDataServerURL] <String>]
```

where:

- **WindowsAuthentication** specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- **PSSUserAccountName** is the user name for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **PSSUserAccountPassword** is the password for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **ExplorerIntegrationEnabled** allows you to enable (`true`) or disable (`false`) Portrait Explorer integration with PSS.
- **ExplorerAnalyticsDataServerURL** is the Analytics Data Server Server URL.

**Notes**

- Any arguments not entered are read from `%programdata%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config`.
- This script enables or disables integration between Portrait Explorer and PSS.

**ImportBusinessProcesses.ps1**

<b>Script name</b>	ImportBusinessProcesses.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	This script is used to retrieve business processes from external sources and store them into the Portrait Shared Repository.

**Syntax**

```
ImportBusinessProcesses.ps1 [[-WindowsAuthentication]
<String>] [-ImplName] <String> [-AdapterArgs] <object> [-
PSSUserAccountName] <String> [-PSSUserAccountPassword]
<String>
```

where:

- **WindowsAuthentication** specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- **PSSUserAccountName** is the user name for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **PSSUserAccountPassword** is the password for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **ImplName** is the name of the adapter (a string identifier that identifies the implementation class) that implements the logic to retrieve business processes from a particular source
- **AdapterArgs** is an array of objects that can be used to supply additional parameters to the adapter. The array contents could vary based on the adapter implementation.

---

**cmdlets**

The `ImportBusinessProcesses.ps1` script makes use of two separate PowerShell cmdlets. If required, they can be run individually in place of the script.

- `Get-BusinessProcesses` This cmdlet retrieves a set of business processes from a particular source.
- `Write-BusinessProcesses` This cmdlet saves a set of business processes into the Portrait Shared Repository.

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

**InstallReportServer.ps1**

---

<b>Script name</b>	<code>InstallReportServer.ps1</code>
<b>Location</b>	<code>&lt;PSS Installation Folder&gt;\Administration</code>
<b>Purpose</b>	To deploy the campaign performance reports to the SSRS report server.
<b>Syntax</b>	<pre>InstallReportServer.ps1 [-DBServerName] &lt;String&gt; [-DWDatabase- Name] &lt;String&gt;[-DBAccessUsername] &lt;String&gt; [-DBAccessPassword] &lt;String&gt; [-ReportServerURL] &lt;String&gt; [-ReportsURL] &lt;String&gt; [-ReportServerInstanceName] &lt;String&gt; [-ReportsDirectory] &lt;String&gt;</pre>

Parameters:

---

- DBServerName. Name of database server instance. If omitted, defaulted to (local).
- DWDatabaseName. Name of the Portrait Data Warehouse database. If omitted, defaulted to PortraitDW.
- DBAccessUsername. Account that SSRS report Data Sources use to connect to PDW database.
- DBAccessPassword. Account that SSRS report Data Sources use to connect to PDW database.
- ReportServerURL. SSRS Report Server URL. If omitted, defaulted to http://localhost/ReportServer.
- ReportsURL. SSRS Report Manager URL. If omitted, defaulted to http://localhost/Reports.
- ReportServerInstanceName. SQL Server instance name where the Report Server resides. If omitted, defaulted to MSSQLSERVER.
- ReportsDirectory is the name of the root folder to install Portrait Reports to. If omitted, defaulted to Portrait.

---

<b>Cmdlets</b>	<p>This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.</p> <ul style="list-style-type: none"> <li>• Install-ReportServer</li> </ul> <p><b>Tip:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdlet name&gt; -Detailed</code> in the Windows PowerShell console.</p>
<b>Notes</b>	<p>The default values used when script parameters are omitted are read from the <code>RSMModules.config</code> file under <code>%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services</code>. Edit this file to change these defaults.</p>

---

### InstallSharePoint.ps1

---

<b>Script name</b>	InstallSharePoint.ps1
<b>Location</b>	<installation folder>\PST\Portrait Shared Server\Administration
<b>Purpose</b>	To create a SharePoint site to hold HQ tasks.
<b>Syntax</b>	<pre>InstallSharePoint.ps1 [-SharePointServerURL] &lt;String&gt;</pre> <p>Parameters:</p> <ul style="list-style-type: none"> <li>-SharePointServerURL. URL of the SharePoint site that you wish to create. This URL must reside within a pre-existing SharePoint site collection. If omitted, defaulted to http://localhost/Portrait.</li> </ul>

---

**cmdlets** This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.

- Install-PSSSharePointSolution

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

**Notes**

This script should be run locally on the SharePoint server.

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\SPModules.config`. Edit this file to change these defaults.

---

**IOIntegration.ps1**

---

<b>Script name</b>	IOIntegration.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	To enable or disable Interaction Optimizer on Portrait Shared Server.
<b>Syntax</b>	<pre>IOIntegration.ps1 [[-WindowsAuthentication] &lt;String&gt;] [-PSSUserAccountName] &lt;String&gt; [-PSSUserAccountPassword] &lt;String&gt; [[-IOIntegrationEnabled] &lt;String&gt;] [[-IOServerURL] &lt;String&gt;]</pre>

---

where:

- `WindowsAuthentication` specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- `PSSUserAccountName` is the user name for connecting to Portrait Shared Services. Required only if `WindowsAuthentication` set to `false`.
- `PSSUserAccountPassword` is the password for connecting to Portrait Shared Services. Required only if `WindowsAuthentication` set to `false`.
- `IOIntegrationEnabled` specifies whether to enable (`true`) or disable (`false`) Interaction Optimizer integration with Portrait Shared Server.
- `IOServerURL` is the URL of the web server hosting the Interaction Optimizer web service API. For example, `http://my-io-server`.

---

**Cmdlets** The `IOIntegration.ps1` script makes use of one PowerShell cmdlet. If required, it can be run individually in place of the script.

- `Set-IOIntegration`: sets the integration with Interaction Optimizer.

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

---

<b>Notes</b>	The default values used when script parameters are omitted are read from the file %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config. Edit this file to change these defaults.
--------------	--

---

### RemovePortraitDatabases.ps1

---

<b>Script name</b>	RemovePortraitDatabases.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	Removes the Portrait Shared Repository and Portrait Data Warehouse databases from the database server.
<b>Syntax</b>	RemovePortraitdatabases.ps1 -DBServerName <string> -DWDatabaseNameForDrop <string> -PSRDatabaseNameForDrop <string> -IntegratedSecurity <string> -DBUsername <string> -DBPassword <string> -Sourceroot <string>

---

where:

- **DBServerName:** Name of the database server.
- **DWDatabaseNameForDrop:** Name of the Portrait Data Warehouse database to remove.
- **PSRDatabaseNameForDrop:** Name of the Portrait Shared Repository database to remove.
- **IntegratedSecurity:** Flag to be set to enable (true) or disable (false) connecting to the database using Windows authentication.
- **DBUsername:** User name for connecting to SQL server. Mandatory if IntegratedSecurity is false.
- **DBPassword:** Password for connecting to SQL Server. Mandatory if IntegratedSecurity is false.
- **Sourceroot:** Root location of the the database SQL scripts. Defaults to install folder when not specified.

---

<b>cmdlets</b>	Remove-PSSDatabases
	<b>Tip:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdlet name&gt; -Detailed</code> in the Windows PowerShell console.

---

<b>Notes</b>	The default values used when script parameters are omitted are read from the file %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\DbModules.config. Edit this file to change these defaults.
--------------	---

---

### RemoveReportServer.ps1

---

<b>Script name</b>	RemoveReportServer.ps1
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---

<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	To retract the campaign performance reports from the SSRS report server.
<b>Syntax</b>	<pre>RemoveReportServer.ps1 [-ReportServerURL] &lt;String&gt; [-Report-ServerInstanceName] &lt;String&gt; [-ReportsDirectory] &lt;String&gt;</pre> <p>where:</p> <ul style="list-style-type: none"> <li>• ReportServerURL is the URL for the Report Server.</li> <li>• ReportServerInstanceName is the SQL Server instance name where the Report Server resides.</li> <li>• ReportsDirectory is the name of the root folder containing the Portrait Reports installation you wish to remove.</li> </ul>
<b>Cmdlets</b>	<p>The UninstallReportServer.ps1 script makes use of one PowerShell cmdlet. If required, it can be run individually in place of the script.</p> <ul style="list-style-type: none"> <li>• UninstallReportServer.ps1: sets up PSS Reports in the server.</li> </ul> <p><b>Note:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdlet name&gt; -Detailed</code> in the Windows PowerShell console.</p>
<b>Notes</b>	The default values used when script parameters are omitted is read from the RSModules.config files under %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services. Edit this file to change these defaults.

RemoveSharePoint.ps1

<b>Script name</b>	RemoveSharePoint.ps1
<b>Location</b>	<InstallationFolder>\PST\Portrait Shared Server\Administration
<b>Purpose</b>	Retracts the Portrait Tasks SharePoint solution from SharePoint and deletes the Portrait Tasks SharePoint site.
<b>Syntax</b>	<pre>RemoveSharePoint.ps1 -SharePointServerURL &lt;String&gt;</pre> <p>where:</p> <ul style="list-style-type: none"> <li>• SharePointServerURL is the URL of the Portrait Tasks SharePoint site to delete.</li> </ul>
<b>Cmdlets</b>	<p>Uninstall-PSSSharePointSolution</p> <p><b>Note:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdletname&gt;</code> in the Windows PowerShell console.</p>

**Notes**

- Any parameters not supplied are read from %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\SPModules.config.
- This script should be run locally on the SharePoint server.

**RemoveWebsites.ps1**

<b>Script name</b>	RemoveWebsites.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	Removes the Portrait HQ and PSS web applications and the application pool used to run them from IIS.
<b>Syntax</b>	RemoveWebsites.ps1 [-IISWebsite] <String>  where:  • IISWebsite The IIS website under which the web application exists.
<b>cmdlets</b>	The RemoveWebsites.ps1 script makes use of three separate PowerShell cmdlets. If required, they can be run individually in place of the script.  • Remove-HQWebApplication: removes the web application for the HQ website. • Remove-PSSWebApplication: removes the web application for the PSS website. • Remove-PSSWebAppPool: removes the app pool used by the HQ and PSS web applications.  <b>Tip:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdlet name&gt; -Detailed</code> in the Windows PowerShell console.
<b>Notes</b>	The default values used when script parameters are omitted are read from the file %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config. Edit this file to change these defaults.

**ReportIntegration.ps1**

<b>Script name</b>	ReportIntegration.ps1
<b>Location</b>	<PSS Installation Folder>\Administration
<b>Purpose</b>	To enable or disable Portrait Reports on Portrait Shared Server.

**Syntax**

```
ReportIntegration.ps1 [[-WindowsAuthentication] <String>]
[[-PSSUserAccountName] <String>] [[-PSSUserAccountPassword]
<String>] [[-ReportIntegrationEnabled] <String>] [[-Report-
ServerWebServiceURL] <String>]
```

where:

- **WindowsAuthentication** specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to `true` to use the current Windows user account to log on to Portrait Shared Services.
- **PSSUserAccountName** is the user name for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **PSSUserAccountPassword** is the password for connecting to Portrait Shared Services. Required only if **WindowsAuthentication** set to `false`.
- **ReportIntegrationEnabled** is Whether to integrate SSRS reports with the HQ. Either `true` or `false`. If omitted, defaulted to `false`.
- **ReportServerURL** is SSRS Report Server URL. If omitted, defaulted to `http://localhost/ReportServer`.

---

**Cmdlets**

This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.

- `Set-ReportIntegration`

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

**Notes**

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config`. Edit this file to change these defaults.

---

SetPSSDatabaseConnections.ps1

---

**Script name**

SetPSSDatabaseConnections.ps1

---

**Location**

<PSS Installation Folder>\Administration\

---

**Purpose**

Sets Portrait Shared Server's database connection details to the Portrait Shared Repository and Portrait Data Warehouse databases.

---

**Syntax**

```
SetPSSDatabaseConnections.ps1 [[-PSRDatabaseName] <String>]
[[-DWDDatabaseName] <String>] [[-DBUsername] <String>] [[-DB-
Password] <String>] [-DBServerName] <String> [-IntegratedSe-
curity] <String>
```

Parameters:

-PSRDatabaseName. Name of the Portrait Shared Repository database. If omitted, defaulted to PortraitPSR.

---



-DWDatabaseName. Name of the Portrait Data Warehouse database. If omitted, defaulted to PortraitDW.

-DBUsername. User name for connecting to SQL server. Mandatory if Integrated-Security is false.

-DBPassword. Password for connecting to SQL Server. Mandatory if Integrated-Security is false.

-DBServerName. Name of database server instance. If omitted, defaulted to (local).

-IntegratedSecurity. Flag to be set to enable (true) or disable (false) connecting to the database using Windows authentication..

---

#### cmdlets

This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.

- Set-ConnectionDW
- Set-ConnectionPSR

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

---

#### Notes

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\DbModules.config`. Edit this file to change these defaults.

---

#### SetupWebsites.ps1

---

<b>Script name</b>	SetupWebsites.ps1
<b>Location</b>	<PSS Installation Folder>\Administration\
<b>Purpose</b>	To add the Portrait Shared Services and HQ web applications to IIS.

---

**Syntax**

```
SetupWebsites.ps1 [-PSSWebAppPoolAccountDomain] <String> [-PSSWebAppPoolAccountName] <String> [-PSSWebAppPoolAccountPassword] <String> [[-IISWebsite] <String>]] [[-HQWebApplicationPhysicalPath] <String>] [[-PSSWebApplicationPhysicalPath] <String>]
```

**Parameters:**

- PSSWebAppPoolAccountDomain. The account domain for the app pool identity.
- PSSWebAppPoolAccountName. The account name for the app pool identity.
- PSSWebAppPoolAccountPassword. The account password for the app pool identity.
- IISWebsite. The IIS website under which the web application exists. If omitted, defaulted to Default Web Site.
- HQWebApplicationPhysicalPath. The physical path for the web application to be created. If omitted, defaulted to <PSS Installation Folder>\Marketing HQ.
- PSSWebApplicationPhysicalPath. The physical path for the web application to be created. If omitted, defaulted to <PSS Installation folder>\Portrait Shared Services.

---

**cmdlets**

The SetupWebsites.ps1 script makes use of five separate PowerShell cmdlets. If required, they can be run individually in place of the script.

- New-PSSWebAppPool
- New-HQWebApplication
- New-PSSWebApplication
- Set-HQWebApplicationSettings
- Set-PSSWebApplicationSettings

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Details` in the Windows PowerShell console.

---

**Notes**

The default values used when script parameters are omitted are read from the file %PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Server\PSS-Modules.config. Edit this file to change these defaults.

This script does not validate that the account credentials you provide are correct. Take care when entering this information.

---

SharepointIntegration.ps1

---

<b>Script name</b>	SharepointIntegration.ps1
<b>Location</b>	<InstallationFolder>\PST\Portrait Shared Server\Administration

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<b>Purpose</b>	To enable or disable Portrait Tasks on Portrait Shared Server.
<b>Syntax</b>	<pre>SharePointIntegration.ps1 [[-WindowsAuthentication] &lt;String&gt;] [-PSSUserAccountName] &lt;String&gt; [-PSSUserAccountPassword] &lt;String&gt; [[-SharePointIntegrationEnabled] &lt;String&gt;] [[-SharePointServerURL] &lt;String&gt;]]</pre> <p>where:</p> <ul style="list-style-type: none"> <li>• <code>WindowsAuthentication</code> specifies whether or not to use Windows authentication to log on to Portrait Shared Services. Set to <code>true</code> to use the current Windows user account to log on to Portrait Shared Services.</li> <li>• <code>PSSUserAccountName</code> is the user name for connecting to Portrait Shared Services. Required only if <code>WindowsAuthentication</code> set to <code>false</code>.</li> <li>• <code>PSSUserAccountPassword</code> is the password for connecting to Portrait Shared Services. Required only if <code>WindowsAuthentication</code> set to <code>false</code>.</li> <li>• <code>SharePointIntegrationEnabled</code> is the flag to be set to enable (<code>true</code>) or disable (<code>false</code>) SharePoint integration with PSS.</li> <li>• <code>SharePointServerURL</code> is the SharePoint Server URL.</li> </ul>
<b>Cmdlets</b>	<p>The <code>SharePointIntegration.ps1</code> script makes use of one PowerShell cmdlet. If required, it can be run individually in place of the script.</p> <ul style="list-style-type: none"> <li>• <code>Set-SharePointIntegration-</code> sets the integration with SharePoint.</li> </ul> <p><b>Note:</b> For more information on cmdlets, type <code>Get-Help &lt;cmdletname&gt;</code> in the Windows PowerShell console.</p>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• Any arguments not entered are read from <code>%programdata%\Pitney Bowes Software\Portrait Shared Services\PSSModules.config</code>.</li> <li>• This script enables <i>or</i> disables integration between SharePoint and PSS.</li> </ul>

### SSISIntegration.ps1

<b>Script name</b>	SSISIntegration.ps1
<b>Location</b>	<PSS Installation Folder>\Administration\
<b>Purpose</b>	To configure and schedule the Portrait Data Warehouse refresh SSIS package.
<b>Syntax</b>	<pre>SSISIntegration.ps1 [-DBServerName] &lt;String&gt; [-PSRDatabaseName] &lt;String&gt; [-DWDatabaseName] &lt;String&gt; [-IntegratedSecurity] &lt;String&gt; [-DBUsername] &lt;String&gt; [-DBPassword] &lt;String&gt; [-DBAccessUsername] &lt;String&gt; [-DBAccessPassword] &lt;String&gt; [-CredentialName] &lt;String&gt; [-ProxyName] &lt;String&gt; [-IOIntegrationEnabled] &lt;String&gt; [-IODBServerName] &lt;String&gt; [-IODatabaseName] &lt;String&gt; [-IOIntegratedSecurity] &lt;String&gt; [-IODBUser-</pre>

```
name] <String> [-IODBPassword] <String>[-DialogueIntegratio-
nEnabled] <String> [-DialogueDBServerName] <String> [-Dia-
logueDatabaseName] <String> [-DialogueIntegratedSecurity]
<String> [-DialogueDBUsername] <String> [-DialogueDBPassword]
<String> [-PDIsOracle] <String> [-DialogueOracleServiceName]
<String>
```

**Parameters:**

- **DBServerName** is the name or IP of the database server. If omitted, defaulted to (local).
  - **PSRDatabaseName** is the name of the Portrait Shared Repository database. If omitted, defaulted to PortraitPSR.
  - **DWDatabaseName** is the name of the Portrait Data Warehouse database. If omitted, defaulted to PortraitDW.
  - **IntegratedSecurity**. Whether the SSIS package uses Windows Authentication to connect to the PSR and PDW. If omitted, defaulted to true.
  - **DBUsername**. Account the SSIS package uses to connect to the PSR and PDW. **Mandatory** if **IntegratedSecurity** is false.
  - **DBPassword**. Password of account the SSIS package uses to connect to the PSR and PDW. **Mandatory** if **IntegratedSecurity** is false.
  - **DBAccessUsername** is the account the script will use to connect to the database server so as to add a SQL Agent job.
  - **DBAccessPassword** is the password of the account the script will use to connect to the database server so as to add a SQL Agent job.
  - **CredentialName** is the name of the security credential that the DW Refresh SSIS package will run under in SQL Server Agent. If omitted, defaulted to DW\_Credential.
  - **ProxyName** is the name of the proxy that the SQL Server Agent will use to access the specified credential. If omitted, defaulted to DW\_Proxy.
  - **IOIntegrationEnabled**. Whether Interaction Optimizer data is to be loaded into the Portrait Data Warehouse. If omitted, defaulted to false.
  - **IODBServerName**. The Portrait Interaction Optimizer database server name. **Mandatory** if **IOIntegrationEnabled** is true. If omitted, defaulted to (local).
  - **IODatabaseName**. The Portrait Interaction Optimizer database name. **Mandatory** if IO integration is enabled.
  - **IOIntegratedSecurity**. Whether the SSIS package uses Windows Authentication to connect to the IO database. If omitted, defaulted to true.
  - **IODBUsername**. Account the SSIS package uses to connect to the IO database. **Mandatory** if **IOIntegratedSecurity** is false.
  - **IODBPassword**. Password of account the SSIS package uses to connect to the IO database. **Mandatory** if **IOIntegratedSecurity** is false.
  - **DialogueIntegrationEnabled**. Whether Portrait Dialogue data is to be loaded into the Portrait Data Warehouse. If omitted, defaulted to false.
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- `DialogueDBServerName`. The Portrait Dialogue database server name. **Mandatory** if `DialogueIntegrationEnabled` is `true`.
- `DialogueDatabaseName`. The Portrait Dialogue database name. **Mandatory** if `DialogueIntegrationEnabled` is `true`.
- `DialogueIntegratedSecurity`. Whether the SSIS package uses Windows Authentication to connect to the IO database. If omitted, defaulted to `true`.
- `DialogueDBUsername`. The user name to connect to the Portrait Dialogue database when using SQL authentication. **Mandatory** if `DialogueIntegratedSecurity` is `true`.
- `DialogueDBPassword`. The password to connect to the Portrait Dialogue database when using SQL authentication. **Mandatory** if `DialogueIntegratedSecurity` is `true`.
- `PDIIsOracle`. Whether using an Oracle database server to host the Portrait Dialogue database. If omitted, defaulted to `false`.
- `DialogueOracleServiceName`. The name of the Oracle service. **Mandatory** if `PDIIsOracle` is `true`.

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**cmdlets**

This script uses the following PowerShell cmdlets. If required, these cmdlets can be run individually in place of the script.

- `Set-DWPopulateConfig`
- `Add-DWPopulateJob`

**Tip:** For more information on cmdlets, type `Get-Help <cmdlet name> -Detailed` in the Windows PowerShell console.

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**Notes**

The default values used when script parameters are omitted are read from the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\SSISModules.config`. Edit this file to change these defaults.

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