

Portrait Foundation



Quick Install Guide

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 **Pitney Bowes**
Software



Portrait Foundation Quick Install Guide

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Portrait Software is now part of [Pitney Bowes Software Inc.](http://www.pitneybowes.com)

Portrait Software enables organizations to engage with each of their customers as individuals, resulting in improved customer profitability, increased retention, reduced risk, and outstanding customer experiences. This is achieved through a suite of innovative, insight-driven applications which empower organizations to create enduring one-to-one relationships with their customers.

Portrait Software was acquired in July 2010 by Pitney Bowes to build on the broad range of capabilities at Pitney Bowes Business Insight for helping organizations acquire, serve and grow their customer relationships more effectively. The Portrait Customer Interaction Suite combines world leading customer analytics, powerful inbound and outbound campaign management, and best-in-class business process integration to deliver real-time customer interactions that communicate precisely the right message through the right channel, at the right time.

Our 300 + customers include industry-leading organizations in customer-intensive sectors. They include 3, AAA, Bank of Tokyo Mitsubishi, Dell, Fiserv Bank Solutions, Lloyds Banking Group, Merrill Lynch, Nationwide Building Society, RACQ, RAC WA, Telenor, Tesco Bank, T-Mobile, Tryg and US Bank.

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For more information please visit: <http://www.pitneybowes.co.uk/software/>

UK

Portrait Software
The Smith Centre
The Fairmile
Henley-on-Thames
Oxfordshire, RG9 6AB, UK

Email: support@portraitsoftware.com
Tel: +44 (0)1491 416778
Fax: +44 (0)1491 416601

America

Portrait Software
125 Summer Street
16th Floor
Boston, MA 02110
USA

Email: support@portraitsoftware.com
Tel: +1 617 457 5200
Fax: +1 617 457 5299

Norway

Portrait Software
Portrait Million Handshakes AS
Maridalsveien. 87
0461 Oslo
Norway

Email: support@portraitsoftware.com
Tel: +47 22 38 91 00
Fax: +47 23 40 94 99

About this document

Purpose of document

This document should be used when installing Portrait Foundation in a single server setup for demonstration or evaluation purposes.

Intended audience

Software developers and pre-sales professionals looking to install Portrait Foundation quickly on a single box for demonstration or evaluation purposes.

Related documents

Database Setup Guide

Installation Guide

Repository Manager User Guide

Software release

Portrait Foundation 4.4 Update 3 or later.

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1 Introduction

The Portrait Foundation installation programs have been built to handle the installation of Portrait Foundation in a number of different environments, from full multi-tiered production environments to single box environments for evaluation and demonstration purposes. Full installation instructions can be found in the Portrait Foundation Installation Guide available on the release media.

This guide should be used for simple single box installs for evaluation and demonstration purposes. A single box install may mean that the computer where Portrait Foundation is to be installed has Microsoft SQL server installed or is connected to a Microsoft SQL server through a network. These instructions assume that Microsoft SQL server is installed on the local computer for ease of explanation.

Refer to the Portrait Foundation release notes for the pre-requisite software requirements. Remember that your single machine is acting as a Database, Process and Web server, and you must have system (local and domain) administrative privileges.

There are 4 basic steps to a Portrait Foundation install:

- Database setup
- Core software install and system setup
- Implementation install
- Repository setup

When the 4 steps are complete, the user will be in a position to run all of the Portrait Foundation pre-configured applications in addition to the Portrait Foundation Configuration Suite and Repository Manager. As the associated Portrait Foundation workspace has been pre-deployed to the Portrait Foundation database, a separate workspace deployment is only necessary if configuration changes are made.

Please ensure that all previous versions of the Portrait Foundation software are uninstalled from your machine before following any steps in this document.

2 Database install

Run the Portrait Foundation database setup wizard, **FdnDbSetup.exe** from **\Software\Installsets\Database** on the release media. For further details please refer to the Database Setup Guide.

- 1 At the welcome screen click **Next**.
- 2 Select "Restore from backup" and click **Next**.
- 3 Select the relevant "Fully Deployed" database backup zip file from **\Software\Database_Baseline** on the release media and click **Next**.
- 4 Select the relevant SQL Server, enter the name of the new database (e.g. **Portrait_Database**) and click **Next**. It's recommended to use Windows Authentication.

Portrait Foundation Database Setup - 44.0.0.120

Create a new database

Please enter the database details

Database server

Database name

Use Windows Authentication

SQL Server Authentication

User name

Password

< Back Next > Cancel

- 5 Leave the default database data and log file locations and click **Next**.
- 6 When the confirmation screen is displayed, click **Next**.
- 7 A progress bar indicates the beginning of the database creation process. When installation is complete, a confirmation page appears. Please check the log before clicking **Finish**.

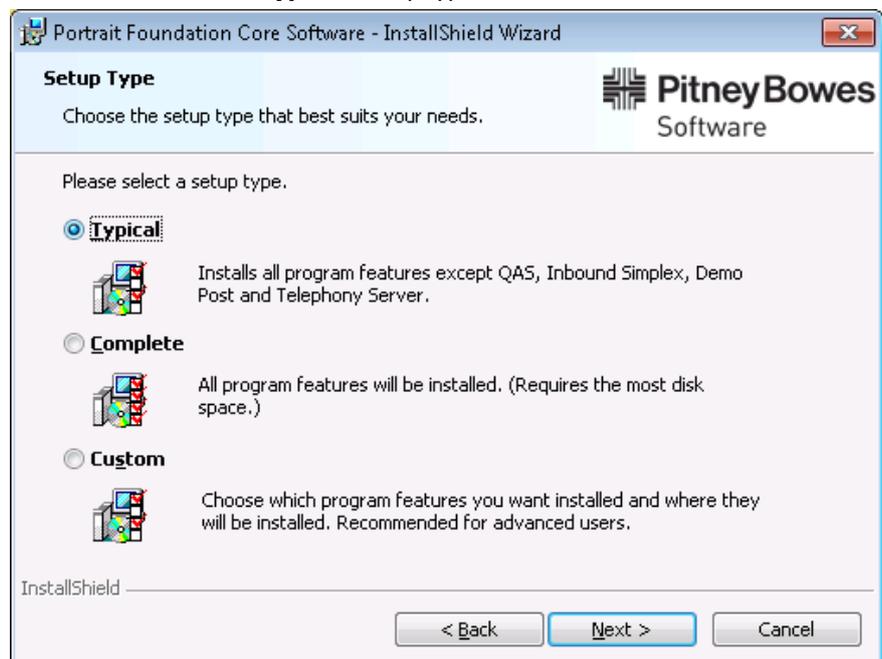
3 Core software

3.1 Installation

The Core Software install can be found in **\Software\Installsets\Core Software** on the release media. Please refer to the *Installation Guide* for more information on setting up pre-requisite software like IIS.

Double click on **setup.exe** to start the core software installation.

- 1 Click **Next** to confirm the install version.
- 2 The next screen prompts for a location to install the core software. Leave the default location and click **Next**.
- 3 Leave the default **"Typical"** setup type and click **Next**.



- 4 Click **Install** to complete the core software install.

3.2 System setup

Once complete, the System Setup tool should be launched. If not it can be run from the Windows Start menu under **All Programs > Portrait Foundation**.

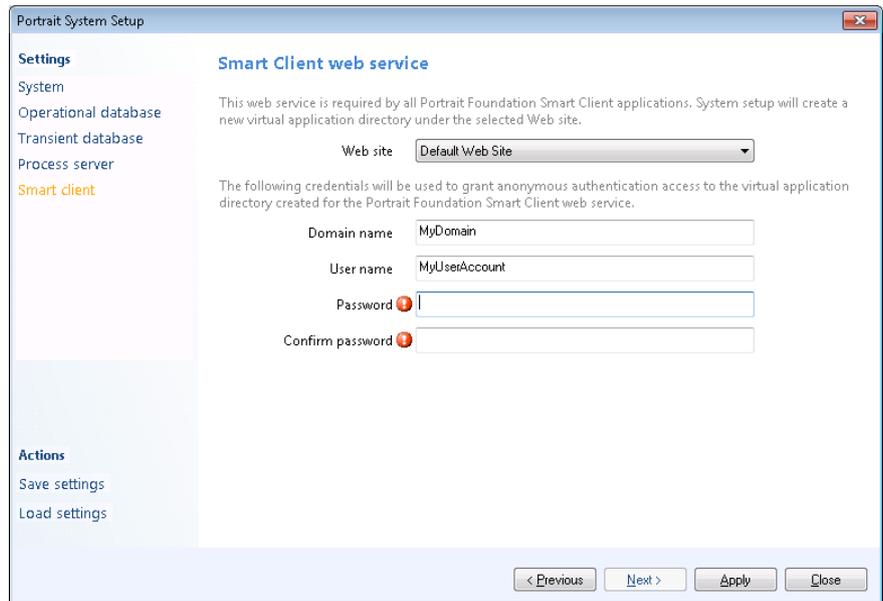
Enter the relevant **System** settings.

The screenshot shows the 'Portrait System Setup' window with the 'System' tab selected. The main heading is 'Portrait Foundation system'. Below this, there is a text instruction: 'Please give a name to this system. The name must start with a letter and contain alphanumeric characters but no spaces. If the Portrait Telephony Server is installed on the same machine as the Process Server then only one system can be created. Otherwise up to four "multi-tenant" systems can be created. An existing system can be removed by selecting the System name from the list, ticking Remove and clicking Apply.' A 'System name' dropdown menu is set to 'MyPortrait' with a 'Remove' checkbox. Below this, a note states: 'The following credentials will be used to access the Portrait Foundation services for the system.' There are four input fields: 'Domain name' (MyDomain), 'User name' (MyUserAccount), 'Password', and 'Confirm password'. At the bottom left, under 'Actions', are 'Save settings' and 'Load settings' buttons. At the bottom right are '< Previous', 'Next >', 'Apply', and 'Close' buttons.

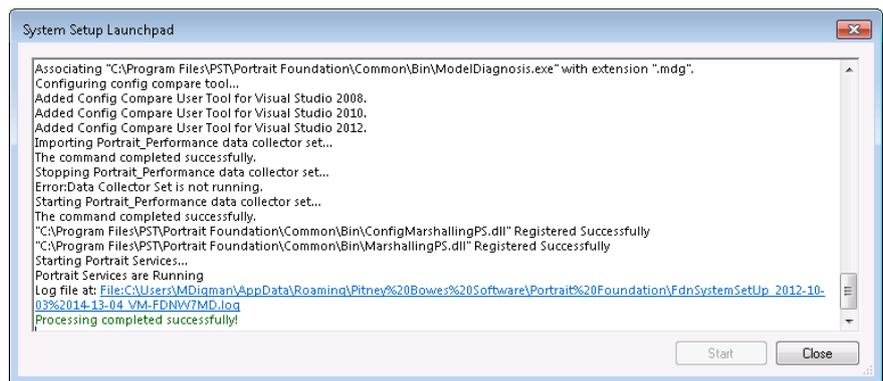
Enter the relevant **Operation database** settings.

The screenshot shows the 'Portrait System Setup' window with the 'Operational database' tab selected. The main heading is 'Operational database'. Below this, there is a text instruction: 'You must identify the Portrait Foundation operational database that will be used by the system.' There are two dropdown menus: 'Database server' and 'Database name'. Below these is a checked checkbox for 'Use Windows authentication'. Underneath are 'User name' and 'Password' input fields. At the bottom left, under 'Actions', are 'Save settings' and 'Load settings' buttons. At the bottom right are '< Previous', 'Next >', 'Apply', and 'Close' buttons.

Then skip to the **Smart client** settings, enter the relevant details and click **Apply**.



On the System Setup Lanuchpad click **Start**.



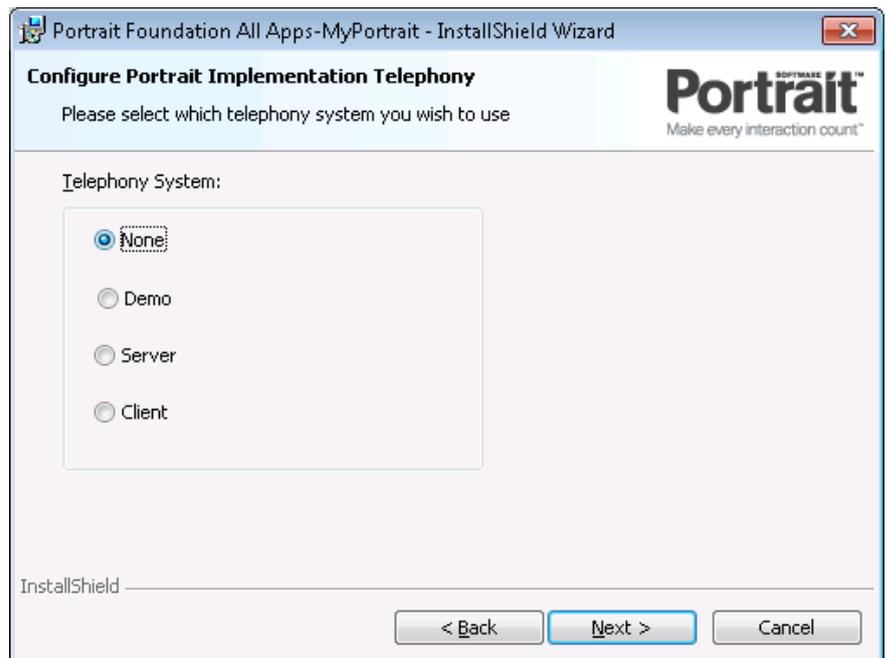
On successful completion, click **Close** and then Close the System Setup tool.

4 All Apps implementation install

The All Applications implementation install can be found in **\Software\Installsets\AllApplications** on the release media.

Double click on **All Applications.msi** to launch the implementation install.

- 1 After the welcome screen select **Next**.
- 2 Accept the default system name "**MyPortrait**" and click **Next**.
- 3 For the Telephony system, leave "**None**" as the default and click **Next**. If you wish to simulate a telephony environment then you should select "**Demo**" instead.



- 4 When prompted for the Setup Type, leave "**Complete**" as the default and click **Next**.
- 5 Confirm the default web site settings and click **Next**.
- 6 Enter the relevant user credentials and click **Next**.
- 7 Click **Install** to confirm installation of the All Applications implementation.
- 8 Click **Finish** to close the All Applications implementation install.

4.1 Launching the applications

The Portrait Foundation applications can be started using the "**FdnApplicationUrls.html**" web page provided on the release media in **\Software\Tools**. When opening the Contact Centre for the first time, use the Agent name of **amc1** and password of **amc1**. Other Agents can be created using the Agent Manager Application.

5 Repository setup

This section lists the steps required to create a new repository and to make it ready to use.

The source control provider is assumed to be Portrait Snapshots. If a different source control provider is used, then a view needs to be set up first under that source control provider.

First, create directories which will contain the Portrait Master Repository and Portrait Snapshot. If you would like to keep the master repository local (recommended for demos and evaluation purposes) this would typically be:

- C:\Portrait\Repository\Master
- C:\Portrait\Repository\Snapshot

5.1 Create new repository

- 1 Open the Portrait Repository Manager. From the Start menu select All Programs > Portrait Foundation > MyPortrait > Repository Manager
As there is no connection currently set up, the Repository Properties dialog is displayed.
- 2 Click **Cancel** at the Repository Properties dialog.
- 3 At the warning dialog, click **OK**.
- 4 Select **New repository** from the Repository menu.
- 5 Browse to the folder that you wish to contain the new repository (as suggested in *Repository Setup* section above).
- 6 Provide the name of the owner of the new repository. Typically this is your organisation or business unit that is going to own all the configuration assets held within your repository.
- 7 Provide the name and password of a Portrait Foundation user with administrator privileges that you will subsequently use to log on to the repository.

Figure 1 - New repository dialog



5.2 Connect to the repository

- 1 Select **Log on** from the Repository menu. This will display the **Settings** dialog.
- 2 Select **Portrait Snapshots** as the source control provider you wish to use for your repository.

- 3 In the **Master** field, use the **Browse** button to go to the folder that you specified in *Create new repository* step 6, on page 12. Select the .psconfig file in this folder.
- 4 In the **Snapshot** field, use the **Browse** button to enter the location of a folder local to your machine in *Create new repository* step 6, on page.12. This folder must not be beneath the **Project path**.

Figure 2 - Repository properties dialog



- 5 The **Log on** dialog is now displayed.
- 6 Select Portrait authentication. Enter the user name and password you supplied as the administrator user name and password in *Create new repository* step 8, on page 12.

Figure 3 - Portrait Logon dialog



5.3 Importing packages

- 1 Select **Import** from the Repository menu.
- 2 Browse to the **Repository** folder on the release media that contains all the Portrait Foundation Repository packages.
- 3 Select the Portrait_Platform.cab file and then select **Open**.
- 4 When the import is 100% complete press **OK**.
- 5 Select the Portrait_Platform_Demonstration.cab file and then select **Open**.
- 6 When the import is 100% complete press **OK**.