Sitecore EI 1.0 for CMS & DMS 6.6

Targit for Engagement Intelligence - Installation Guide

Installation guide for administrators and developers

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Chapter 1

Introduction

This document describes the steps necessary to deploy and configure Targit for Engagement Intelligence on Sitecore CMS.

For more detailed information on the installation of TARGIT components refer to the *TARGIT installation and configuration guide*. This document is also available on the Sitecore Developer Network (SDN).

This document contains the following chapters:

- **Chapter 1 — Introduction**
  This section includes an introduction to the document and an overview of the Engagement Intelligence architecture.

- **Chapter 2 — Installation Steps**
  This section includes all the steps required to install and configure Targit for Engagement Intelligence on Sitecore CMS.

- **Chapter 3 — Troubleshooting**
  This section includes tips and tricks to solve problems that you may encounter during installation.

1.1 Architecture Overview

Targit for Engagement Intelligence recommended configuration:
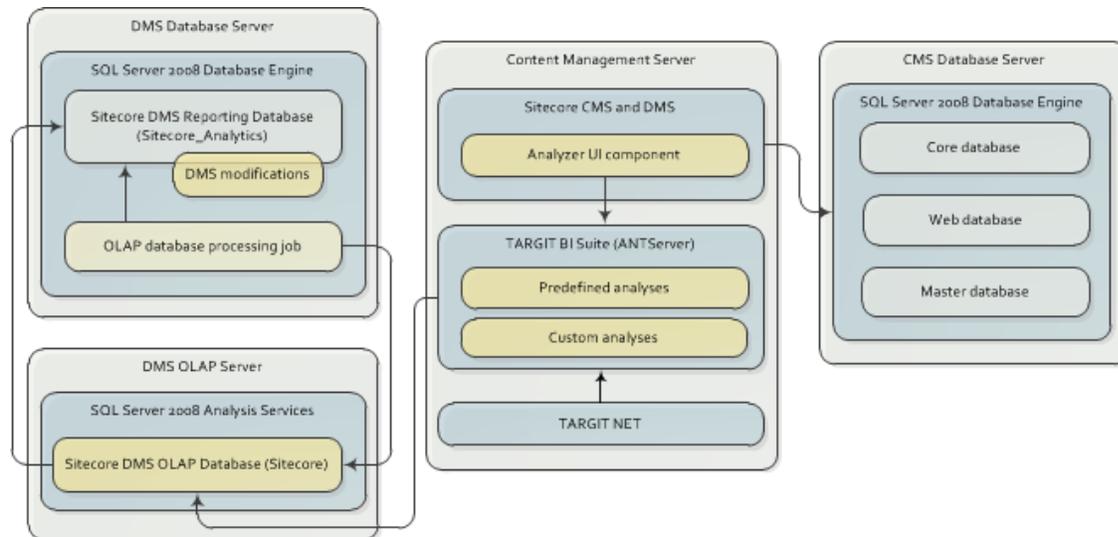
Server 1: CMS Database Server

- Microsoft SQL Server Database Engine (2008 or higher).
  - o Core, Master and Web databases.

Server 2: DMS Database Server

- Microsoft SQL Server Database Engine (2008 or higher).
  - o Sitecore DMS analytics or reporting database with modifications from `engagement_intelligence_schema.sql` script.
  - o OLAP database processing job set up in SQL Server Agent.

Server 3: DMS OLAP Server

- Microsoft SQL Server Analysis Services (2008 or higher).
  - o Sitecore DMS OLAP database.

Server 4: Content Management Server

- Sitecore CMS instance with DMS.
  - o With Engagement Intelligence Datamart installed.
- TARGIT BI Suite.
  - o Sitecore Analyses and customizations deployed to the ANTServer `TARGIT Settings` folder.
- TARGIT NET.
  - o Exposes web user interface that receives data from the TARGIT ANTServer.

1.2   Prerequisites

Before you can install Targit for Engagement Intelligence, you must first install and configure the following software:

- Engagement Intelligence Datamart

For more information on how to do this, see the *Engagement Intelligence Datamart Installation Guide*.

Note
Ensure that you have the appropriate licenses installed for *Sitecore Engagement Intelligence* and TARGIT.

Chapter 2

Installation Steps

This section describes the steps that you need to follow to configure and install Targit for Engagement Intelligence.

Perform all the installation steps in the same order as described in this document.

- The Installation Package

- Installing the TARGIT BI Suite

- Installing and Configuring TARGIT NET

2.1 The Installation Package

The installation package is a zip archive that contains the following:

TARGIT installation files:

- `TARGITBISuite.msi` – the installation package for TARGIT BI Suite. This runs an installation wizard for the TARGIT Windows client and TARGIT ANTServer.

- `TARGITNET.msi` – the installation package for TARGIT NET. This runs a wizard to install the web version of TARGIT.

- `TARGIT Settings` folder – this is the directory that contains the TARGIT analyses and accompanying resource files predefined by Sitecore.

Sitecore installation package:

- `Sitecore Engagement Intelligence 1.0.0.zip` – this is the Sitecore module installation package that enables you to launch TARGIT NET from the Sitecore Desktop.

Extract the zip archive into a directory. You will need to access these files during the installation process.

2.2 Installing the TARGIT BI Suite

Execute the following steps to install the TARGIT BI Suite:

1. Run the `TARGITBISuite.msi` file. In the TARGIT installation wizard, accept all the default selections and settings.

2. Close the TARGIT BI Suite (which starts automatically after running the msi installation file).

3. Copy the contents of the `TARGIT Settings` folder from the installation package to the *ANTServer* directory.

   The default TARGIT installation directory for this is:

   ```
   C:\Program Files (x86)\TARGIT\ANTServer
   ```

   Note
   Windows Explorer may show a warning that the destination directory already contains items with the same name. If prompted, click *Yes* to confirm that you want to merge these items.

For more detailed instructions on installing and configuring the *TARGIT BI Suite*, see the *TARGIT installation and configuration guide*. This document is available on the Sitecore Developer Network (SDN).

2.2.1 Configuring a Connection to the OLAP Database

To configure a connection to the OLAP database:

1. Start the *TARGIT Management Studio* from the Windows Start menu. Select the *localhost* server instance and then click **Manage Server**.
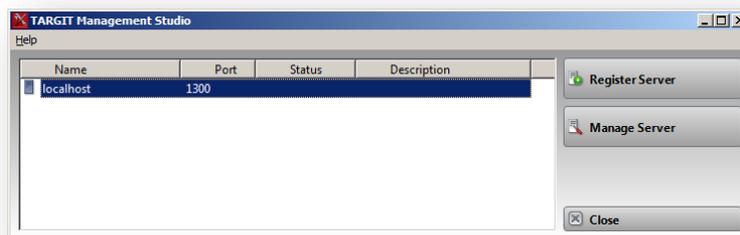
2. In the *TARGIT Management Studio*, left hand navigation pane, click **Connections**.

3. Right-click anywhere in the right hand side of the window and select **Add** to open the TARGIT **Connection Properties** wizard.

4. In the **Connection Properties** wizard, **Connection Type** page, select *Multi-Dimensional Database*.

5. On the **Provider** page, select *MS Analysis Services 2008*.

6. On the **Name** page, enter *Sitecore* as the connection name. If you wish, also enter a description for the connection and then click **Next**.

7. In the **Microsoft Analysis Services 2008 Connection String** page, configure the following settings:

Field	Description	Default Value
Server	Name or IP address of the SQL Server Analysis Services instance that contains your OLAP database.	*localhost*
Database	Name of your OLAP database.	*Sitecore*
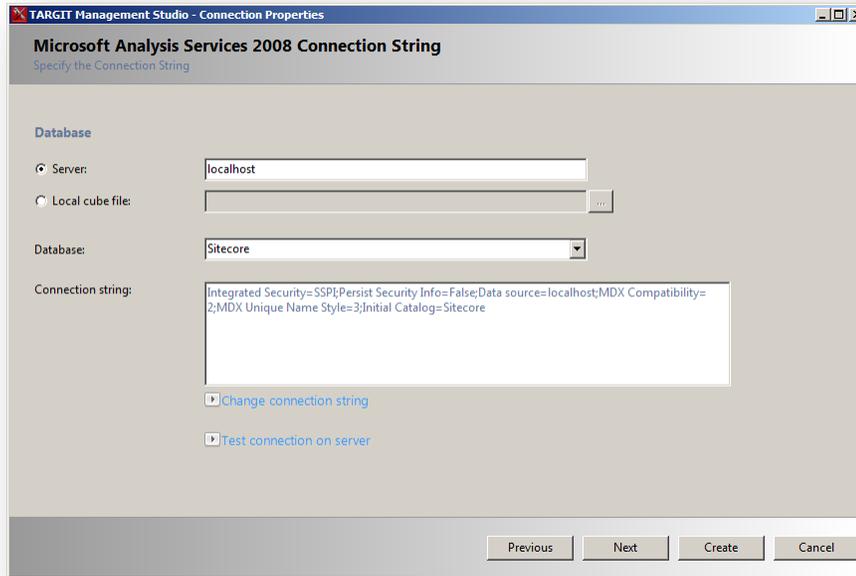
8. Click **Test connection on server** to verify the connection settings and then click **Next**.

9. On the **Additional Settings** page, you can set additional connection properties. We recommend that you leave these settings unchanged. Click **Create**.
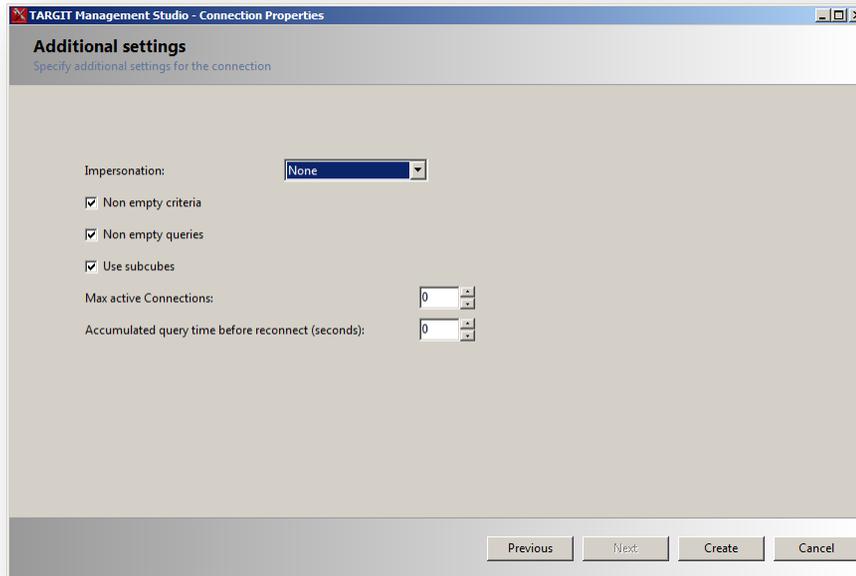
10. Close the *TARGIT Management Studio*.

11. To verify your configuration, open *TARGIT* from the Windows Start menu and connect to *localhost*. Click the key icon to open TARGIT.
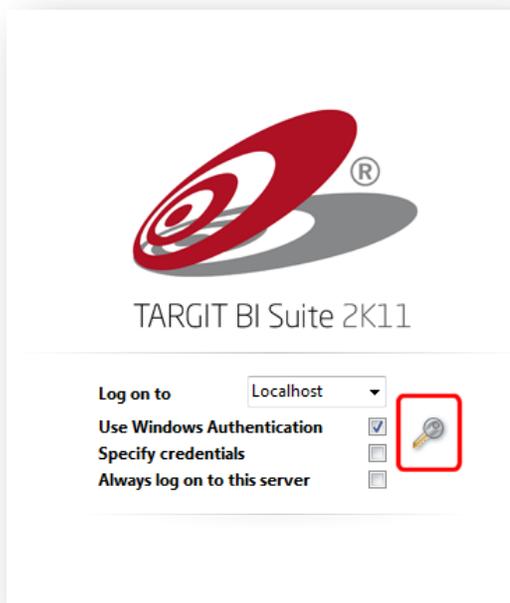
If the connection is successful, you can use the navigation bar at the top of the client window in TARGIT to open the analyses that are predefined by Sitecore.
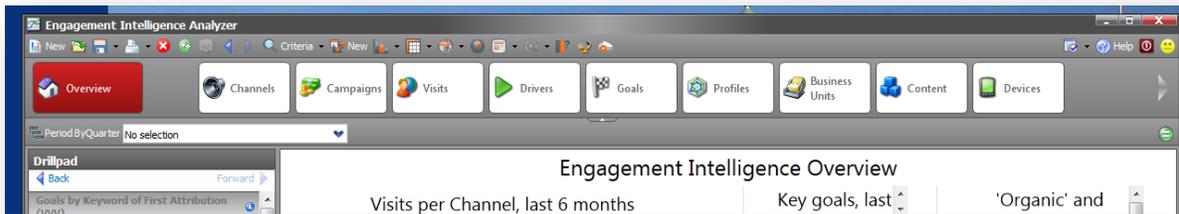
If the Sitecore navigation bar fails to appear in your TARGIT installation, see the troubleshooting section *Adding a Custom Analyzer Navigation Bar*.

2.3 Installing and Configuring TARGIT NET

TARGIT NET is the web client version of the TARGIT Analyzer.

There are two ways to install and run TARGET NET:

- Web Browser – Enter a server or domain URL directly into a web browser window.

- Sitecore Desktop – Open TARGET NET from the Sitecore Desktop Start menu. To do this, you need to install and configure the *Sitecore Engagement Intelligence module*.

To install TARGIT NET, first run the `TARGITNET.msi` installation file.

For instructions on how to install and configure TARGIT NET using the installation wizard, see the *Installing TARGIT NET* section of the *TARGIT installation and configuration guide.*

To verify the installation, use a web browser to open the URL you specified for your TARGIT web site.

2.3.1 Installing the Sitecore Module

To install the *Sitecore Engagement Intelligence module*:

1. Log in to the Sitecore Desktop using an administrator account.
2. Click **Start**, **Development Tools** and then click **Installation Wizard**.
3. In the Installation Wizard, upload the *Sitecore Engagement Intelligence 1.0.0.zip* package.
4. Click **Next** to accept the license agreement.
5. Click **Next** to begin the installation process.
6. If you see a message *Item being installed already exists in database*, choose *Overwrite* and press the *Apply to all* button.
7. Follow the steps in the Installation Wizard and accept all the default settings.

2.3.2 Configuring the Sitecore Module

To configure the *Sitecore Engagement Intelligence module*:

1. After the wizard has completed, switch to the **core** database using the **Database Selector** in the bottom right hand corner of the Sitecore Desktop.
2. In the Content Editor, content tree, locate the **Engagement Intelligence** item:
   `Sitecore/content/Applications/Analytics/Engagement Intelligence`

3. In the **Engagement Intelligence** item, **Data** section, **Application** input field, enter the URL of your TARGIT NET installation.
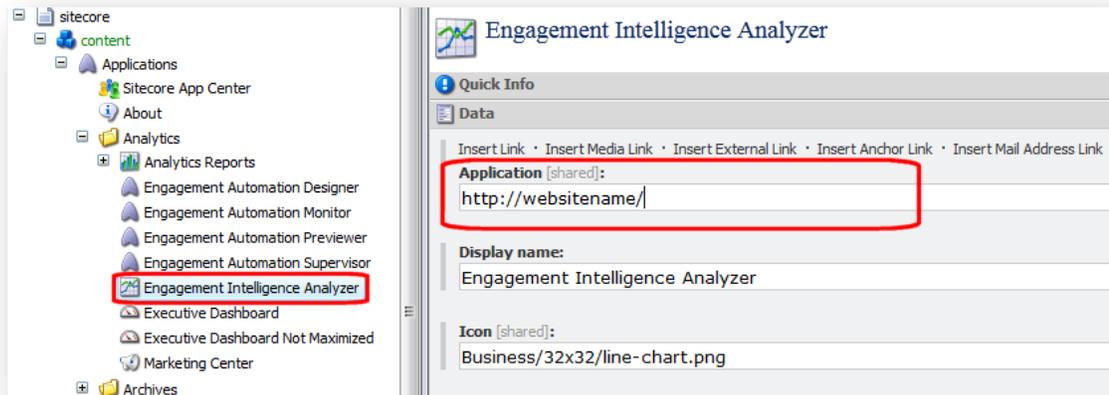
Note
Enter the external domain name or IP address of the server where TARGIT NET is installed. Do not enter *http://localhost/*.

In the Sitecore Desktop, the module installation adds a new menu item to the Sitecore Start menu called *Engagement Intelligence*:

4. To verify the installation, click the Sitecore start button and then click *Engagement Intelligence* to open the module.

Chapter 3

Troubleshooting

This chapter includes some tips and tricks to solve common problems that you may encounter during the installation process.

- TARGET NET IIS Website Configuration

- Adding a Custom Analyzer Navigation Bar

3.1 TARGET NET IIS Website Configuration

In the TARGIT NET installation wizard, if you choose the option *New Web Site* for your TARGIT installation, a new site is automatically added in IIS (Internet Information Server) called TARGITNET.

In IIS, before you run TARGIT NET, ensure that you have specified a path to your website and have enabled Windows authentication.

Specifying a path to the TARGIT website

In IIS, *Edit Site*, click *Basic Settings* then browse to the physical path of your TARGET NET website and click OK.
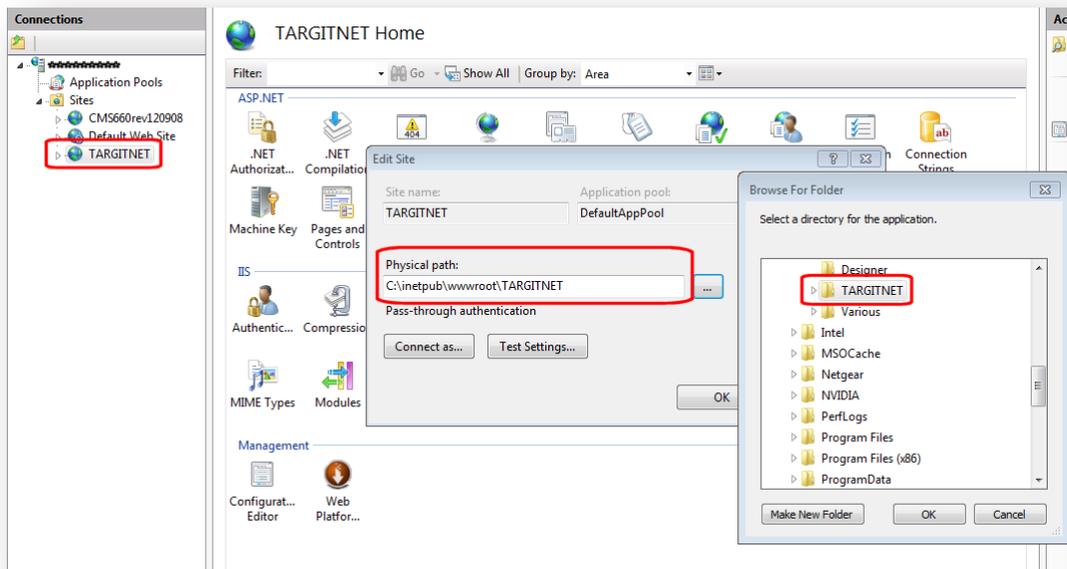
Enabling Windows Authentication

If the TARGIT setting in the `web.config` file is enabled for Windows authentication, then you must also verify that this is enabled in IIS.

In Internet Information Services, *IIS Authentication*, add *Windows Authentication* and then *Enable* this setting.

To add Windows authentication to IIS:

1. Open the **Windows Features** dialog box.
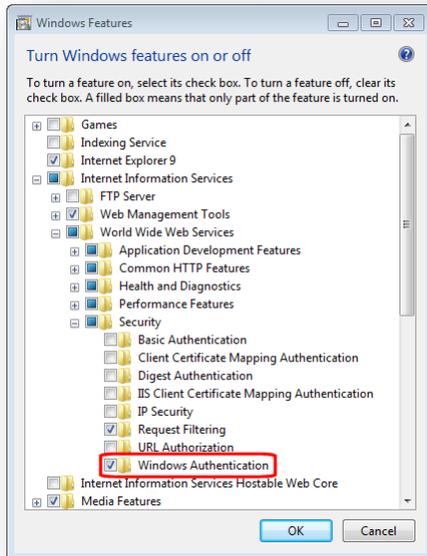
2. Expand the nodes *Internet Information Services*, *World Wide Web Services* and then expand the *Security* node.

3. Select the check box *Windows Authentication*.

4. Click **OK**.

5. In IIS, select the TARGIT site, and then select *IIS*, *Authentication*. You can now see that Windows Authentication appears on the list
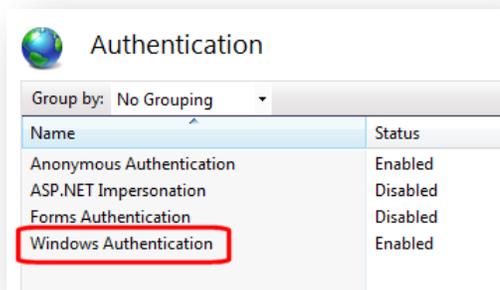
Ensure that this option is enabled.

3.2 Adding a Custom Analyzer Navigation Bar

If you have created your own navigation bar to use with the TARGIT Analyzer, it may not be displayed correctly unless you delete the default navigation bar folder.

Note
If you want to restore the default navigation bar later, first make a backup copy of the default navigation bar folder.

To replace the existing navigation bar:

1. In your TARGIT installation, locate the `NavigationBar` folder. Use the following path:

   `C:\Program Files (x86)\TARGIT\ANTServer\Settings\NavigationBar`

2. Delete the `NavigationBar` folder.

3. Copy the contents of the `TARGIT Settings` folder from your installation package to the *ANTServer* directory and overwrite the existing files.

The custom navigation bar folder in your installation package is then used to create the navigation in the TARGIT Analyzer.