

IBM Client Insight for Wealth Management
Last updated: 2017-04-17

Solution Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 43.

Product Information

This document applies to IBM Client Insight for Wealth Management and may also apply to subsequent releases.

Licensed Materials - Property of IBM

© Copyright IBM Corporation 2016, 2017.

US Government Users Restricted Rights – Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

Contents

Introduction	v
Chapter 1. Overview	1
Chapter 2. Using the solution	3
Dashboard for advisors	3
Dashboard for managers	6
Applying filters	9
Client List	9
Exporting a client list	10
Client Profile	11
Adding an interest to a client profile	14
Deleting an interest from a client profile	14
Twitter	15
Adding a client's Twitter account	16
Removing a client's Twitter account	17
Dynamic Insights	17
My Segments	18
Saving a group of segments	19
Renaming segments	19
Applying saved segments to filters	20
Chapter 3. Administration	21
Managing users	21
Managing API keys	22
Chapter 4. Installation and configuration	23
Prerequisites	23
Contents of the download package	24
Deploying the files on the nodes	24
Creating the physical data model	25
Updating an existing data model	26
Installing and configuring the API layer	26
Loading historical data into the analytics data mart	28
Transforming the data by using DataStage	28
IBM SPSS Collaboration and Deployment Services	31
Importing the SPSS project	32
Specifying a location for the Cross Sell job files	32
Updating the SPSS project resource definitions	34
Running the SPSS jobs	34
Updating the SPSS project streams	35
Generating the web UI	35
Appendix A. Accessibility features	37
Appendix B. Troubleshooting	39
Troubleshooting a problem	39
Troubleshooting resources	39
Notices	43
Index	47

Introduction

The IBM Client Insight for Wealth Management solution gives you the information and insight that you need to provide proactive service to your customers.

Audience

This guide is intended for administrators and users of the IBM Client Insight for Wealth Management solution. It provides information on installation, configuration, and use of the IBM Client Insight for Wealth Management solution.

Finding information

To find product documentation on the web, including all translated documentation, access IBM[®] Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Some of the components included in the IBM Client Insight for Wealth Management have accessibility features. For more information, see Appendix A, “Accessibility features,” on page 37.

IBM Client Insight for Wealth Management HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Samples disclaimer

Sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.

Chapter 1. Overview

The IBM Client Insight for Wealth Management solution uses pre-built analytics to help wealth management companies improve service, retain clients, and increase revenues. It dynamically generates segmentation based on each client's profile and predicts life events by using historical data analysis. The solution provides insight that helps advisors to provide their clients with personalized advice and tailored portfolio recommendations.

The solution provides predictions on when a client is likely to remove their business from your company. The solution provides the reasons for the prediction and recommendations on how to maintain the relationship.

Capabilities of the solution

This version of the solution provides the following capabilities:

- Segments clients dynamically based on behavioral attributes and cash flow patterns.
- Prioritizes client focus based on the urgency of required actions.
- Predicts life events and determines the best actions for each client.
- Manages client attrition by increasing personalization based on the client's financial needs.
- Finds the best approach for each client's needs based on that client's propensity to accept various financial solutions.
- Analyzes an opted-in client's Twitter feed to determine the tone of that client's communication.
- Improves advisor productivity by providing relevant news articles and providing insight into market sentiments.

Chapter 2. Using the solution

The IBM Client Insight for Wealth Management solution provides interactive pages from which you can explore your client base and individual clients.

The solution has two classes of users: Advisors and Managers. If you are an advisor, your dashboard uses data from all clients who are assigned to you. If you are a Manager, your Dashboard page uses data from the clients who are assigned to you plus the clients who are assigned to the advisors who report to you.

The solution provides the following pages:

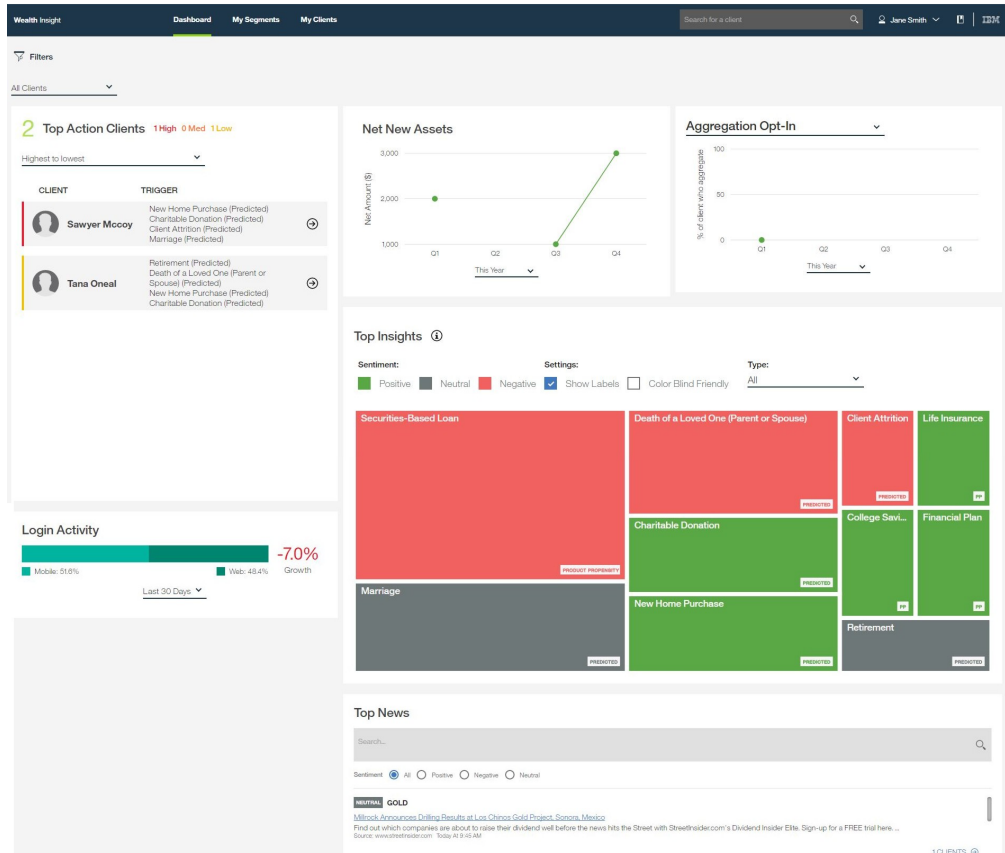
- Dashboard
- My Clients
- Client Profile
- Dynamic Insights
- My Segments
- The Manager page, which is available only to users who are classified as managers.

Dashboard for advisors

The Dashboard is the first page that appears when you log in to the IBM Client Insight for Wealth Management solution. By providing important information, such as a list of your clients who require immediate attention, it helps you to make the most efficient use of your time.

The solution uses two classes of users: Advisor and Manager. For information on the manager dashboard, see “Dashboard for managers” on page 6.

When you log in to the solution as an advisor, the Dashboard page draws upon data for all clients that are under your management. You can filter the data that is used for the various measures in the Dashboard. For more information, see “Applying filters” on page 9.



Top Action Clients

The Top Actions Clients section displays a list of your clients that are in the most need of attention. It rates the urgency of action on your part as either high, medium, or low and provides the reasons that triggered each client's inclusion in the list.

Net New Assets

The Net New Assets chart is a line graph that shows the value of new assets under management that you acquired over a specified time period. This chart represents only assets that are under your company's management. It does not include any external assets that the client might own. You can select a time period that ranges from the current week to the past five years. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

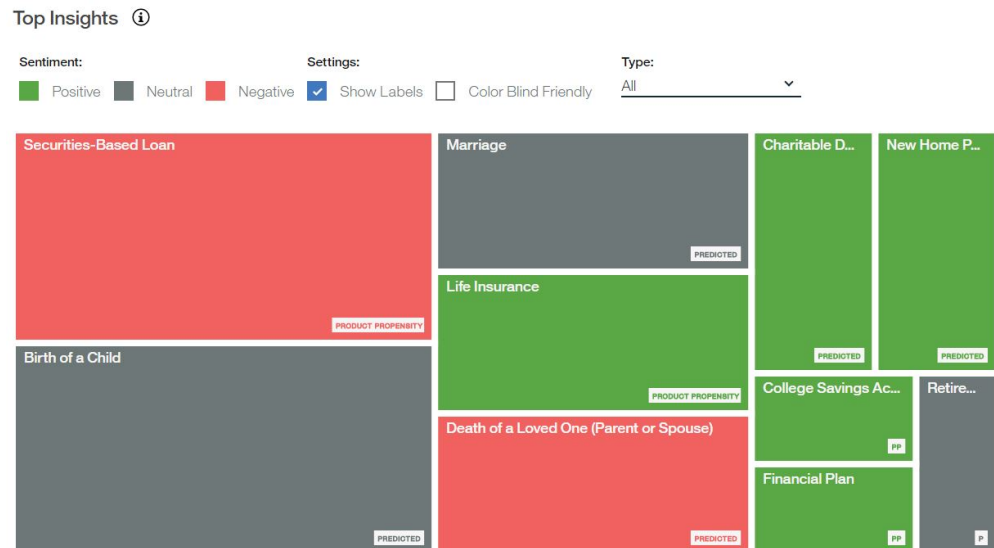
Aggregation Opt-In or Assets Held Internally

When you click the title of this chart, you can choose to show the amount of your clients' assets under your management or an aggregation that includes assets outside of your management. For example, you might have information on external assets, such as real estate, that contributes to a client's net worth. The line graph shows the change in the asset amounts for the period that you select. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Top Insights

The Top Insights heat map uses color and size to communicate the most important 10 insights from your data. Insights are related to either a predicted event or a propensity. A predicted event is an event that is predicted to occur within the current month. A propensity is represented by a score that indicates the likelihood that a client will behave in a certain way within the current month.

In the following screen capture, it can be seen that propensity for a securities-based loan, which has a negative sentiment, is the largest issue that is related to the data.



The scope of the data for this measure is determined by the selections that are made in the Filters pane. You can filter your data further by using the Type control to include Predicted Event, Propensity, or All. You can choose to hide labels and use color-blind friendly colors. When you click an area on the chart, a window provides information and displays links to the dynamic sub-segments and clients that are represented by that area of the chart. For example, the following screen capture shows the menu that is displayed when you click the Securities-based Loan area of the Top Insights chart.



Login Activity

Login Activity shows the percentage change in the number of times that your clients logged in to the solution for the time period that you select. It also indicates the percentage of logins that are from mobile devices versus the number of logins from computers.

Top News

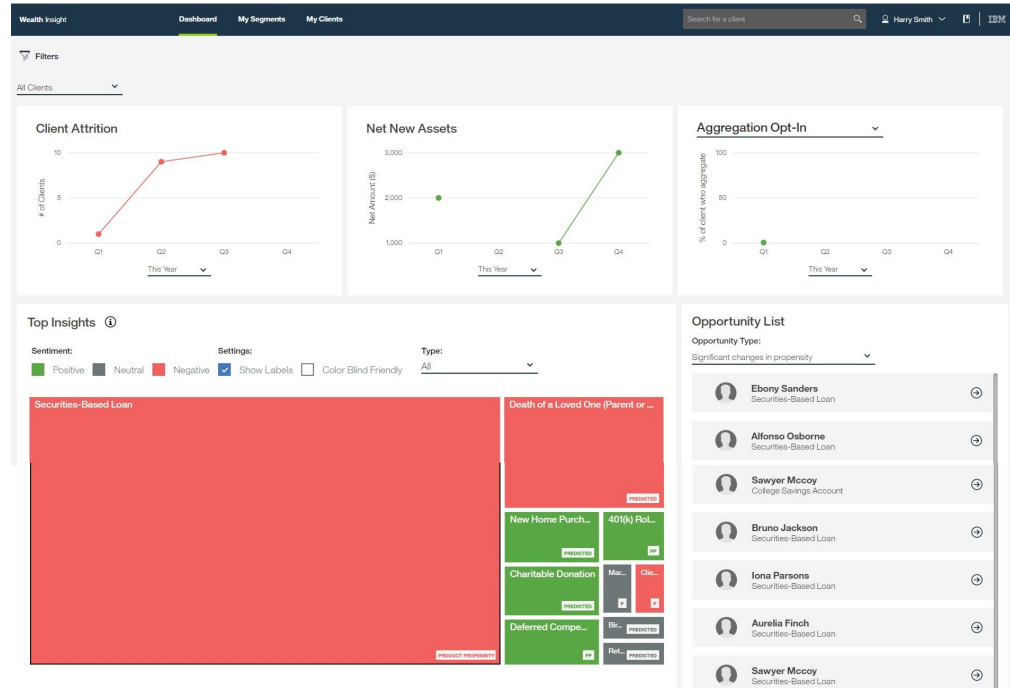
The Top News section provides links to the top news stories for the current day that are relevant to your clients. You can choose to filter the links by sentiment or search for a particular news story.

Dashboard for managers

The Dashboard is the first page that appears when you log in to the IBM Client Insight for Wealth Management solution.

The solution uses two classes of users: Advisor and Manager. For information on the advisor Dashboard, see “Dashboard for advisors” on page 3.

When you log in to the solution as a manager, the Dashboard page draws upon data for all clients of all advisors who are under your management. You can filter the data that is used for the various measures in the Dashboard. For more information, see “Applying filters” on page 9.



Client Attrition

The Client Attrition graph displays the number of your clients who removed their business from your company over the time period that you select for the graph. The scope of the data for this measure is determined by the selections that are made in the Filters pane. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Net New Assets

The Net New Assets chart is a line graph that shows the value of new assets under management that you acquired over a specified time period. This chart represents only assets that are under your company's management. You can select a time period that ranges from the current week to the past five years. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Aggregation Opt-In or Assets Held Internally

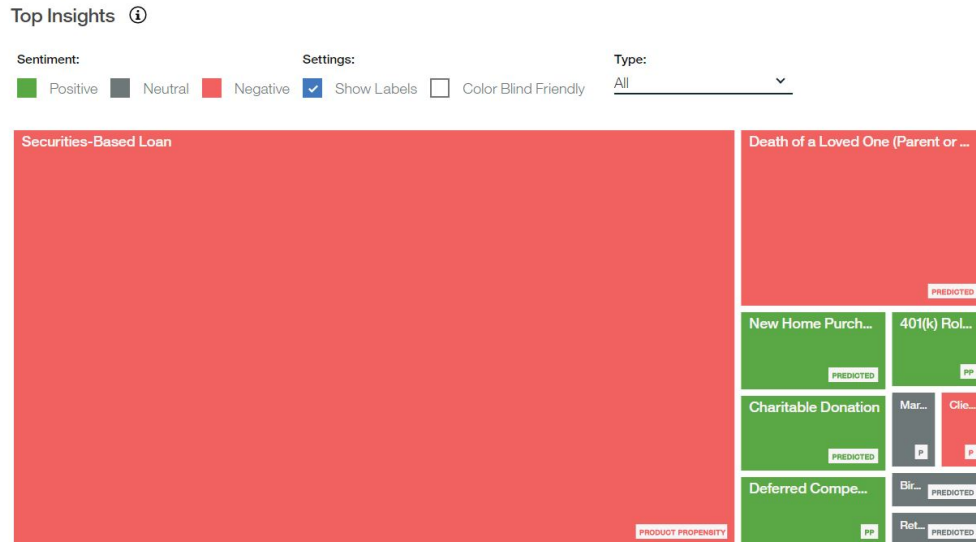
When you click the title of this chart, you can choose to show the amount of your clients' assets under your management or an aggregation that includes assets outside of your management. For example, you might have information on external assets, such as real estate, that contributes to a client's net worth. The line graph shows the change in the asset amounts for the period that you select. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Top Insights

The Top Insights heat map uses color and size to communicate the most important 10 insights from your data. Insights are related to either a predicted event or a propensity. A predicted event is an event that is predicted to occur within the

current month. A propensity is represented by a score that indicates the likelihood that a client will behave in a certain way within the current month.

In the following screen capture, it can be seen that propensity for a securities-based loan, which has a negative sentiment, is the largest issue that is related to the data.



The scope of the data for this measure is determined by the selections that are made in the Filters pane. You can filter your data further by using the Type control to include Predicted Event, Propensity, or All. You can choose to hide labels and use color-blind friendly colors. When you click an area on the chart, a window provides information and links to the dynamic sub-segments and clients that are represented by that area of the chart. For example, the following screen capture shows the menu that is displayed when you click the Securities-based Loan area of the Top Insights chart.



Login Activity

Login Activity shows the percentage change in the number of times that your clients logged in to the solution for the time period that you select. It also indicates the percentage of logins that are from mobile devices versus the number of logins from computers.

Applying filters

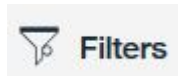
You can apply filters to determine which clients are included in the data that you are analyzing.

About this task

From the Dashboard, My Segments, or the Client List pages, you can apply or remove filters. The filters that you apply are in addition to the filters that are applied automatically when you select an area in the Top Insights chart.

Procedure

1. From the Dashboard, My Segments, or Client List page, click the Filters icon



2. Select the filters that you want to apply.
3. Click **Apply**.

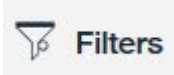
Results

The filters are applied and continue to be applied as you move from page to page throughout the solution.

Client List

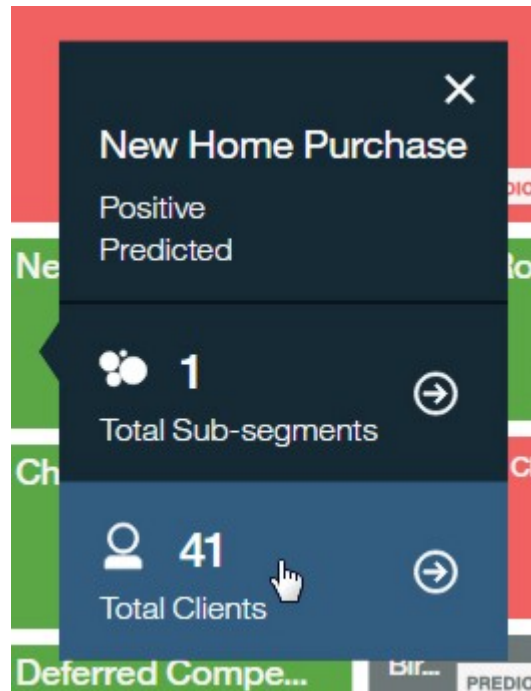
When you log in as an advisor, the client list draws upon all of the clients who are assigned to you. When you log in as a manager, it draws upon all of the clients who are assigned to you and to the advisors who report to you. The Client List provides a list of all clients who meet the criteria that is specified by the filters that you select.

The Client List reflects any filters that you applied in the Dashboard. You can

change or apply filters to the list by clicking the Filters icon . For more information, see “Applying filters.”

You can access a client list in the following ways:

- In the Dashboard page, click the **My Clients** link in the menu bar.
- In the menu bar, enter a name or part of a name in the **Search for a Client** box.
- In the Dashboard page, click an area in the Top Insights chart, and from the pop-up menu, select the **Total Clients** option.



- In the Dynamic Insights page, select a sub-segment, and from the pane that shows the attributes for the sub-segment, click the number of clients.



The Client List provides summary information on each client in the list. To view addresses and advisor names for all clients in the list, click **Expand All**. To view the address and advisor name for a single client, click **View Details**.

You can export a client list to .csv format so that it can be displayed and distributed as a spreadsheet. You can specify that the exported list includes all clients in the list or only selected clients. For more information, see “Exporting a client list.”

Exporting a client list

From a Client List, you can export a list of selected clients to a .csv file that can be opened in spreadsheet software and distributed.

Procedure

1. In a client list, click **Export**.
2. In the Export Client List window, type a name for the .csv file and specify whether to export only selected clients or all clients.
3. Click **Export**.

Results

A .csv file is created, which you can open in a text editor or a spreadsheet program.

Client Profile

The Client Profile page provides information about a client, insights to help you to understand the client, and opportunities for providing the best possible service to the client.

The Personal Information section, displays the client's address, a link to the client's email, and a button for adding a Twitter account.



If you add a Twitter account for a client, then the client's most recent five tweets are displayed on the Communication tab. The Communications tab also contains the Communication Tone Analyzer that determines the tone of the client's tweets over the time period that you specify.

If a Twitter account is already added for the client, then the account name is displayed in place of the **Add Twitter Account** button. For more information, see "Adding a client's Twitter account" on page 16 and "Removing a client's Twitter account" on page 17

The Client Profile has three tabs: Insights, Portfolio, and Communication.

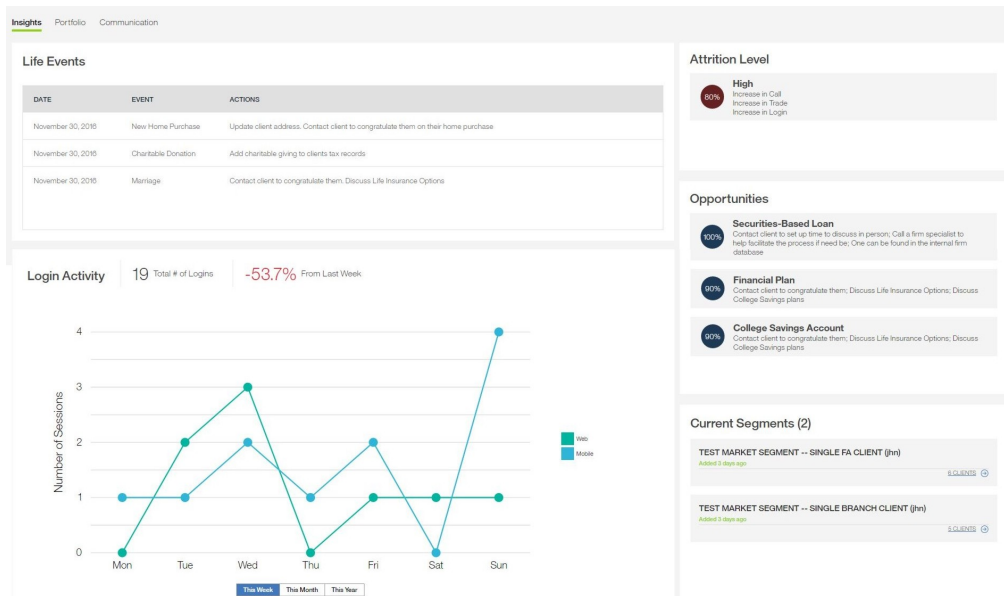


Insights

The Insights tab provides the following features:

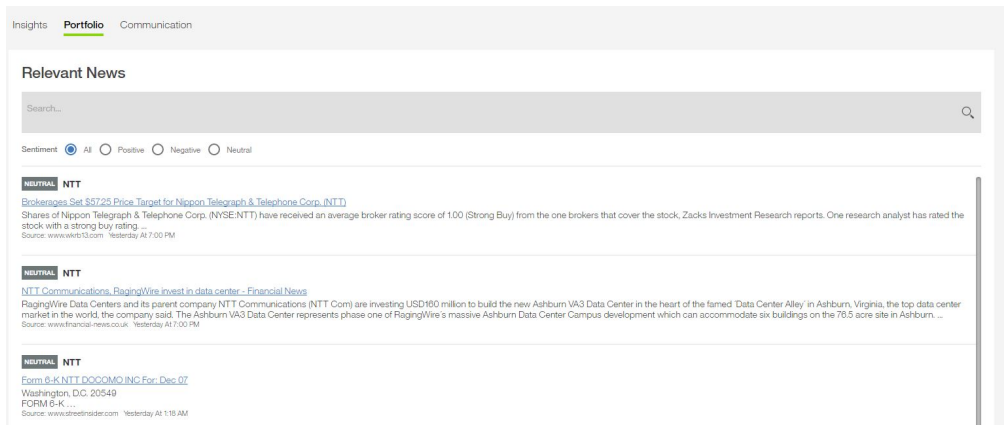
- The Life Events table lists any events for the client that are predicted to occur soon along with suggested actions for the advisor.
- The Log in Activity chart shows the frequency with which the client logged in over the past week, month, or year.
- The Attrition Level indicator provides the percentage likelihood that the client will leave your company.
- The Opportunities list provides the opportunities for increasing your business with the client.

- The Current Segments list identifies the dynamic segments that the client is included in.



Portfolio

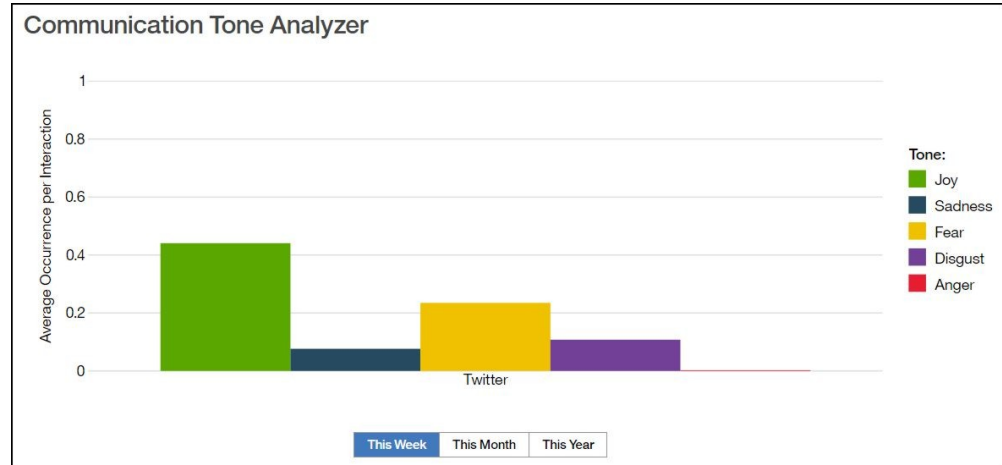
The Portfolio tab provides links to articles that are related to investments that are held in the client's portfolio. You can filter the list of articles by sentiment.



Communication

The Communication tab provides a Communication Tone Analyzer chart and a Recent Twitter Feed list. Both of these features display data only if a Twitter account is connected to the client's profile. For information on adding a Twitter account, see "Adding a client's Twitter account" on page 16

The Communication Tone Analyzer provides an analysis of the tone that is displayed in the client's tweets for the time period that you select.



The Conversation Starters list provides links to articles related to a client's interest. You can filter the articles by selecting sentiments of positive, negative, or neutral.

Insights Portfolio **Communication**

Conversation Starters

All
 Positive
 Negative
 Neutral

[New England Patriots](#)
[Squash](#)
[World Travel](#)
[Add An Interest](#)

TOPICS

NEUTRAL

[Without Gronk, New England Patriots counting on the quirky and tough Martellus Bennett](#)
 Regardless of which monkey you want to give them, the duo has now become a solo act, as Gronkowski has been relegated to injured reserve following a back injury. But while the loss of a monster pass-catching tight end for the rest of the season is a setback for the Patriots' passing game, it's not the crippling blow that it would be to many teams. ...
 Source: www.profootballweekly.com Yesterday At 7:00 PM

POSITIVE

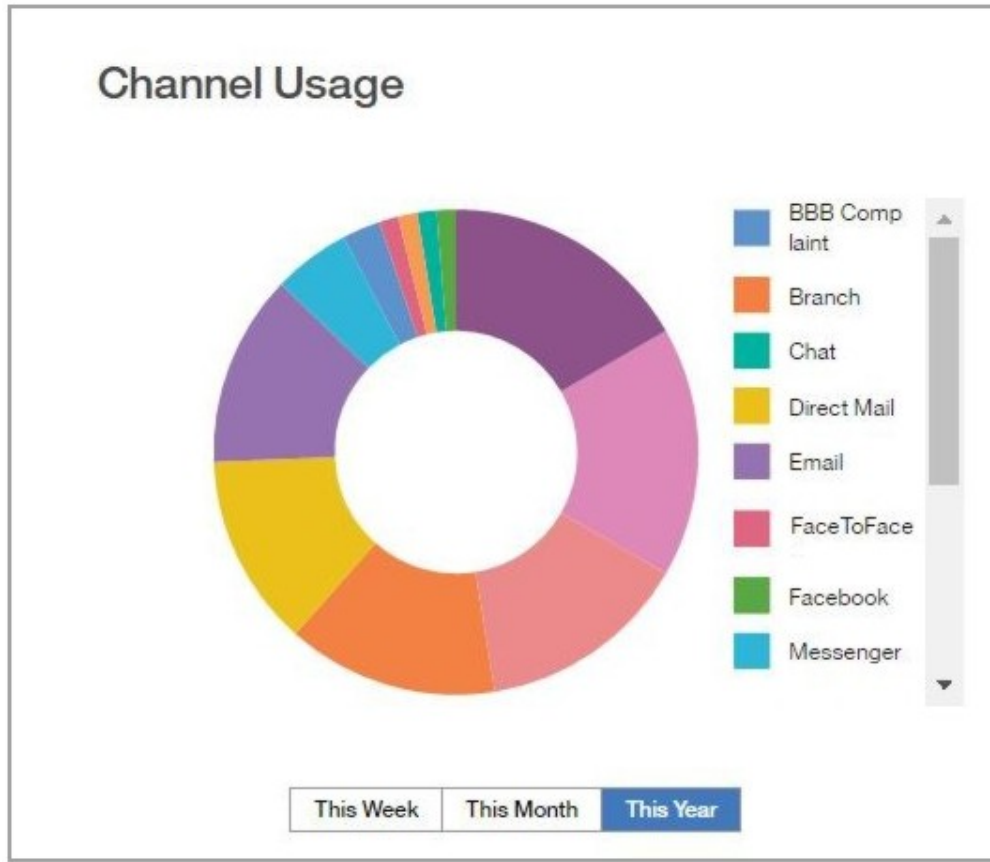
[New England Patriots coach Bill Belichick loves talking lacrosse with Baltimore media](#)
 The Ravens and New England Patriots have met seven times since 2010 including four times in the playoffs. Bill Belichick might prefer not to see the Ravens that often in the postseason, but one thing the New England coach does enjoy is talking lacrosse when he hops onto a conference call with Baltimore reporters....
 Source: www.baltimoresun.com 2 Days Ago At 7:00 PM

NEUTRAL

[The New England Patriots will not wear their throwback uniforms anytime soon due to NFL rule](#)
 The highly popular "Pat Patriot" red throwback uniforms will not be seen on Tom Brady for quite some time. After they introduced the "Flying Elvis" logo in 1993, the New England Patriots have very rarely went back to the old red throwback look and now it seems like it may be gone for good. ...
 Source: nep.247sports.com 4 Days Ago At 7:00 PM

From the Communication tab, you can add interests for the client. For example, if you learn that a client is interested in the New England Patriots football team, you can add it to the client's profile as an interest. For more information, see "Adding an interest to a client profile" on page 14.

The Communication tab also includes the Channel Usage chart, which indicates how the client communicated with your company over the time period that you select.



Adding an interest to a client profile

In the Conversation Starters section of a client profile, you can add an interest for the client. The Conversation Starters feature searches for and displays articles that are related to that interest.

Procedure

1. In a client profile, click the **Communication** tab to display the **Conversation Starters** feature.
2. Click **Manage Interests**.
3. In the Manage Interests window, type the interest that you want to include for the client.

For example, if you learn that the client is interested in baseball, you can add that as an interest. The Conversation Starters feature then displays news items that are related to baseball.

4. Click **Add**.
5. Click **Save**.

Deleting an interest from a client profile

In the Conversation Starters section of a client profile, you can delete an interest for the client.

Procedure

1. In a client profile, click the **Communication** tab to display the **Conversation Starters** feature.

2. Click **Manage An Interest**.
3. In the **Manage an Interest** window, hover your mouse pointer over the interest that you want to delete.
4. Click the x that is displayed for the interest. In the following example, you would click the x to delete squash as an interest.

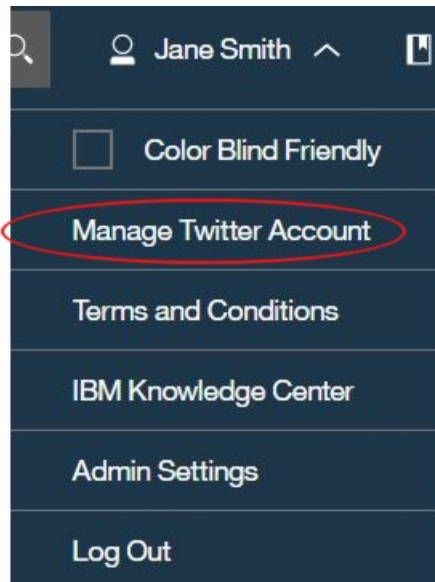
The screenshot shows a 'Manage Interests' dialog box. At the top, there is a title bar with the text 'Manage Interests' and a close button (X). Below the title bar is a text input field with the placeholder text 'Type in an interest' and an 'Add' button. Underneath is a section titled 'Selected Interest(s):' containing a list of interests: 'Football', 'Music', and 'Squash'. The 'Squash' item is highlighted and has a small 'x' icon to its right. At the bottom right of the dialog is a 'Save' button.

5. Click **Save**.

Twitter

With the consent of a client, you can connect one or more Twitter accounts to the client's profile. The client's tweets are analyzed by the Communication Tone Analyzer to provide insight into the tone of a client's communication.

From the Client Profile page, a Twitter account can be added to a client's profile. Before you can add a Twitter account for a client, you must be signed into Twitter. You can sign in or out of Twitter by clicking your name in the menu bar and selecting the Manage Twitter Account command, which is shown in the following screen capture.



When you add a client's Twitter account, an email that requests permission is sent to the client. If the client clicks a link to opt in, then the Twitter feed is added to the profile. After a client opts in, the client's most recent five tweets are displayed on the Communication tab of the Client Profile page. The tweets are analyzed for tone by the Communication Tone Analyzer. The Communication Tone Analyzer derives insights from all the tweets for the period that you specify.

Behavior of the Twitter Feed and Communication Tone Analyzer

Be aware of the following behaviors that are related to the Customer Profile page:

- The Communication Tone Analyzer uses only tweets and not retweets.
- Advisors see only tweets from Twitter accounts that they added for a client. If two advisors share a client, each advisor does not see Twitter feeds that were added by the other advisor.
- By default, the Communication Tone Analyzer is updated after every 10 tweets.
- Managers see the Communication Tone insights of two or more Twitter profiles if two or more exist for a client.
- For each client, managers see the Communication Tone insights for all of the advisors that they manage. However, they do not see the Twitter feed unless they added the Twitter account for that client.

Adding a client's Twitter account

From the Client Profile page, you can add a client's Twitter account. After you add an account, you can see the client's previous five tweets. The Tone Analyzer uses the tweets to determine tone.

About this task

To add a client's Twitter account, you must first sign in to Twitter. When you choose the client's twitter account, an email that asks for permission to use the account is sent to the client. After you add a client's twitter account and the client opts in, then that client's previous five tweets are displayed in the Communications tab of the client profile page. The client's tweets are used by the Communication Tone Analyzer to determine the tone that is expressed in the tweets.

Procedure

1. In a client profile, click **Add Twitter**
2. Sign in to your twitter account.

You must be signed in before you can add a client's Twitter account.

If an email address is not specified in the database, a message prompts you to add an email address for the client. An address is required so that the client's permission to view the Twitter account can be requested by email. Client information, such as email address, cannot be added through the interface of the solution. It must be added to your database.

3. Use the **Search** box to find the client's Twitter account, and click **Save**.

If the client's Twitter account is protected, you must first be a follower of the account before you can add it.

4. In the message that informs you that you must send an opt-in email to the client to receive approval, click **Confirm**.

In your email application, a draft email is displayed that is addressed to the client and asks for permission to add the client's Twitter account. The email contains a link that the client can use to opt in. You can edit the email to personalize it.

5. Send the email to the client.

After you send the email, the Personal Information section of the Client Profile page shows the message: Pending Twitter Opt-in. The client's Twitter feed is available to you only after the client clicks the link in the email to opt in.


Removing a client's Twitter account

From the Client Profile page, you can remove a client's Twitter account.

About this task

When one or more Twitter accounts are connected to a client's account, they appear in the Personal Information section of the Client Profile page and can be removed.

Procedure

1. On the Client Profile page, in the Personal Information section, click the edit icon  .
2. In the Add a Twitter Account window, click the X that is displayed for the connected account that you want to remove.

Dynamic Insights

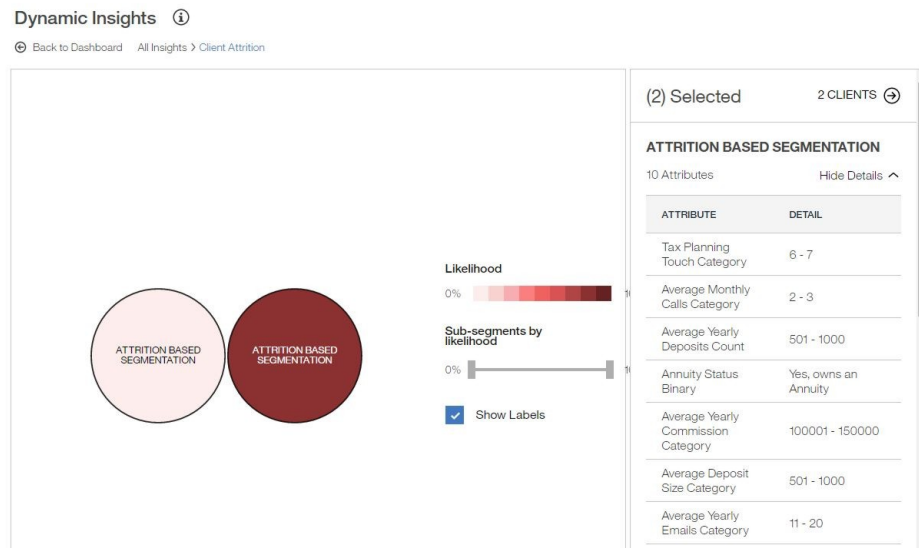
The IBM Client Insight for Wealth Management solution uses dynamic segmentation analytics to create real-time types of clients. Dynamic segmentation is based on client data that includes propensities. The Dynamic Insights page provides a visual representation of the number of clients in each segment for the opportunity type and filters that you chose on the Dashboard page. The Dynamic Insights page can be accessed only from the Dashboard page.

The Dynamic Insights page is accessed from the Dashboard when you click an area of the **Top Insights** chart and then click **Total sub-segments** option.

On the Dynamic Insights page, you can add or remove filters that you applied on the Dashboard page. Dynamic segmentation is based on attributes, such as age,

marital status, and annual salary. A table indicates the attributes that determine which customers are included in a selected segment.

The following page was accessed by clicking **Client Attrition** from the **Top Insights** chart on the Dashboard and selecting **Total Sub-segments**. It provides a representation of the segments that have a propensity for attrition. This example shows two segments. One segment with a low propensity and another with a high propensity for attrition. You can use the slider to filter by the likelihood of attrition.



To see the number of customers that are represented by a bubble, hover your mouse pointer over that bubble.

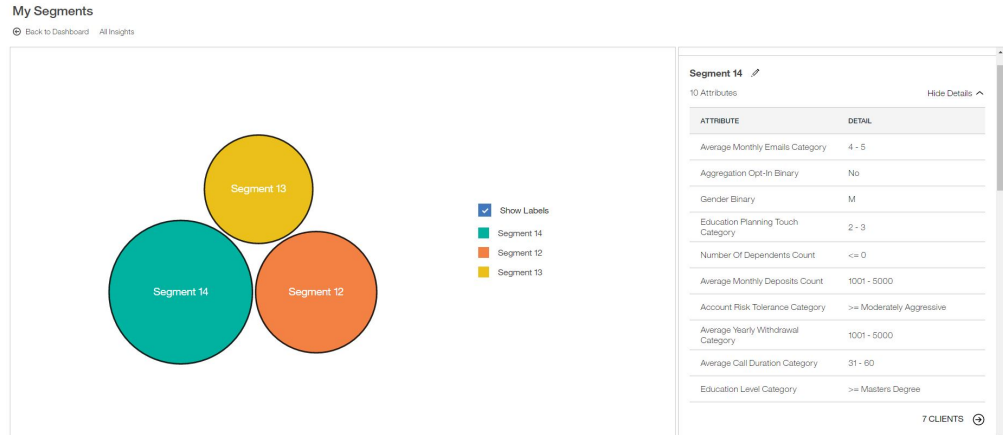
When you select one or more bubbles, a summary of clients in the selected segments is shown in the table. You can select or deselect multiple bubbles by clicking them.

From the table, you can click the number of clients to view the client list. If more than one bubble is selected, you can view a list of all clients in the selected segments by clicking the number of clients. You can also view a list of only clients for a selected segment by clicking the number of clients for that segment in the table.

My Segments

The solution provides two types of segmentation: dynamic segmentation, which reflects all data for a client, including propensities, and general segmentation, which includes the same data but without including propensities. The My Segments page provides a visualization of the general segments within your client base. From the My Segments page you can find your segments, rename them, save groups of segments, and open or delete your saved segments.

When you click **My Segments**, and then click **Find My Segments**, a chart displays bubbles for each of the general segments for your client base. When you select one or more segments by clicking in the bubbles, a table lists the attributes that determine each of the segments.



Saving a group of segments

From the My Segments page, you can rename segments and save groups of segments. The segments that you save can be applied to your Dashboard page.

Procedure

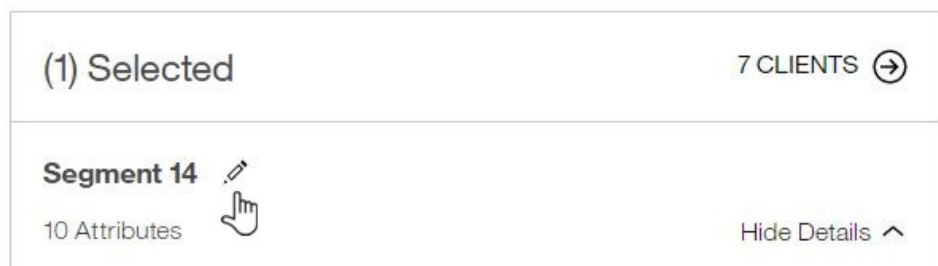
1. If you any filters are applied, deselect them.
2. From the menu bar, click **My Segments**.
3. Click **Find My Segments**.
All of the general segments that your clients fall within are displayed.
4. Click **Save**.

Renaming segments


From the My Segments page, you can provide meaningful names for the segments that you save.

Procedure

1. If you any filters are applied, deselect them.
2. From the menu bar, click **My Segments**.
3. Click **Find My Segments**.
All of the general segments that your clients fall within are displayed.
4. Select the segments that you want to rename.
5. In the panel, click the name of the segment.
6. Click the edit icon, as shown in the following screen capture.




7. Type a name for the segment and click the check mark.
8. Click **Save**.

You can also rename a saved segment by clicking the Saved Segments icon , and clicking the pencil icon for the segment that you want to rename.

Applying saved segments to filters

After you save a group of segments, you can apply them to filters.

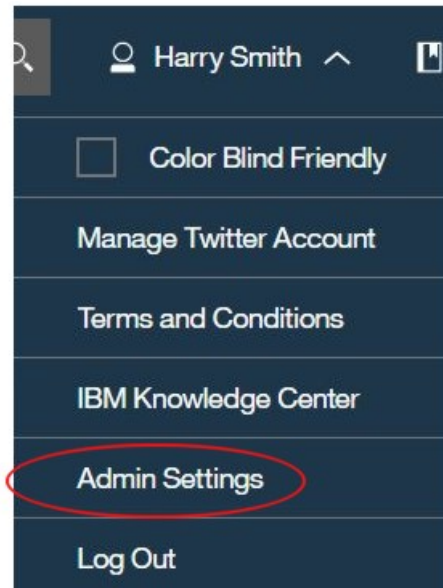
Procedure

1. In the menu bar, click the **Saved Segments** icon .
2. For the saved segment that you want to apply, click **Apply to Dashboard Filter**.

Chapter 3. Administration

The Administration settings allow an administrator to grant either Admin or User privileges to each individual user account and to manage API keys. Admin privileges enable users to generate API keys in order to use public REST API calls.

If you are granted Admin privileges, you can access the Admin Settings by clicking your name in the menu bar.



In the Admin Settings window, you can manage API keys. You can also grant admin privileges to other users so that they can manage API keys.

Managing users

If you have Admin privileges, you can set the permissions for each user to either User or Admin.

About this task

Admin privileges provide access to the Admin Settings functions, which enable a user to manage API keys.

Procedure

1. From the Dashboard or any of the pages in the solution, click your name.
If you have Admin privileges, the **Admin Settings** option is available from the pull-down menu.
2. Click **Admin Settings** and select **Manage Users**.
3. On the Manage Users page, click the Permissions column for a user, and set it to either **User** or **Admin**.

Managing API keys

If you have Admin privileges, you can generate API keys in order to use public REST API calls.

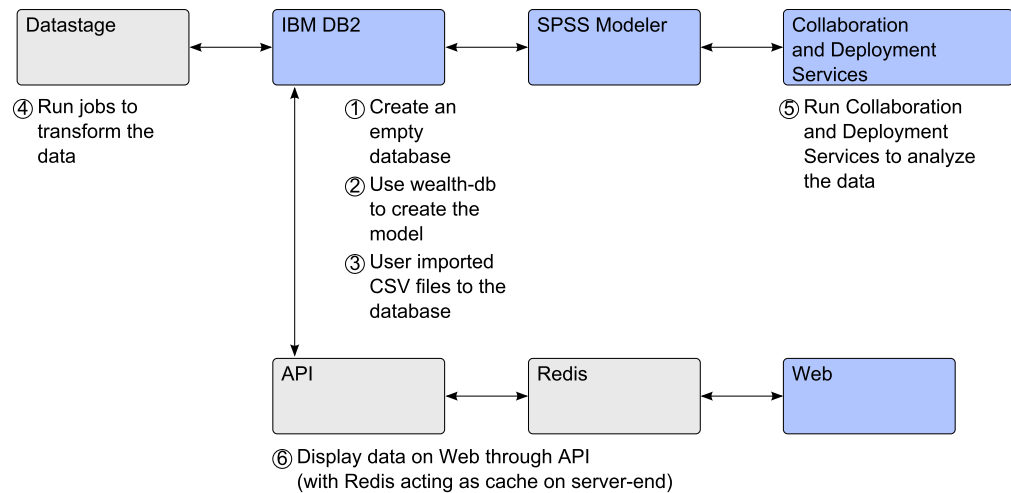
Procedure

1. From the Dashboard or any of the pages in the solution, click your name.
If you have Admin privileges, the **Admin Settings** option is available from the pull-down menu.
2. Click **Admin Settings** and select **Manage API Keys**.
3. To create an API key, type a name for the API key, and click **Generate API Key**.
After an API key is created, it is displayed and you can revoke it or change its name.

Chapter 4. Installation and configuration

The installation and configuration of the IBM Client Insight for Wealth Management solution includes downloading the package from Passport Advantage and configuring the various parts of the solution within your environment.

The installation of the solution involves the tasks that are shown in the following graphic:



Prerequisites

Before you install the IBM Client Insight for Wealth Management solution, you must meet several prerequisites.

You must understand your deployment environment. The solution is installed on several nodes, and you must determine where you want the various components of the solution to be placed. You must have administration permission and the ability to copy files between the computers that are used for the solution.

Before you install the solution, the following software must be installed on the server and client computers.

Servers

- IBM DB2 Server 11.1
- Redis 3.2.3
- Nodejs 4.4.4 (for both Web UI and API)
- IBM SPSS Collaboration and Deployment Services Repository Server 7.0.0.1
- IBM SPSS Modeler Gold 17.1
- IBM SPSS Statistics Server 23.0
- IBM SPSS Statistics 23.0 Collaboration and Deployment Services Adapter 7.0
- R 3.1.0
- IBM SPSS Modeler Version 17.1 - Essentials for R
- IBM InfoSphere DataStage Server 11.5

You must be using Security Assertion Markup Language (SAML) for single sign-on (SSO). You can use OpenAM or another provider. You must configure the Web UI component to point to your SSO provider.

Clients

- IBM Data Studio 4.0
- IBM SPSS Collaboration and Deployment Services Deployment Manager 7.0
- SPSS Modeler Premium 17.1
- IBM InfoSphere DataStage Designer 11.5

Contents of the download package

The IBM Client Insight for Wealth Management package, which you download from Passport Advantage, contains several parts.

The downloads include the following parts:

- API installer
- Web UI installer
- SPSS Streams
- DataStage Jobs

Additionally, downloads are available for the following prerequisite software:

- IBM Predictive Customer Intelligence 1.1.1
- IBM InfoSphere Information Server V11.5.0.1

For more information about downloading the product software, see the download document (www.ibm.com/support/docview.wss?uid=swg24042658).

Deploying the files on the nodes

After you download the IBM Client Insight for Wealth Management solution package, you must deploy the files to the correct nodes.

The packages are provided in bin files. You must copy each bin file to the computer on which you want to run the components. For example, you must run the model creation script on a Linux-based computer that has nodejs and connectivity to the DB2 server.

You must run the bin files to access the script files that you must run.

Procedure

1. Copy the bin files to the computers on which you want to run them.
2. Change the permissions for the bin files so that you can run them.

For example, run the following command in a terminal window:

```
chmod +x filename.bin
```

For example, to change the permissions for the API file, run the following command:

```
chmod +x API_Linux_x86-64.bin
```

3. Run the bin file:

For example, to run the API bin file, run the following command:

```
./API_Linux_x86-64.bin
```

4. Follow the prompts to deploy the bin file contents.
By default, the file contents are deployed to /root/IBM/
Client_Insight_for_Wealth_2.0.

Creating the physical data model

The API component includes the `wealth-db.tar` file, which you use to create the model in a DB2 database that you also create.

If you have an existing database that you intend to use, you don't need to create a physical data model. Instead, go to the topic "Updating an existing data model" on page 26.

You must have `nodejs` installed on a Linux-based computer where you run the script to create the database model. The computer must have access to the DB2 server.

Procedure

1. In your DB2 database instance, create an empty database that uses page size of 32 K. This database is used as the solution data mart.
For example, log on to your data node computer, change to the database instance owner, and enter the following command to create a database:

```
db2 CREATE DATABASE DATABASE_NAME AUTOMATIC STORAGE YES USING CODESET UTF-8 TERRITORY US COLLATE USING SYSTEM PAGESIZE 32768
```
2. Go to the directory where you deployed `API_Linux_x86-64_English.bin` contents.
For example, go to `/root/IBM/Client_Insight_for_Wealth_2.0/API`.
3. Decompress the `wealth-db.tar` file.
For example, enter the following command:

```
tar xvf wealth-db.tar
```
4. Go to the `wealth-db` directory.
5. Open `env.sh` in a text editor.
6. Configure the **database** section to point to the empty database that you created in step 1.
7. Save and close the file.
8. Change the permissions for the `env.sh` file.
For example, run the following command in a terminal window:

```
chmod +x env.sh
```
9. Run `env.sh`. For example, in a terminal window enter `./env.sh`
10. To create the database objects and metadata, run `createmodel.sh`. For example, in a terminal window enter `./createmodel.sh`
11. In the database, verify that the following metadata tables are present and populated:

```
ANALYTIC.ANALYTICS_EVENT_DIMENSION  
ANALYTIC.ANALYTICS_EVENT_TYPE_DIMENSION  
ANALYTIC.CALENDAR_DATE_DIMENSION  
ANALYTIC.CONFIGURATION_BUCKETS_FACT  
ANALYTIC.COMMUNICATION_EMOTION_TYPE  
ANALYTIC.LIFESTATE_EVENT_NAME_MAP  
ANALYTIC.RISK_LEVELS  
ANALYTIC.THRESHOLD_FACT  
ANALYTIC.TIME_DIMENSION
```

```
PARUN.SEGMENTATION_BUCKET_DEFINITION_DIMENSION

REFTABLE.CITY_REF
REFTABLE.CONTINENT_REF
REFTABLE.COUNTRY_REF
REFTABLE.GENDER_REF
REFTABLE.MARITAL_STATUS_REF
REFTABLE.STATE_REF
REFTABLE.PLATFORM_TYPE
REFTABLE.WORLD_LOCATIONS_REF

USERDATA.AGE_RANGE
USERDATA.ASSETS_UNDER_MANAGEMENT_RANGE
USERDATA.QUARTERLY_REVENUE_RANGE
USERDATA.NET_WORTH_RANGE
USERDATA.TRAILING_REVENUE_RANGE

WLTHAPP.APPLICATION_CONFIG
```

Updating an existing data model

If you have an existing DB2 database that you intend to use, you do not need to create the physical data model in a new database. The installer includes a Model Upgrade feature that you can run to prepare the database.

If you choose not to use an existing database, go to the topic “Creating the physical data model” on page 25.

The API component includes a `wealth-upgrader.tar` file, which is used to upgrade the DB2 database.

Procedure

1. Go to the directory where `API_Linux_x86-64_English.bin` is deployed.
2. Extract the `wealth-upgrader.tar` file by using the following command:

```
tar xvf wealth-upgrader.tar
```
3. In the `wealth-upgrader/config` directory, open the `defaults.json` file in a text editor and enter the database information.
4. In the `wealth-upgrader` directory, enter the following command:

```
chmod +x upgradeModel.sh
```
5. Run the following command:

```
./upgradeModel.sh
```

Installing and configuring the API layer

After you create the physical data model, run the DataStage jobs, and load the SPSS project, you can install and configure the API layer. You must deploy the API on a Linux-based computer on which `nodejs` is installed.

Before you begin

Redis and SSO must be properly installed and configured.

Procedure

1. Go to the directory where you deployed `API_Linux_x86-64_English.bin` contents.

- For example, go to `/root/IBM/Client_Insight_for_Wealth_2.0/API`.
2. Decompress the `wealth-api.tar` file.
For example, enter the following command:
`tar xvf wealth-api.tar`
 3. Go to the `api` directory.
 4. Open the `env.sh` file in a text editor.
 5. In the `FSS_WEALTH_API` section of the `env.sh` script, enter the following settings. By default, SSL is enabled.
 - a. Set the port number for the API application to use in the **server** section.
 - b. Set the **watsonServer** section to point to the Watson API information that will be set in the `FSS_WEALTH_WATSON` section. By default, **watsonServer** is set to disabled.
 - c. Configure the **database** section to point to the database that you created in step 1 “Creating the physical data model” on page 25.
 - d. Configure the **cache** section to point to your Redis installation.
 - e. Set **apiKey**.
 - f. Set the `incomingInternetTraffic` section to point to the `incomingInternetTraffic/env.sh` information.
 6. In the `FSS_WEALTH_WATSON` section of the `env.sh` script, enter the following settings. By default SSL is enabled.
 - a. Set the port number for the Watson API application to use in the server section.
 - b. Configure the **database** section to point to the database that you created in step 1 “Creating the physical data model” on page 25.
 - c. Configure the **cache** section to point to your Redis installation.
 - d. Set **apiKey**.
 - e. Set **personalityInsights** and **toneAnalyzer** with user names and passwords.
 - f. Set **watsonServiceApiKey**.
 7. Save and close the file.
 8. Run the following command: **source env.sh**.
 9. Run the application in the background by using the following command:
`nohup node lib/app.js &`
`nohup node lib/watsonApp.js &`
 10. In the `api` directory, go to **IncomingInternetTrafficService**.
 11. Open the `env.sh` file in a text editor.
 12. In the `FSS_WEALTH_INCOMING_INTERNET_TRAFFIC_SERVICE` section in the `env.sh` script, enter the following settings. By default, SSL is enabled.
 - a. Set the **apiServer** section to point to the `FSS_WALTH_API` information.
 - b. Configure the **incomingInternetTraffic** section to have the Opt-IN option enabled for Twitter.
 13. Save and close the file.
 14. Run the following command: **source env.sh**.
 15. Run the application in the background by using the following command:
nohup node lib/app.js &

Results

If you are successful, the model is now created and the API and Watson API are running.

If you need to stop the API, Watson API, or Web Process do the following steps:

1. Run the following command:

```
ps aux
```

2. Find the process id for `lib/watsonApp.js` (for watson) and `node lib/app.js` (You might see two of the same lines if the API and Web processes are both running on the same server).
3. After the process id's are found, run the command: **sudo kill -9 process_id**
Where `process_id` is the one that is found when you run `ps aux` for `node lib/app.js` or `lib/watsonApp.js`.

Loading historical data into the analytics data mart

After you create your database and run the scripts in the `wealth-db.tar` file, you must load your historical data.

The historical data must be populated in the following database tables:

- **STAGING.ACCOUNT_ARRANGEMENT_STAGING**
- **STAGING.ASSET_STAGING**
- **STAGING.ATTRITION_FACTORS_STAGING**
- **STAGING.CLIENT_ADVISOR_STAGING**
- **STAGING.COMMUNICATION_STAGING**
- **STAGING.CONTACT_INFORMATION_STAGING**
- **STAGING.CUSTOMER_STAGING**
- **STAGING.CUSTOMER_STOCK_STAGING**
- **STAGING.CUSTOMER_SUMMARY_STAGING**
- **STAGING.EVENT_RECOMMENDATIONS_STAGING**
- **STAGING.LIFESTATE_EVENTS_STAGING**
- **STAGING.LIFESTATE_EVENT_MAP_STAGING**
- **STAGING.LOGIN_STAGING**
- **STAGING.PERSONALITY_INSIGHTS_STAGING**
- **STAGING.PRODUCT_STAGING**
- **STAGING.TEXT_STAGING**
- **STAGING.THRESHOLD_STAGING**
- **STAGING.USER_STAGING**

You can use CSV files to load the historical table, or you can use any other method that you prefer.

Important: Do not modify any other database table.

Transforming the data by using DataStage

You must use DataStage Designer to import the DataStage jobs into DataStage Server and to compile and run the jobs.

Procedure

1. Run the DataStage_Jobs_English.bin installer.
2. Accept the license agreement, and follow the steps to deploy the contents.
3. Go to the directory where the DataStage_Jobs_English.bin and DataStage_Jobs_English.exe files were deployed.
4. Update the setenvironment.sh file or setenvironment.bat file to reflect the environment where DataStage Server is deployed:
 - url: the url of DataStage Server
 - port: the DataStage Server port
 - host: the hostname of DataStage Server
 - username: username for DataStage
 - password: password for DataStage
 - project: the DataStage project name
 - projectdb: the ODBC connection in DataStage Server (not the DB2 database name)
 - dbusername: the user name for the DB2 database
 - dbpassword: the password for the DB2 database. You must use the encrypted version of the password. The DataStage installation includes a program that provides the encrypted value for a password.

On windows use the following command:

```
setenvironment.bat %ispath%\ASBNode\bin\encrypt.bat
```

On Linux use the following command:

```
source ./setenvironment.sh $ispath/ASBNode/bin/encrypt.sh
```

Enter the output into the setenvironment file. If the output includes "/" characters, escape them with "\". For example,

```
{iisenc}Vw5tnnWe6HVwyf1/beJokw==
```

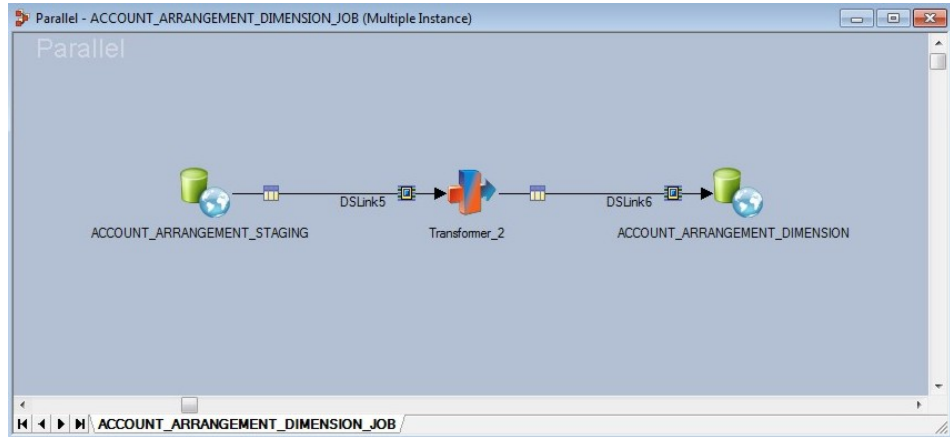
is entered as

```
{iisenc}Vw5tnnWe6HVwyf1\beJokw==
```

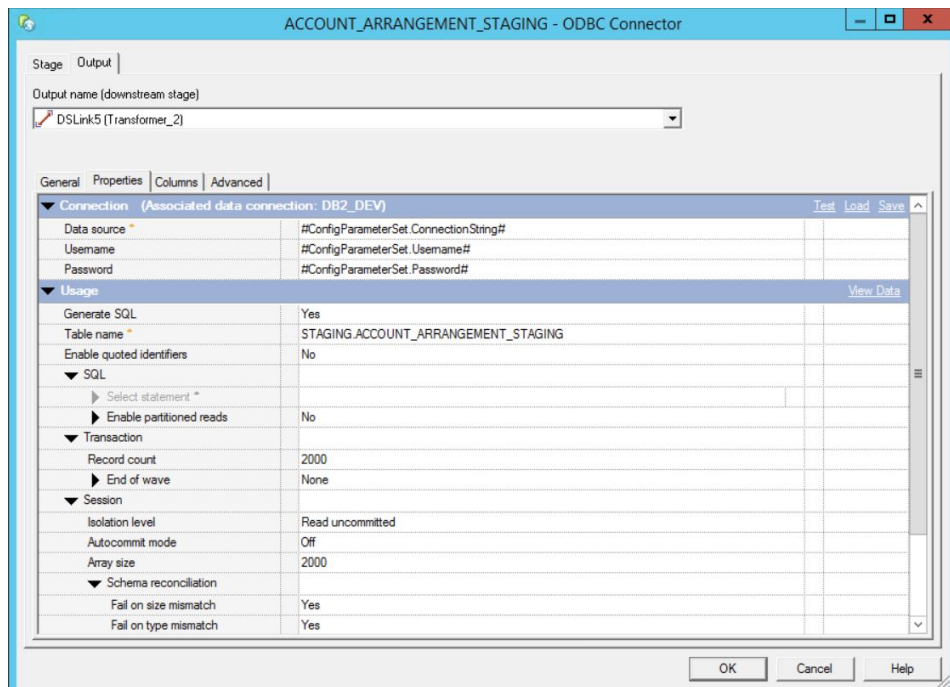
Your setenvironment file will look similar to the following example:

```
#!/bin/bash
export ispath=/opt/IBM/InformationServer
export url=https://srv-datastage:9446
export port=9446
export host=srv-datastage
export username=isadmin
export password=isadminpassword
export project=WLTH
export projectdb=WLTHDB
export dbusername=db2admin
export dbpassword=[encrypted_db_password]
```

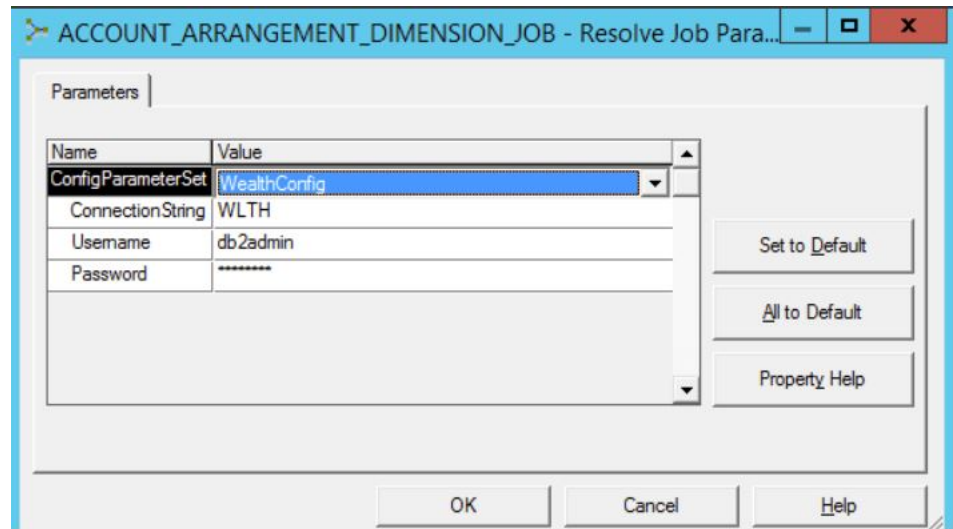
5. To import the project, run the importprojectfromisx.sh or importprojectfromisx.bat file.
6. In DataStage Designer, verify that the connection is valid, and open a job such as ACCOUNT_ARRANGEMENT_DIMENSION_JOB, as shown in the following screen capture.



7. Double-click the first node (the ACCOUNT_ARRANGEMENT_STAGING node in this example). The properties window displays the connection properties for the node.



8. To test the database connection of DB2_DEV, click **Test**. A window similar to the following one appears.



9. Click the **ConfigParameterSet** drop-down, and select **WealthConfig**. Verify that the ConnectionString (the ODBC data source name) and username are correct, and click **OK**.
10. Run the DataStage jobs. To run all jobs, run the job that is named **A11_Stages**.

IBM SPSS Collaboration and Deployment Services

The IBM Client Insight for Wealth Management solution uses IBM SPSS Collaboration and Deployment Services to analyze data.

IBM SPSS Collaboration and Deployment Services includes a server-side component that is called Repository Server, and a client-side component that is called Deployment Manager. You use Deployment Manager to interact with the Repository Server.

Repository Server

All the data models that perform analytics on your data sets are saved as files with the .str file extension; they are known as streams. The Repository Server is responsible for storing these streams, in addition to other responsibilities such as managing the execution of the streams. Streams are packaged within jobs, which contain one or more streams. These jobs might contain streams that are run concurrently, and they might also contain streams that are run sequentially if dependencies exist between the streams. When data analysis is performed, the Repository Server does not directly run streams; rather, it runs jobs.

Streams and jobs in the Repository Server are stored within separate directories in a file hierarchy. The project file that is imported when you set up your data analytics project contains several streams and jobs.

Deployment Manager

The Deployment Manager is used to connect to a Repository Server and to make changes to the Repository Server. Changes to Repository Server include uploading the initial project file and uploading new streams. The Deployment Manager can be used to manually run jobs and view logs of the execution of the jobs. Running jobs manually is not necessary because the execution of the jobs is automated in the solution.

Importing the SPSS project

You must import a project file into the Repository Server by using the IBM SPSS Collaboration and Deployment Services Deployment Manager.

Procedure

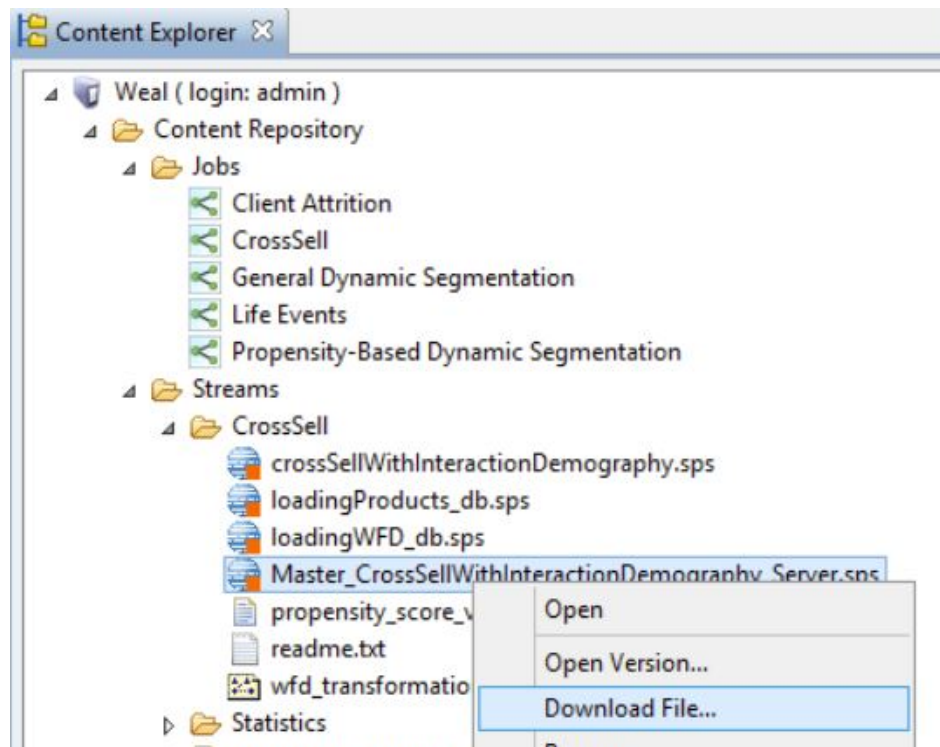
1. Ensure that the project file (.pes) is on the computer where IBM SPSS Collaboration and Deployment Services Deployment Manager is installed.
2. In Deployment Manager, click **File > New > Content Server Connection**.
3. Enter a name for your Repository Server connection. Enter the URL for the Repository Server in the form of `http://hostname:9080`, and click **Finish**.
4. In **Content Explorer**, click next to your Repository Server entry, enter the credentials, and click **OK**.
5. Right-click **Content Repository**, and click **Import**.
6. For the **Import File** field, click **Browse**, select the project file, and click **Open**.
7. Leave the default options selected, and click **OK**.
8. For the subsequent windows, leave the default options selected.

Specifying a location for the Cross Sell job files

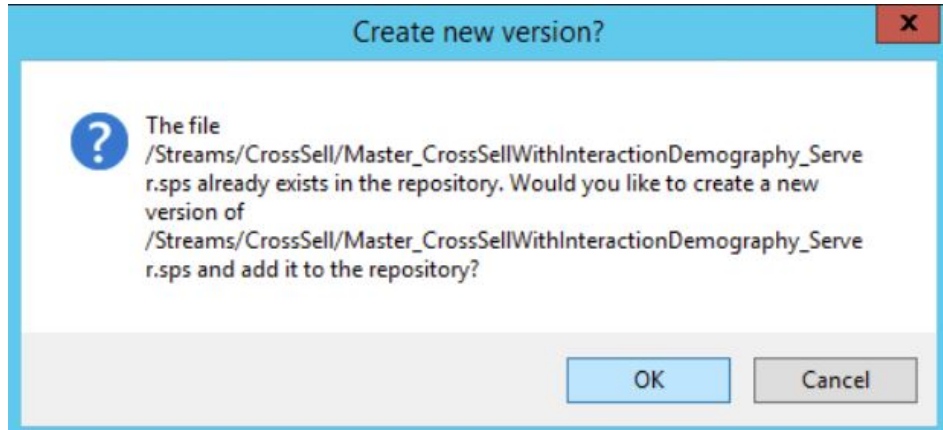
After importing the .pes file to the SPSS Collaboration and Deployment client, you must specify a location where the files created by the Cross Sell Job are placed.

Procedure

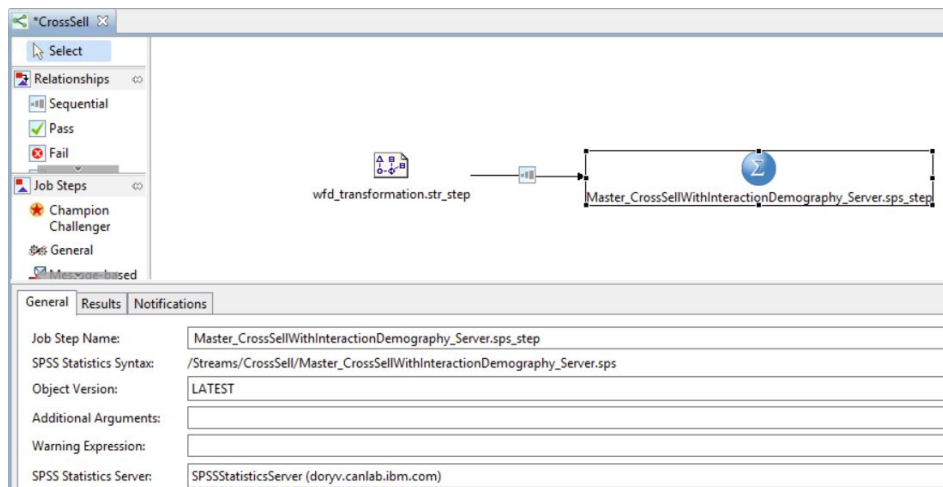
1. On the Statistics Server, create a directory for the Cross Sell job files.
The user "spssusr" must have access to this directory on the Statistics Server.
2. In Content Explorer, expand **Content Repository > Streams > CrossSell**.
3. Right-click the `Master_CrossSellWithInteractionDemography_Server.sps` file, as shown in the following screen capture, and click **Download File**.



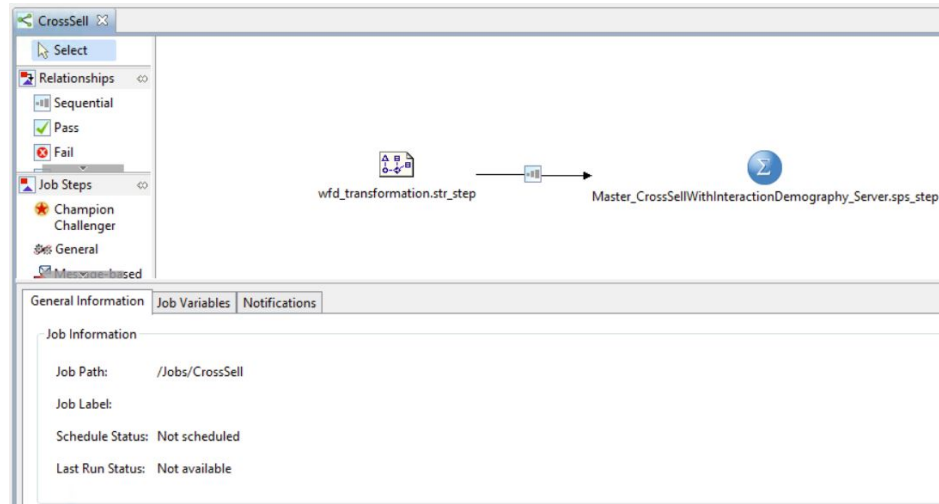
4. Go to the directory where the file was downloaded, and open it with a text editor.
5. In the line in the file that says CD '<FILE_PATH>', replace <FILE_PATH> with the directory name that you created in step 1.
6. Save the file.
7. In Deployment Manager, right-click the CrossSell folder, click **Add File to Repository**, add the Master_CrossSellWithInteractionDemography_Server.sps file that was edited, and in the Create new version box, click **OK**.



8. Double-click the CrossSell job, and click the Master_CrossSellWithInteractionDemography_Server.sps_step node, as shown in the following screen capture.



9. An asterisk (*) is displayed on the CrossSell tab to indicate that the information is not yet saved. Click **Save**.



Updating the SPSS project resource definitions

After the project is imported, the project's resource definitions must be updated.

Updating the resource definitions includes the following tasks:

- Specifying which SPSS Modeler Server runs the streams.
- Specifying the credentials to use to connect to the WebSphere Business Modeler server.
- Specifying the credentials to use to connect to the database from which the streams read data and to which the results of the streams are saved.

Before you begin

You must create an ODBC data source connection on the SPSS server computer that points to the database that you created in “Creating the physical data model” on page 25. The ODBC data source connection must be named **FSS**.

Procedure

1. In Deployment Manager, in the **Content Explorer** pane, click **Resource Definitions > Servers**.
2. Under **Servers**, double-click the server definition that you want to update.
3. Make updates to the server definition parameters, and click **Finish**.
4. To update the Credentials of the SPSS Modeler Server, in the **Content Explorer** pane, click **Resource Definitions > Credentials**.
5. Under Credentials, double-click the credentials that are used for SPSS Modeler Server, make any required updates to the credentials, and click **Finish**.
6. To update the Credentials of the database, in the **Content Explorer** pane, click to **Resource Definitions > Credentials**.
7. Under Credentials, double-click the credentials that are used for the database, make any required updates to the credentials, and click **Finish**.

Running the SPSS jobs

After you import the SPSS project, you must run the SPSS jobs. The jobs must be run in a specific order.

Procedure

1. In Deployment Manager, expand **Content Repository > Jobs**.
2. Run the jobs in the following order:
 - a. **Client Attrition**
 - b. **Cross Sell**
 - c. **General Dynamic Segmentation**
 - d. **Life Events**
 - e. **Propensity-Based Dynamic Segmentation**

For more information about running jobs, see the Deployment Manager documentation (www.ibm.com/support/knowledgecenter/en/SS69YH_7.0.0/cads_manager_ddita/model_management/thick/job_schedule_overview.html).

Updating the SPSS project streams

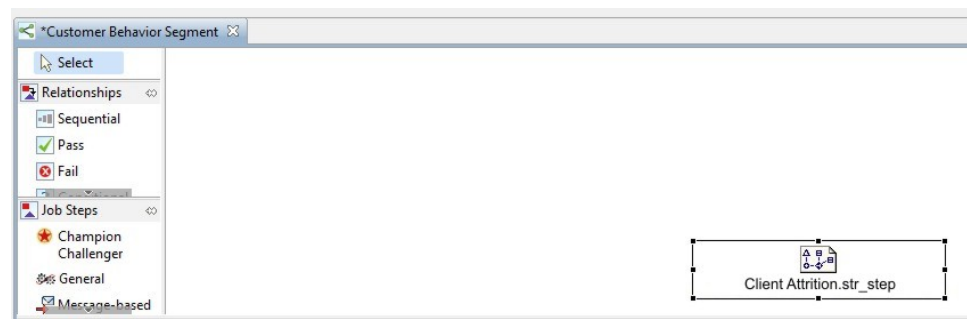
Occasionally, the data analytics streams might need to be updated.

Procedure

1. In Deployment Manager, connect to the correct Repository Server.
2. Right-click the Streams directory, and select **Add File to Repository**.
3. Select the new stream that you want to update.
4. To overwrite the existing stream file, click **OK**.
5. Expand the Jobs directory, and open the job that contains the stream file that was updated.



6. Click the stream's icon, wait until an asterisk appears next to the open job's name in the tab, and then save the job.



Generating the web UI

The wealth-web installer includes the `wealth-web.tar` file, which you use to create the web UI for the solution. You must deploy the API on a Linux-based computer on which nodejs is installed.

Before you begin

Redis and SSO must be properly installed and configured.

Procedure

1. Go to the directory where you deployed `Web_UI_Linux_x86-64_English.bin` contents.
For example, go to `/root/IBM/Client_Insight_for_Wealth_2.0/Web`.
2. Decompress the `wealth-web.tar` file.
For example, enter the following command:

```
tar xvf wealth-web.tar
```
3. In the `web/dist` directory, open `config.js` in a text editor.
 - a. Enter the **HOST** and **PORT** number where the API is running.
By default, SSL is enabled in the configuration file. If you are not using SSL, change the **PROTOCOL** to `http`.
4. In the `web` directory, open `env.sh` in a text editor.
 - a. Enter the **HOST** and **PORT** number where the API is running.
 - b. Configure the **cache** section to point to your Redis installation.
 - c. Configure the **sso** section to point to your SAML SSO provider.
By default, SSL is disabled in the `env.sh` file.
The `env.sh` file includes a line under "server" that specifies a domain. Leave the value for domain blank.
5. Run the application:
 - Use the following command to run the application in the foreground:

```
source env.sh
```
 - Use the following command to run the application in the background:

```
nohup node lib/app.js &
```

Results

If you are successful, the web UI is now accessible at the configured URL.

If you need to stop the application, do the following steps:

1. Run the following command: `ps aux`
2. Find the process ID for `node lib/app.js`. There will be two entries if the API and Web UI components are both running on the same computer.
3. Run the following command to end the processes: `sudo kill -9 process_id`

Appendix A. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

For information about the commitment that IBM has to accessibility, see the IBM Accessibility Center (www.ibm.com/able).

IBM Cognos® HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Report output

In IBM Cognos Administration, you can enable system-wide settings to create accessible report output. For more information, see the *IBM Cognos Analytics Administration and Security Guide*. In IBM Cognos Report Studio, you can enable settings to create accessible output for individual reports. For more information, see the *IBM Cognos Report Studio User Guide*. You can access the previously mentioned documents at IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Appendix B. Troubleshooting

This section contains troubleshooting information for the IBM Client Insight for Wealth Management installation.

Troubleshooting a problem

Troubleshooting is a systematic approach to solving a problem. The goal of troubleshooting is to determine why something does not work as expected and how to resolve the problem.

Review the following table to help you or customer support resolve a problem.

Table 1. Troubleshooting actions and descriptions

Actions	Description
A product fix might be available to resolve your problem.	Apply all known fix packs, or service levels, or program temporary fixes (PTF).
Look up error messages by selecting the product from the IBM Support Portal, and then typing the error message code into the Search support box (http://www.ibm.com/support/entry/portal/).	Error messages give important information to help you identify the component that is causing the problem.
Reproduce the problem to ensure that it is not just a simple error.	If samples are available with the product, you might try to reproduce the problem by using the sample data.
Ensure that the installation successfully finished.	The installation location must contain the appropriate file structure and the file permissions. For example, if the product requires write access to log files, ensure that the directory has the correct permission.
Review all relevant documentation, including release notes, technotes, and proven practices documentation.	Search the IBM Knowledge Center to determine whether your problem is known, has a workaround, or if it is already resolved and documented.
Review recent changes in your computing environment.	Sometimes installing new software might cause compatibility issues.

If the items in the table did not guide you to a resolution, you might need to collect diagnostic data. This data is necessary for an IBM technical-support representative to effectively troubleshoot and assist you in resolving the problem.

Troubleshooting resources

Troubleshooting resources are sources of information that can help you resolve a problem that you are having with an IBM product.

Support Portal

The IBM Support Portal is a unified, centralized view of all technical support tools and information for all IBM systems, software, and services.

The IBM Support Portal lets you access all the IBM support resources from one place. You can tailor the pages to focus on the information and resources that you need for problem prevention and faster problem resolution. Familiarize yourself with the IBM Support Portal by viewing the demo videos (https://www.ibm.com/blogs/SPNA/entry/the_ibm_support_portal_videos).

Find the content that you need by selecting your products from the IBM Support Portal (<http://www.ibm.com/support/entry/portal>).

Before contacting IBM Support, you will need to collect diagnostic data (system information, symptoms, log files, traces, and so on) that is required to resolve a problem. Gathering this information will help to familiarize you with the troubleshooting process and save you time.

Service request

Service requests are also known as Problem Management Reports (PMRs). Several methods exist to submit diagnostic information to IBM Software Technical Support.

To open a PMR or to exchange information with technical support, view the IBM Software Support Exchanging information with Technical Support page (<http://www.ibm.com/software/support/exchangeinfo.html>).

Fix Central

Fix Central provides fixes and updates for your system's software, hardware, and operating system.

Use the pull-down menu to navigate to your product fixes on Fix Central (<http://www.ibm.com/systems/support/fixes/en/fixcentral/help/getstarted.html>). You may also want to view Fix Central help.

IBM developerWorks®

IBM developerWorks provides verified technical information in specific technology environments.

As a troubleshooting resource, developerWorks provides easy access to the most popular practices, in addition to videos and other information: developerWorks (<http://www.ibm.com/developerworks>).

IBM Redbooks®

IBM Redbooks are developed and published by the IBM International Technical Support Organization, the ITSO.

IBM Redbooks (<http://www.redbooks.ibm.com>) provide in-depth guidance about such topics as installation and configuration and solution implementation.

Software support and RSS feeds

IBM Software Support RSS feeds are a quick, easy, and lightweight format for monitoring new content added to websites.

After you download an RSS reader or browser plug-in, you can subscribe to IBM product feeds at IBM Software Support RSS feeds (<https://www.ibm.com/software/support/rss>).

Log files

Log files can help you troubleshoot problems by recording the activities that take place when you work with a product.

Error messages

The first indication of a problem is often an error message. Error messages contain information that can be helpful in determining the cause of a problem.

Notices

This information was developed for products and services offered worldwide.

This material may be available from IBM in other languages. However, you may be required to own a copy of the product or product version in that language in order to access it.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service. This document may describe products, services, or features that are not included in the Program or license entitlement that you have purchased.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

Intellectual Property Licensing
Legal and Intellectual Property Law
IBM Japan Ltd.
19-21, Nihonbashi-Hakozakicho, Chuo-ku
Tokyo 103-8510, Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

IBM Software Group
Attention: Licensing
3755 Riverside Dr.
Ottawa, ON
K1V 1B7
Canada

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, the results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurements may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

All statements regarding IBM's future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

If you are viewing this information softcopy, the photographs and color illustrations may not appear.

This Software Offering does not use cookies or other technologies to collect personally identifiable information.

Trademarks

IBM, the IBM logo and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at “ Copyright and trademark information ” at www.ibm.com/legal/copytrade.shtml.

Index

A

- accessibility 37
- administration 21
- API 25, 26
- API keys 22

C

- Channel usage 11
- client list 9
 - exporting 10
- client profile 11
 - add an interest 14
 - delete an interest 14
- Communication tab 11
- Communication tone analyzer 15
- configuration 23

D

- dashboard
 - advisor 3
 - manager 6
- data model 25
- data model upgrade 26
- database
 - creating 28
- DataStage 29
- deploying files to nodes 24
- Deployment Manager 31
- download package 24
- dynamic insights 17

E

- export client list 10

F

- filters 9

I

- Insights tab 11
- installation 23
 - prerequisites 23
- interest 14

M

- managing API keys 22
- managing users 21
- model
 - creating 25, 26

- model (*continued*)
 - upgrading 26
- My clients 9
- My segments 18

O

- overview of the solution 1

P

- Portfolio tab 11
- prerequisites to installation 23

R

- renaming segments 19, 20

S

- saving segments 19
- segments
 - renaming 19, 20
 - saving 19
- SPSS
 - importing SPSS project 32
 - updating project resource definitions 34
 - updating SPSS streams 35
- SPSS Collaboration and Deployment Services 31

T

- troubleshooting 39
 - resources 39
- Twitter 11, 15
 - adding account 16
 - removing account 17

U

- UI 36
- users
 - advisor 3
 - manager 3

W

- wealth-api.tar 26
- wealth-db.tar file 25
- wealth-upgrader.tar file 26
- wealth-web.tar file 36
- Web UI 36