**CDH Installation Guide**

1. **Install latest version of Pega PE. (Current latest version 8.7)**
2. **Download CDH from below file.**

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1. **After personal edition is installed in your machine. Login into system with**

**user** [**administrator@pega.com**](mailto:administrator@pega.com)

**pwd:Install (or ) install with current operator also.**

**Create DSS:**

1. Owning Ruleset - Pega-Engine

Setting Purpose -prconfig/database/databases/ExternalMKTData/defaultSchema/default

Value - externalmktdata

1. Owning Ruleset - Pega-Engine

Setting Purpose - prconfig/database/databases/externalmktdata/datasource/default

Value - java:comp/env/jdbc/PegaRULES

1. Open Postgres DB:

Go to:

Path: C:\PRPCPersonalEdition\pgsql\pgAdmin 4\bin

Double click on pgAdmin4

It will ask for mater password, do reset password, and give **install** as the new password.

5.1. \*\* **Create a new Server:**

Right Click on Server>Create>Server

**We do not need any other setting, Click Save.**

1. Create a new User: all in lower case –

a. Name: “mkt\_user”

b. In definition give password as mkt\_user

c. Privileges: mark yes for all.

d. In Membership select postgres as roles.

e. Parameters Tab, under **name** type **search\_path** select. In **value** write **externalmktdata,** and **Database = postgres**

f. Ignore security and SQL tab. Click on Save.

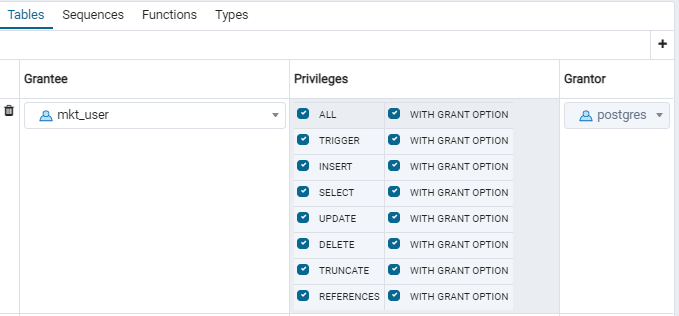
1. Create Schema

Under Expand Database > Right click on Schema > Select create schema

a. In general tab give name as all lower case **externalmktdata,** Owner > Select mkt\_user(the one which we created newly)

b. In Security tab under Grantee select mkt\_user , Privileges : select All for the 1st checkbox list and 1st option for the second check box list, after selection it should look like below

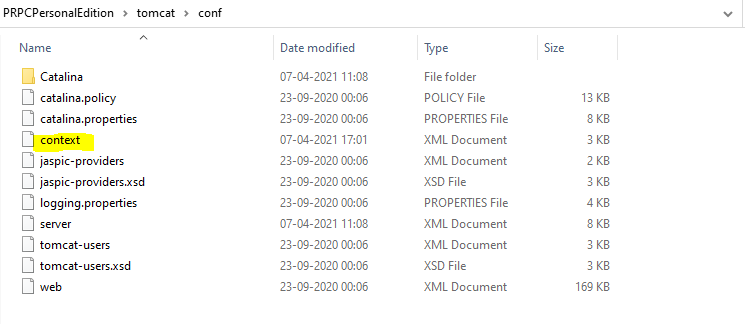
c. In Default



Then click on save.

1. Update context file

Path : C:\PRPCPersonalEdition\tomcat\conf



Replace your context file with below file:



**Save the file. Logout from Pega> restart the server**.

1. After restart we need to create a new database in Pega.

Login using below

**user** [**administrator@pega.com**](mailto:administrator@pega.com)

**pwd:Install**

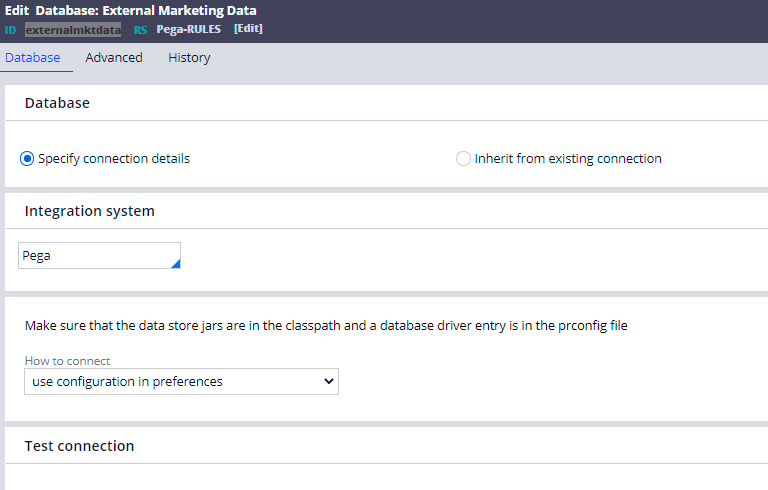
**Navigation**: Record> SysAdmin> right click on database > create new.

a. Give name as externalmktdata (all lower case)

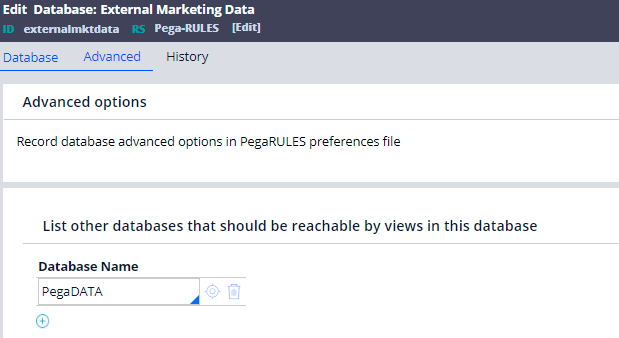
b. integration system as Pega

c. For how to connect: Select “use configuration in preference”.

d. Select Radio button: Specify connection details

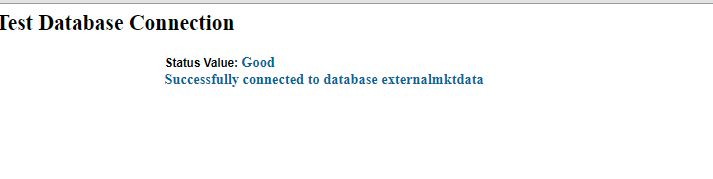


e. Move to Advance Tab add PegaData for database name



f. Once the configuration is completed click on Save.

G. move back to Database tab and click on test connection. We should be able to see below screen.



1. Importing the application bundles

a. To open the Import wizard, in Dev Studio, click Configure Application Distribution Import.

b. Click Choose File, browse for the Rules/PegaCDH\_Core\_0807.zip file from your distribution media, and follow the wizard instructions.

c. Make sure that the check box Automatically run Upgrade Application Schema when import is complete on the Schema changes page is checked before you proceed with the Rules/PegaCDH\_Core\_0807.zip bundle import.

d. Do not select the Enable advanced mode to provide granular control over the import process check box. The check box must be cleared to ensure that you import all components. The wizard identifies differences between the database schema of your current system and the schema of Pega Customer Decision Hub 8.7

**After completing the above step please restart your server.**

1. Configuring and starting agent schedules

Enable the agent schedules for the agents that are included with Pega Customer Decision Hub

a. Log in to Dev Studio as an administrator.

b. Click Records Explorer SysAdmin Agent Schedule.

c. Open the agent schedule of each node on which you want to run the agent. These include the following agents:

1. PegaMKT-Engine
2. PegaMKT-Install
3. PegaMKT-PushNotification
4. (If licensed) PegaMKT-FieldMarketing

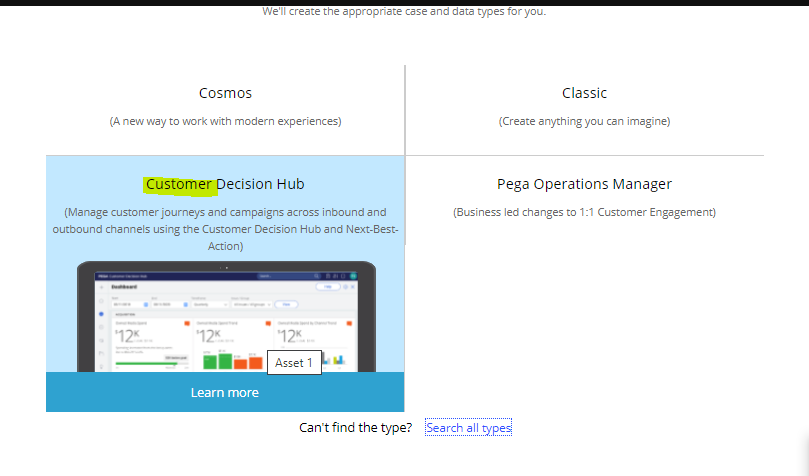
Enable the agent RefreshCampaignOfferStats on only one node to avoid duplicate requests to refresh statistics.

1. ServiceLevelEvents within the Pega-ProCom agent schedule
2. ADMSnapshot within Pega-DecisionEngine
3. RevalidateAndSave within the Pega-ImportExport agent schedule

d. Check Enable this agent and ensure that each individual agent is enabled.

e. Click Save.

1. **\*After above step create your application, build on application should be CDH.**



1. Enabling background processing

Include your application in background processing to enable several functionalities of Pega Customer Decision Hub, such as file and database templates, the processing of event-triggered actions, resilience checks for customer segments, and others.

1. Log in to Dev Studio as an administrator.

2. In the navigation pane of Dev Studio, click Records.

3. Expand the Application Definition category, and then click Application.

4. On the Application tab, open the application that is associated with the PegaNBAM:Agents access group.

5. On the Definition tab, in the Advanced section, select the Include in background processing check box if it is not already selected.

6. After changing the setting, save your changes and restart the pzStandardProcessor queue processor. You do not need to restart the queue processor if Include in background processing was already selected for your application.

a. In Admin Studio, click Resources Queue Processors.

b. Find and restart the pzStandardProcessor queue processor.

7. Optional: To ensure that you added the application to the system runtime context, perform the following steps:

a. In the header of Dev Studio, click Configure System General System Runtime Context.

b. Verify that your application appears in the Applications list.

1. Enabling Pega Customer Decision Hub Marketing Campaign Edition

With Pega Customer Decision Hub Marketing Campaign Edition, you can define segments and schedule traditional batch campaigns, delivering messages across direct mail, email, and SMSs.

To start using the Marketing Campaign Edition, you need to enable the Campaigns menu in your implementation application.

1. Log in to Dev Studio with an administrator account.

2. In the navigation pane of Dev Studio, click Records SysAdmin Application Settings .

3. On the Application Settings tab, search for the EnableCampaignEdition setting in the PegaMKTEngine: ruleset.

4. Click the EnableCampaignEdition row.

5. Save the EnableCampaignEdition setting to the implementation ruleset:

a. On the Application Settings: Campaign edition licensed customers only tab, click Save as. b. On the New tab, in the Add to ruleset field, enter the name of the implementation ruleset. c. Click Create and open.

6. On the Edit Application Settings: Campaign edition licensed customers only tab, set all the production level values to True by selecting the check boxes.

7. Check in your changes:

a. Click Check in.

b. In the Check-in comments field, describe the changes. Enabled marketing campaign edition.

c. Click Check in.

1. Next steps

After the installation is completed, set up your application.