
Chapter 2. UBX Toolkit installation and configuration

To install the UBX Toolkit, download the toolkit file archive and install various scripts and properties files on a server in your local network environment. Update default settings and property files to suit your local network requirements.

The UBX Toolkit consists of various property files and scripts that you install in your local network environment and modify to satisfy your business requirements. The installation and configuration process proceeds as follows.

1. Download the UBX Toolkit from IBM developerWorks as a compressed file archive.
2. Extract the archive to a directory on a local server. Extracting the archive creates local directories that contain UBX Toolkit environment files and configuration property files.
3. Modify UBX Toolkit environment files to reflect paths in your local environment.
4. Register UBX source or destination endpoints by updating specific UBX toolkit configuration properties.
5. (Optional) Encrypt the configuration settings for enhanced security, as required by your business security policy.

Installing the UBX toolkit

Installing the UBX Toolkit involves downloading the source file archive from IBM developerWorks and then modifying environment variables.

Before you begin

Confirm that you have rights to access and edit files on the server where you want to install the UBX Toolkit.

Confirm the locations of the JRE and JDBC database drivers.

Procedure

1. Download the UBX Toolkit files as a compressed archive and extract in a location on a server in your local network environment. The source files are available on IBM developerWorks. Go to:

IBM UBX Toolkit for IBM Marketing Software

Click the link to download either of the following binary files.

- Windows: IBM_Universal_Behavior_Exchange_Toolkit_v1.2_Windows.zip
- Linux or UNIX: IBM_Universal_Behavior_Exchange_Toolkit_v1.2_Unix-Linux.tar.gz

The directory to where you download the files is referenced within the toolkit as CU_HOME.

2. Install and configure the environment files.
 - a. Depending on your operating system, copy and rename <CU_HOME>\bin\example_setenv.bat or example_setenv.sh to setenv.bat or setenv.sh
 - b. Modify the following variables in the setenv file:

- JAVA_HOME: Enter the path to the JRE.
 - CU_HOME: Enter the path to the directory where you extracted the UBX Toolkit files.
 - JDBC_CLASSPATH: Enter the path to the jdbc driver for the database importer.
3. Install the configuration properties and logback files. Copy and rename the default example files that are provided in the conf directory.
 - a. Rename example_logback.xml to be logback.xml.
 - b. Rename example_config.properties to be config.properties.
 - c. Rename example_jdbc.properties to jdbc.properties.

Note: Do not rename config.properties or jdbc.properties after you create them. The UBX Toolkit requires these default configuration files in the CU_HOME directory. If you need to create alternate configuration or data source files, you can create multiple other copies with different names and different values so that you can override the default settings, if necessary.

What to do next

Configure the UBX Toolkit to register the local application as a UBX endpoint.

Depending on your corporate data and network security policies, you can perform additional configurations for enhanced data security.

- Connect to UBX through a web proxy server.
- Encrypt the UBX Toolkit configurations.

Endpoint registration with the UBX Toolkit

The UBX Toolkit provides configuration properties and scripts that can call UBX endpoint registration APIs. Register an endpoint by modifying configuration properties and running the registration script.

The specific configurations and scripts that are required depend on the type of data that you exchange with UBX and on whether the endpoint is a data producer or data consumer.

UBX authentication keys for the UBX Toolkit

UBX requires a user-generated authentication key to indicate that an endpoint has permission to interact with UBX on behalf of a specific authorized UBX user account. UBX recognizes authentication keys generated at the endpoint level and at the UBX account level.

To share event and audience data between UBX endpoints, users must register each endpoint with UBX. During endpoint registration, UBX users generate an authentication key in the UBX user interface and then provide the key to the endpoint provider. A UBX user account typically generates multiple authentication keys.

Each time an endpoint communicates with UBX, the endpoint must submit the authentication key as the authorization bearer or URL parameter in calls to UBX

APIs. UBX compares the authentication key that the endpoint submits to the authentication keys that it recognizes as being created by the UBX user. Each authentication key is unique to a specific UBX account and for use by a single endpoint.

Endpoints do not appear as options in the UBX user interface until the endpoint provider registers with UBX.

When IBM provisions UBX endpoint provider accounts, it generates account-level authentication keys that the endpoint requires to operate across multiple UBX user accounts. Registering audience consumer endpoints with the UBX Toolkit requires an account-level authentication key.

Generating an endpoint-level authentication key

As a UBX user, you generate an endpoint-level authentication key in the UBX user interface. You can enter an endpoint-level authentication key in the UBX Toolkit configuration when you register an endpoint with the UBX Toolkit.

About this task

To register an endpoint in UBX, you must generate an authentication key that is specific to your UBX account. For each endpoint that you register under your UBX account, you must log in to UBX and generate the key through a link in the UBX user interface.

To use the UBX Toolkit to register the endpoint with UBX, you provide the authentication key as a value in the UBX Toolkit configuration. Running the endpoint registration script with the toolkit makes an API call that provides the authentication key to UBX on behalf of the endpoint provider.

Note: To register cloud-based endpoints that are not supported by the UBX Toolkit, you generate the authentication key and submit it directly to the endpoint provider.

You must register each endpoint separately.

Procedure

1. Log into UBX with your UBX account login credentials.
2. On the Endpoints tab, click Register new endpoint. An authentication key displays as an alphanumeric string.
3. Copy the string and save it.

What to do next

Enter the authentication key as a value in the UBX Toolkit configuration. The configuration property that you populate depends on the type of endpoint that you are registering.

Requesting a UBX account-level authentication key

In some cases, you must provide an account-level authentication key as a UBX Toolkit configuration property to use the toolkit to register an endpoint. You must contact the UBX Provisioning team to request an account level authentication key.

Enter the authentication key as a value in the UBX Toolkit configuration. The configuration property that you populate depends on the type of endpoint that you are registering.