cMap for InterAction
LIST EXPORT TOOL
INSTALLATION GUIDE

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Contents

cMap for InterAction – List Export Tool v2.4.x

Introduction

This document is to guide you through the installation of the cMap for InterAction – List Export Tool v2.4.x application.

Pre-Requisites

There are a number of pre-requisites you will require for the installation to complete successfully:

1. LexisNexis InterAction Windows Client v5.5 GA or later
2. Windows Installer 3.1
3. Dot Net Framework v3.5SP1
4. Pre-configuration of the settings.xml file
   → This guide covers how to complete this pre-configuration

LexisNexis InterAction Windows Client

cMap for InterAction – List Export Tool supports all versions of LexisNexis InterAction Windows Client from v5.5 GA onwards. cMap for InterAction – List Export Tool does not work in conjunction with any LexisNexis InterAction Web Client software. Please ensure you are using a suitable version of LexisNexis InterAction Windows client before proceeding with this installation.

Windows Installer v3.1

List Export Tool requires Windows Installer v3.1 to be installed on your system.

Dot Net Framework v3.5SP1

At least Dot Net Framework v3.5SP1 is required to install List Export Tool v2.4.x.

Pre-Configuration

List Export Tool requires some pre-configuration to be completed before it can be installed. Please ensure that this pre-configuration has been completed before commencing the installation.

Details on how to configure the application can be found in the Pre-configuration guide, called 'cMap for InterAction - List Export Tool v2.4.x - Pre-Configuration Guide v1.0.pdf'.

Installation

To install List Export Tool, please follow the steps below.

1. Download and unzip the installation package on the server / desktop on which it is to be installed

2. Run the 'ListExportTool.exe'

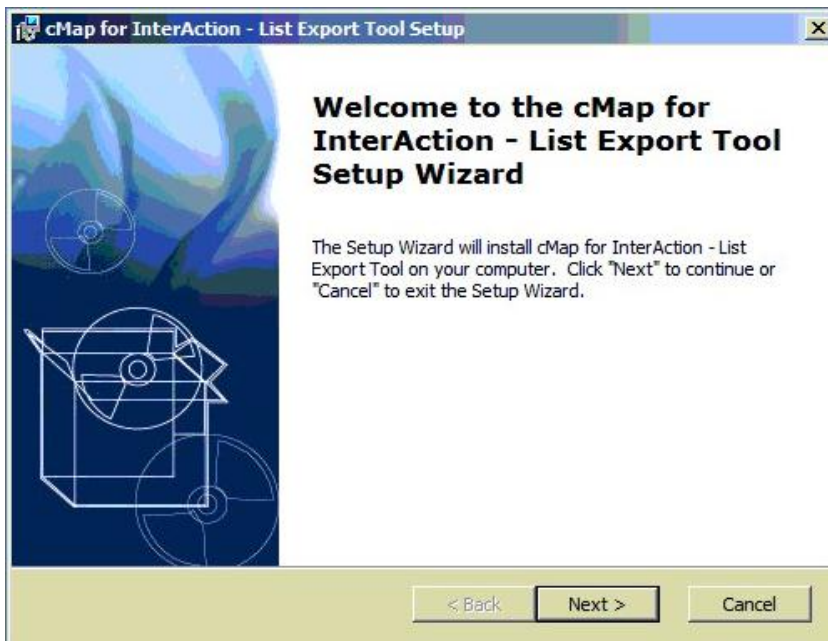3. The welcome screen will appear (Figure 2)

Figure 2: Welcome Screen

4. Click 'Next'

5. You will then be presented with the Installation Options available to you (Figure 3).

   Choosing to create a start menu will create a program group within the start menu and provide a shortcut link to the List Export Tool Application.

   Choosing to create an InterAction Menu Item will install a shortcut within the InterAction Windows Client, under the "Services" menu. This shortcut will allow you to execute the application from within InterAction.

Choosing to create log files will keep an audit trail of all exports carried out from your installation. If you choose this option, you will be able to specify where these log files are stored later in the installation wizard.

Figure 3: Installation Options

6. Once you have made your choices, click 'Next'

7. Step 3 allows you to specify where the application will be installed (Figure 4)
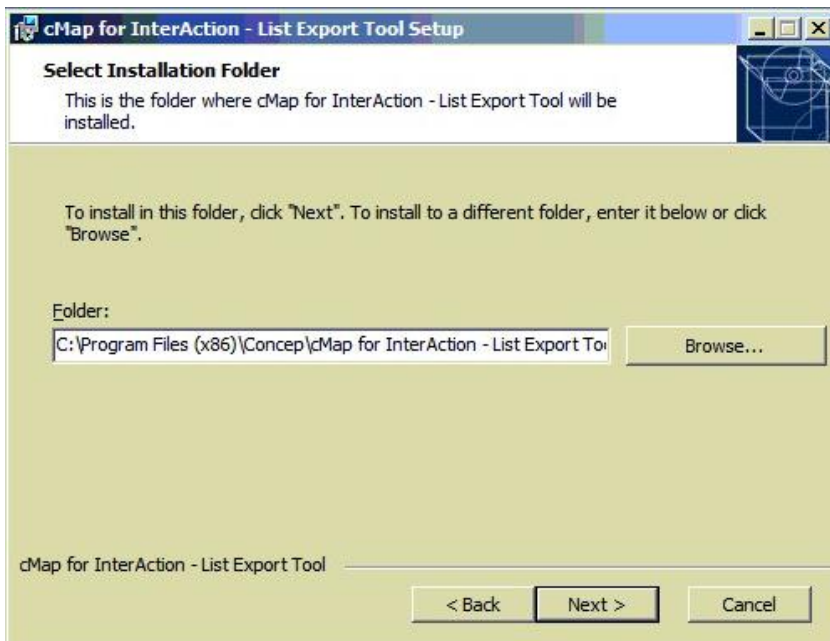
Figure 4: Selecting the Installation Folder

8. Once you are have chosen your preferred location, Click 'Next'

9. Step 4 allows you to specify where the settings file will be installed. (See Figure 5)
    – This is particularly useful if installing in a Citrix environment. If you are not installing in a Citrix environment, the cleanest method is to install the settings file in the same location as the application
    – If you are installing in a Citrix environment, please refer to **section 5** of this guide
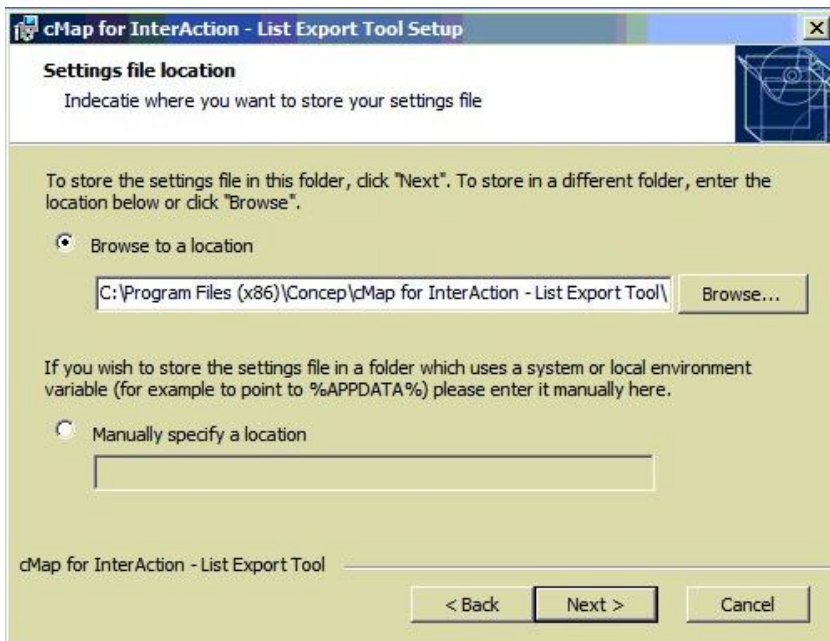
Figure 5: Settings File Location

10. Once you have chosen the location for the settings file, click 'Next'

11. If you have chosen to create log files, step 5 allows you to specify where the log files will be stored (Figure 6)
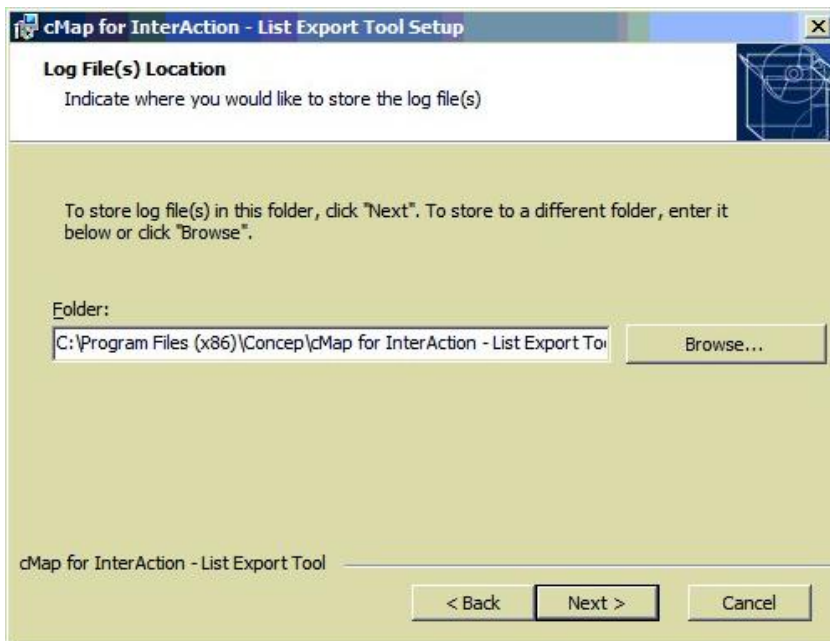
Figure 6: Log File(s) Location

12. Once you are have chosen your preferred location, Click 'Next'

13. cMap for InterAction – List Export Tool is now ready to install (Figure 7)

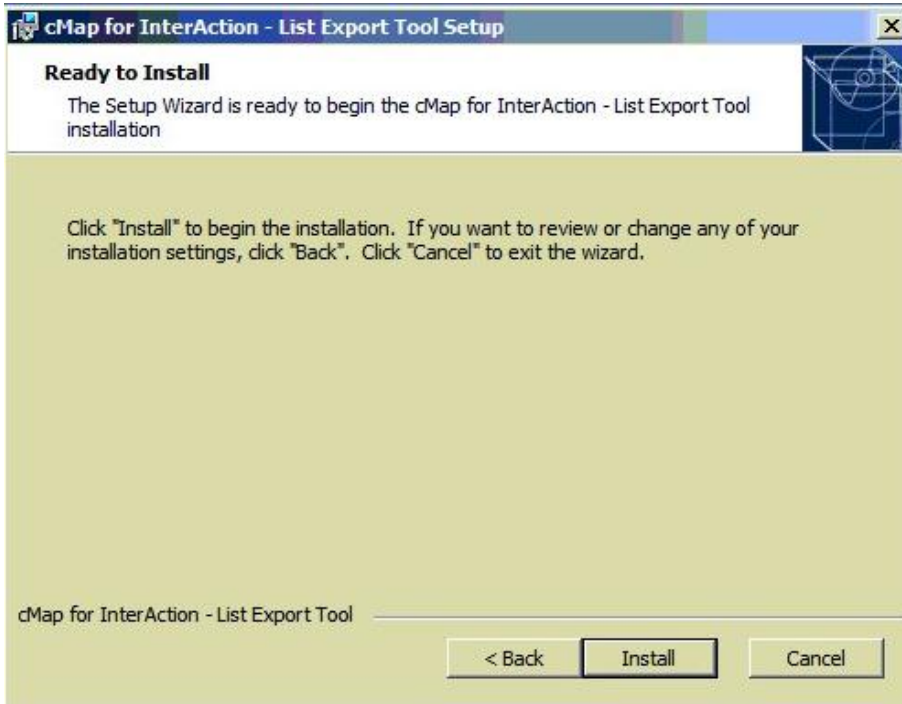Figure 7: Ready to install

14. Click 'Install' (Figure 8)

Figure 8: Installing

cMap for InterAction – List Export Tool will begin installing

15. After a short while, the installer will provide a final notification the installation is complete
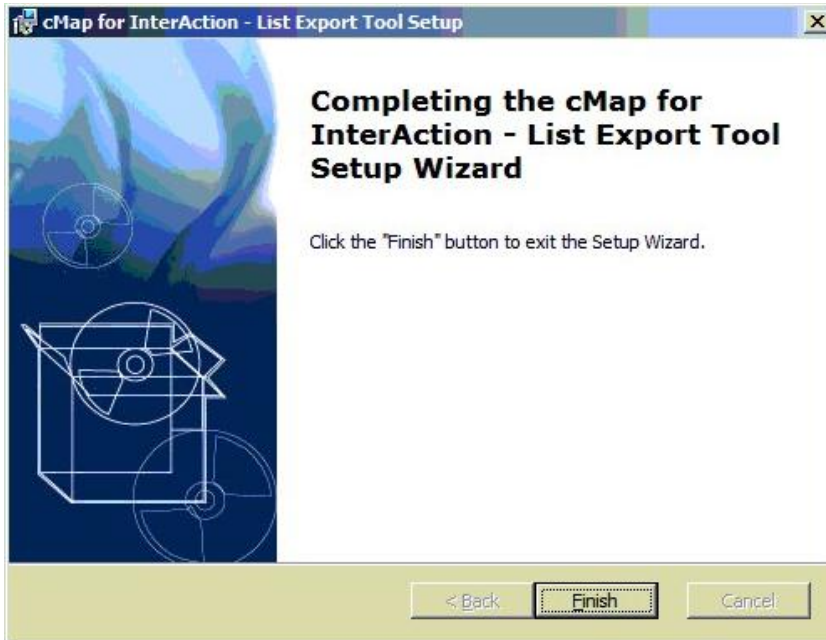
16. Click 'Finish' to complete the installation (Figure 9)

Figure 9: Installation Complete

17. cMap for InterAction – List Export Tool is now installed.

Validating the Installation

Validating the Start Menu Shortcut

To validate whether the Start menu shortcut was installed correctly, please follow these steps:

- Click "Start" at the bottom left of your windows desktop
- Go to "All Programs"
- A folder called "Concep" will now exist
- Hover your mouse over this folder to reveal the "cMap" folder
- The application "cMap – List Export Tool" will appear
- Click this icon to begin the application
- The application will launch

Validating the LexisNexis InterAction Shortcut

To validate whether the LexisNexis InterAction Windows Client Services menu shortcut was installed correctly, please carry out the following steps:

- Launch LexisNexis InterAction Windows Client
- Click Services Menu
- An option labelled "Export to Concep Campaigner" should be visible
- Click this option
- The application will launch

Validating the Log Files

To validate whether the log files feature has been installed. Firstly, look for the location where you have chosen to install. The default location is within the application folder. If there is a folder called "Log Files" within your chosen location, this is the first indication that the log file feature has been installed.

The second way to validate is to simply carry out an export. Once this has been achieved, two files appear. One is an xml file – containing all the data that was exported – and the second is a log file providing a timestamp of when the export process occurred.

Citrix Deployments

Installing in a Citrix Environment

When installing List Export Tool, it is possible to select the location for the settings.xml file to reside. If you are installing in a Citrix environment, rather than locally, it is important for each user of the application to have their own copy of the settings.xml file. This will:

1. allow you to restrict access to the List Export Tool for specific users
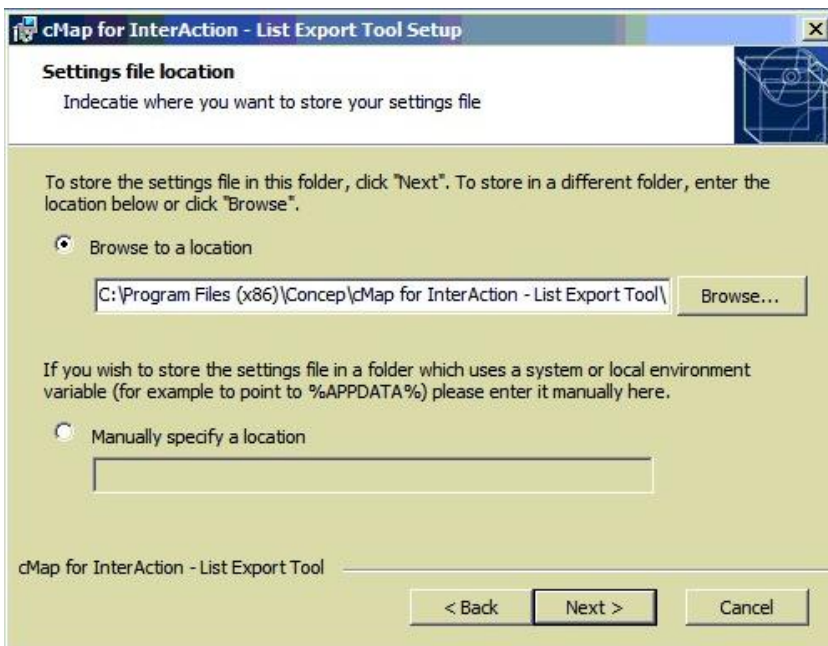2. ensure that a user's 'last used details' are remembered and available for the next export.

Figure 10: Setting File Location

When installing on a client / desktop, the settings.xml file location can be saved to a fixed location (eg C:\Program Files\Concep\cMap for InterAction – List Export Tool\).

When installing in Citrix, it will be appropriate to save it to a folder which uses a system or local environment variable, such as %appdata%\Concep\List Export Tool, (ie c:\documents and settings\username\application data\Concep\List Export Tool). This means that when the List Export Tool is run, it will pick up a user's own version of the settings.xml file, and reference those settings, and save back to it.

For each user who requires access to List Export Tool through Citrix a copy of the default settings.xml file must therefore be saved to the appropriate location (eg %appdata%\Concep\List Export).

They will also need an entry in their IntrActn.ini file, which will allow them to access the List Export Tool through the Windows Client Services menu.

This entry will be of the form:

```
 8      └ AutoExpDllRegistered=YES
 9     ┌┤[Services]
10      │ Service:Generate Activity=
11      │ Service:Duplicate Contact Finder for 2 Folders=
12      │ Service:Duplicate Contact Finder=
13      │ Service:Potential Duplicates Report=
14      │ Service:Administrative Reports=
15      │ Service:Automated Export=
16      │ Service:Broadcast E-mail=
17      └ Service:Export Tool=
18     ┌┤[Service:Automated Export]
19      │ Path=C:\Program Files\Interface Software\InterAction 5\Client\iaexport5.exe
20      │ MenuText=Automated Export
```

Figure 11: IntrActn.ini file

```
103     ┌ EmailPlatform=GROUPWISE
104    ┌┤[Service:Export Tool]
105     │ Path=CmapExportTool.exe
106     │ MenuText=Export Tool
107     │ Directory=C:\Program Files\Concep\cMap for InterAction - List Export Tool
108     └
```

Figure 12: IntrActn.ini file

How to Use cMap for InterAction - List Export Tool

Please refer to the document '**cMap for InterAction - List Export Tool v2.4.x - User Guide 1.0.pdf**' for details on how to use List Export Tool.