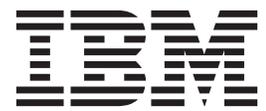


IBM Interact  
Version 9 Release 0  
July 31, 2013

*Release Notes*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 27.

This edition applies to version 9, release 0, modification 0 of IBM Interact and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. System requirements and compatibility

IBM® Interact operates as part of the IBM EMM suite of products.

You can upgrade to Interact 9.0.0 from Interact version 8.5.0 or later. For instructions, see the *IBM Interact Installation Guide*.

### **Where to find complete system requirement and compatibility information**

For a list of IBM product versions compatible with this product, see the *IBM 9.0.0 Product Compatibility Matrix* and any other product compatibility documents posted under Documentation on the IBM Support Portal website: (<https://www.ibm.com/support/entry/portal/documentation>).

For a list of third-party requirements for this product, see the *IBM Enterprise Products Recommended Software Environments and Minimum System Requirements* available under **Help > Product Documentation** when you are logged in to Interact, as well as from the IBM Support Portal website: (<https://www.ibm.com/support/entry/portal/documentation>).



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## Chapter 2. New features and changes in version 9.0.0

### Interact behavioral event handling

Interact can now personalize offers that are based on patterns of visitor activity, referred to as *event patterns*. Using event patterns (also referred to as "behavior triggers"), you can test whether an event or a collection of events is occurring during an interaction and, if the specified pattern of event occurrences is met, to trigger one or more actions in response.

For example, on a website, a pattern of events might include any combination of pages that are visited (including the number of times a page is visited), documents that are downloaded, media that are viewed, and search terms that are used. As another example, in a call center, events such as the reason for the interaction, or the actual service request that is initiated during the interaction (such as address changes or product inquiries) might be used to identify an event pattern that could trigger an action. All of these events, when they are taken together, identify a certain pattern of behavior, and these event patterns can now trigger actions in Interact session. The triggered actions can also include an External Callout.

The implementation of event patterns also includes a feature that is called *trigger events*. A trigger event is an event that is triggered by another event or event pattern. Another way to say that is that one event can, as its action, trigger another event. The trigger event can be an event that is already defined (on the Events tab within Interact), or an event that is recognized as part of a pattern and treated as an event with the specified action. For example, you might use the triggered event feature in a case where the `KitchenAppliancePageVisited` event occurs. You might decide that one of the actions that are triggered by that event is that the `KitchenRenovationsPageVisited` event also occurs, or other events, as well as their subsequent actions.

You can use both standard and trigger events in definitions of event patterns. After you create event patterns, they become available for use in interactive flowcharts.

To see the changes that are implemented to support event patterns, see the Events tab for an interactive channel.

(RTC616, RTC716, RTC717, RTC718, RTC719)

### Randomizing offer presentation

In prior releases of Interact, when multiple offers in the same rule group on the Strategy tab have the same score, Interact returns the offer with the lowest offer ID. With this release, Interact randomizes among the offers that have equal scores, making it less likely that a visitor sees the same offer across multiple interactions.

Randomizing offer presentation is enabled by default, but is controlled by the `Interact | offerserving | offerTieBreakMethod` configuration property on the Interact runtime server. (RTC621)

## REST API support

Prior releases of Interact provide access to its application programming interface (API) through SOAP and Java Serialization over HTTP. With this release, Interact supports an additional industry-standard messaging approach called REST (Representational State Transfer). The *RESTful* (conforming to REST constraints) implementation that is used by the Interact API lets you exchange structured JSON messages over HTTP with fast response times and low processing and resource requirements.

There are two Interact classes specific to the REST API: `RestClientConnector`, which serves as a helper to connect to an Interact run time instance via REST with the format of JSON, and `RestFieldConstants`, which describes the underlying format of the JSON message that is used for API requests and responses.

After you install the Interact design time server, a sample REST client is provided at `Interact_Home/samples/javaApi/InteractRestClient.java`. Although the sample code is a simple example, it provides a good starting point for demonstrating how the REST API is used.

For a complete description of the REST API classes along with all other Interact API information, see the Javadoc that is installed on the runtime server at `Interact_Home/docs/apiJavaDoc`.

(RTC721)

## WSDL Changes

Over the course of several releases of Interact, the WSDL (Web Services Description Language) support used to describe the available web services was updated. For the latest WSDL information, you can view the XML files in your Interact home directory in the following location:

- `<Interact_home>/conf/InteractService.wsdl`
- `<Interact_home>/conf/InteractAdminService.wsdl`

Specifically, be aware of the following changes:

- In Interact 8.6.0.2 and higher, the SOAP API WSDL is incompatible with previous versions because of enhancements.
- In Interact 8.6.0.3, WSDL is slightly different from 8.6.0.2. However, 8.6.0.2 WSDL works with Interact 8.6.0.3 without changes.
- See the 8.6.0.2 and 8.6.0.3 fix pack readme files for more details on specific WSDL changes relating to `NameValuePairImpl` and mandatory `minOccurs` parameters (such as `relyOnExistingSession` and `debug`).

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## Chapter 3. Fixed defects

The following table lists defects that are fixed in Interact 9.0.0.

Issue ID	Description
DEF052233, DEF063147	<p>Clicking <b>Help</b> from the Campaign Analytics/Analysis pages did not display Help for any of the Interact reports. A help window opened, but contained Campaign report information instead.</p> <p>This problem is addressed in this release.</p>
DEF063100, RTC6953	<p>Interact upgrade scripts execution console were displaying incorrect information. This wording is now correct.</p>
DEF063504	<p>Users were able to undeploy an interactive channel version multiple times because the Active Deployments list was not refreshed each time. The list now refreshes with each update now.</p>
DEF063617	<p>In prior releases, specifying an Audience Level for offer blacklisting or other table-driven features was case-sensitive (that is, it was necessary to specify the audience level name matching the case with which it was defined). In this release, the audience level is not case-sensitive for all table driven features.</p>
VER00911	<p>In some cases where an audience switch was performed within a single Interact session, the list of offers that were presented following the switch was incorrect for that audience level. This issue no longer occurs.</p>
DEF063106	<p>In some instances, multiple test runs of interactive flowcharts, especially when performed concurrently by multiple users, resulted in "out of memory" errors. This was occurring because memory was not being released after the test flowchart runs. This memory leak no longer occurs.</p>
RTC9289, RTC7984	<p>Editing advanced rules on the interactive channel Strategy tab sometimes resulted in a "Error occurred while parsing expression: Empty expression" message. The error occurred while checking the syntax of the advanced rules, and is addressed in this release.</p>
RTC7041	<p>In certain instances, parameter values that were passed into the Interact API in a <code>startSession</code> call were not being considered by <code>getOffers</code> API calls. The result was that applying an Advanced rule was using a value from the profile table for the parameter instead of the value that is passed in as part of the <code>startSession</code> call. This issue is addressed in this release.</p>
RTC11445	<p>In some cases, custom attributes that are defined for an offer to be used within an interaction strategy were not displayed correctly, specifically when the offer was being defined for an eligible segment. The issue caused some offer attributes to be duplicated, while others were not displayed at all. This issue is addressed in this release.</p>
RTC9522	<p>In calls to the Interact learning API, null values were not returned correctly when table-driven offer attributes were used, affecting the learning API session data. This issue is addressed in this release.</p>
RTC8520	<p>Previously, users were seeing inconsistent results in multiple interactive flowchart runs where user variables set by one process box were being referred to by another process box in the flowchart. This error occurred because the value of the user variable from one flowchart run was sometimes carrying over to the next execution of the same flowchart. This issue is fixed in this release.</p>



## Chapter 4. Known issues

The following table lists issues in Interact 9.0.0.

Issue	Issue ID	Description
If you are using built-in learning, Interact uses most recent learning attributes across all interactive channels	N/A	Learning attributes are defined across all interactive channels. If you have a single Interact runtime server for multiple interactive channels, the Interact runtime server uses the most recently deployed learning attributes. For example, suppose the scenarios for your call center track learning attributes A, B, and C, and the scenarios for your website track learning attributes C, D, and E. If you update the interactive channel for your website, changes to learning attribute C affects both the call center and the website.
If you remove an audience level, contact and response history utility might fail.	N/A	The contact and response history module attempts to transfer data for all audience levels that are listed in UACI_CHRHAudMap. If you remove an audience level, you must remove all associated entries from the UACI_CHRHAudMap table or the contact and response history utility will fail.
DB2® might return erroneous error when you are using a database load utility.	N/A	In some cases, the database load utility returns an error even though the load was completed with only a warning. For example, if the value of a column exceeds the column's width, it is truncated before the load. In these cases, look at the database load utility log files and make sure that the records were not inserted before you rename the directory to rerun. You can determine the number of rows that are loaded by reviewing the db2loader.xxx.log file, specifically the line Number of rows committed = xxx.
Channel Event Summary Report may display incorrect data if you rename an event	N/A	If you rename an event, the new name might not display correctly in the report.
DB2 Loader not working with Non-ASCII Audience name	DEF054920, RTC7980	DB2 file-based loader for contact and response history logging is not supported if Audience Level contains non-ASCII characters. To work around this issue, either make sure Audience Levels use only ASCII characters, or use a memory cache instead of the file-based loader.
Cannot export from a Snapshot or MailList process to a database table with a non-ASCII name.	RTC10145	If you export data from a Snapshot or MailList process, and you select <b>Database Table</b> as the <b>Export to</b> option, naming the new table with non-ASCII characters results in an export failure, and an error code 11506 may also be displayed. To work around this issue, use only ASCII characters to name the export database table.
Cannot export persistent derived fields from a Snapshot process when the locale is not English.	RTC11682	If you configure a Select process box to create a persistent derived field, run that process, and connect it as input to a Snapshot process box, the persistent derived field will not be available in the <b>Fields to Snapshot</b> list on the Snapshot of the Snapshot process box. This issue occurs only if the locale is set to any non-English locale.

Issue	Issue ID	Description
SiteMinder access is not supported for deployment of Interactive Channels	DEF054926, ENH11491	SiteMinder access is not supported for deployment of Interactive Channels. For Interact runtime deployment, you must use a user ID and password that has been explicitly created in the Marketing Platform database.
Changing session and campaign owners in Campaign causes associated interactive flowcharts and interactive sessions to stop working	DEF055155, RTC11348	If you change the ownership of a session or campaign in Campaign, the associated interactive flowcharts and interactive sessions do not work in Interact.
IPv6 support is not included in this release.	DEF061723, RTC11350	Use of Internet Protocol v6 (IPv6) is not supported in this release. Only IPv4 connections are supported.
Cannot delete a campaign even after deleting the interaction strategy.	DEF062936	<p>In some cases, users cannot delete a campaign even after the interaction strategy with which the campaign is associated is deleted. The ac_web.log file may contain a message similar to "DELETE statement conflicted with the REFERENCE constraint "iTrmtRuleInv_FK3". The conflict occurred in database "Automator_UC", table "dbo.UACI_TrmtRuleInv", column 'CellID' in this situation.</p> <p>In this situation, where even the interactive flowchart is undeployed and deleted, and the strategy is deleted, the campaign cannot be deleted because it was part of a strategy that was deployed, and therefore historical data exists for that campaign that is used for reporting. This may be addressed in a future release.</p>
Exception displayed while copying an interaction strategy into a folder.	DEF063013, RTC9030	When you try to copy an interaction strategy, if you specify a folder as the destination an error message similar to Could not execute JDBC batch update; nested exception is org.hibernate.exception.ConstraintViolationException: Could not execute JDBC batch update is displayed. In reality, the error should indicate that you need to specify a campaign as the copy destination, rather than a folder.
LearningAggregatorThread errors appear in the logs in cases where some profile table attributes have null values.	RTC11509	Using the learning aggregator (a process that reads the data from the staging table, compiles it, and writes it to a table so that the learning module can use it) in the Interact runtime, there are cases where the UACI_OfferStatsTx table has null attribute values. In some situations, the learning aggregation process does not handle the null attribute values properly and errors occur. This issue is addressed in a future release.

## Chapter 5. Known limitations

The following table lists known limitations in Interact 9.0.0.

Issue	Number	Description
Offers in treatment rules do not appear in Interact report	N/A	If you do not select offers created with an offer template with <b>Allow offers created from this template to be used in real-time interactions</b> selected, Interact cannot collect the correct data for reporting.
Test run result tables are not dropped from Interact test run tables	N/A	When you run a test of an interactive flowchart, Interact creates four tables in your test run tables for each interactive flowchart. These tables are not deleted if you delete the interactive flowchart.
SOAP client does not release threads	N/A	The SOAP client leaves sockets in a CLOSE_WAIT state instead of closing them. This is a known issue with the Axis2 SOAP client. See <a href="http://issues.apache.org/jira/browse/AXIS2-2883">http://issues.apache.org/jira/browse/AXIS2-2883</a> for details.
Cannot stop an interactive flowchart test run	N/A	You cannot stop or pause an interactive flowchart test run. Test runs are designed to run on a subset of data, for example hundreds of rows. You can configure the size of your test run in the Interaction process. See the <i>IBM Interact User's Guide</i> for details.
Interact interactive flowcharts support a subset of Campaign macros.	DEF057366, ENH11494	By design, interactive flowcharts support (and make available for selection) only a subset of the macros available on batch flowcharts. On an interactive flowchart, in any Select or decision process boxes where you want to use a macro that is not supported (for example, the between operator, as in "AGE between 1 and 18"), an error message "Function or operation not supported" appears when you check the syntax. This is expected behavior.
Test run does not change value of user variables in design time	DEF030254	If you perform a test run of an interactive flowchart that contains a user variable, the value of the variable does not change in the design environment (IBM Campaign). In runtime, you can use a session name-value pair to view the user variable current value.
Distributed caching in hybrid architecture is not supported	DEF049665	Interact does not support distributed caching in architectures that use a combination of operating systems on different instances of the runtime environment (for example, an instance on UNIX with Oracle and an instance on Windows with SQL Server). To support various components, including ETL capabilities, Interact requires that all instances of the runtime environment be of the same operating system type.
Raw SQL options are not supported in Interact flowcharts	DEF049991	Using custom macros with expression type "Raw SQL Selecting ID List" or "Raw SQL Selecting ID List+Value" in any processes in an interactive flowchart results in Error 11324.

Issue	Number	Description
Known limitation with German character ß	DEF051037	<p>The German Eszett character ß (Unicode U+00DF) is not supported in Interact.</p> <ul style="list-style-type: none"> <li>Interact initialization fails when an Audience is mapped to a table that contains this character.</li> <li>An eligible Segment name that contains the character displays incorrectly when the segment is added to an interaction strategy.</li> </ul>
UACI_EligStat table logs offers with effective dates that should have been excluded by effDateBehavior>	DEF054281	<p>Offers with effective dates that falls out of the (effectiveDateBehavior + effectiveDateGracePeriodOfferAttr) are being logged as eligible offers in the UACI_EligStat table. The parameter specified in effectiveDateGracePeriodOfferAttr is not dynamic therefore if you include a "Grace_Period" attribute in effectiveDateGracePeriodOfferAttr and this is included in offers, every time the value for this parameter is changed in the offer, it requires redeployment of the interactive channel.</p>
Constraint state and in-memory caches are lost on restarting Interact runtime server.	DEF057040	<p>If the Interact runtime server is restarted for any reason, the most recent constraint state (stored in memory, for performance reasons) and any in-memory cache data is lost.</p>
Offer constraints do not work as expected when multiple offer constraint rules are added in one interactive channel for same set of offers.	DEF057081	<p>Interact currently does not support multiple constraints to be applied independently over different intervals of time for a specific deployment. Offers that fall under multiple constraints will follow the most restrictive of the constraints.</p>
Modifying constraint parameters (such as start date or maximum number of offers per interval) results in changes to how the offers are served using that constraint.	DEF057070, DEF057076	<p>Modifying the settings may affect constraint results in several ways:</p> <ul style="list-style-type: none"> <li>Changing the start date of an offer constraint midstream may result in the counter being reset to zero. This occurs because when the startTime changes, the interval is recalculated and may yield a different interval, so the count may be reset.</li> <li>On the Interact Constraint State page, the <b>Current count for this interval</b> data does not update if you change the offer constraint's start date to an earlier date. This issue occurs because, when the start time is changed, the interval must also be recalculated. The constraint state is updated correctly after that initial recalculation.</li> </ul> <p>For more information about how the constraint parameters affect the outcome, see the <i>IBM Interact User's Guide</i>.</p>

Issue	Number	Description
When issuing the <code>getoffersForMultipleInteractionPoints</code> call in the Interact API, the top-level attribute requirements can accept at most one attribute.	DEF057693	<p>For example, if you set up offers in an Interactive Channel and execute a <code>getoffersForMultipleInteractionPoints()</code> API call using the Offer Attribute with OfferType values "Bank Account" and "Insurance".</p> <p>For an eligible segment, 3 offers are assigned: 2 offers with an offer type of "Bank Account" and 1 with an offer type of "Insurance". The following <code>getoffersForMultipleInteractionPoints()</code> API call would produce <i>incorrect</i> results:</p> <pre>{DIP1,3,1,(2,Offertype=Bank account string) (1,Offertype=Insurance string)}</pre> <p>This call would return only 2 offers with an offer type of "Bank Account."</p> <p>The following call would correctly return the wanted output:</p> <pre>{DIP1,3,1,(3,,(2,Offertype=Bank account string) (1,Offertype=Insurance string))}</pre>
Deployment successful even if interactive flowchart contains an unconfigured process	DEF030956	If you make some configuration change which places processes in interactive flowcharts into an unconfigured state, and you have deployed the interactive flowchart in the past, the interactive flowchart will deploy. Interactive flowcharts with unconfigured processes should not deploy.
Existing installer properties files are deleted after Marketing Platform installation in silent mode	DEF042448	If a previous installation in UI mode was performed, the <code>installer.properties</code> and <code>installer_uep.properties</code> files are wiped out after you then perform Platform installation in silent mode.
WebConnector does not pick up default configuration when trying to save from GUI	DEF052958	WebConnector does not set the default values for fields when saving from the GUI.
Test Run shows results from first schema when 2 schemas are present	DEF054970, DEF055064	If more than one schema is present, test run results are from the schema that comes first alphabetically.
Validate flowchart fails when Mail List process is configured	DEF055021	"Validate Flowchart" fails to validate if a Flowchart Template created from a Batch Flowchart having MailList process is added into an interactive flowchart. "Validate Flowchart" displays "No errors detected in flowchart configuration". To avoid this problem, do not include batch flowchart templates in interactive flowcharts.
Removing a learning attribute from the model deletes the historical data for that attribute.	DEF058996	This occurs as part of the learning feature self-maintenance, to clear out unnecessary data. In the situation where you want to add back the attribute that was removed, the Learning system will learn again from scratch for that attribute (rather than rely on old history data). If you want to keep the history for an attribute rather than allowing the system to delete it, add it to the global setting, and then avoid using it by creating a learning model that does not use that attribute, and assign at the Interactive Channel level.
Offer parameterization does not support Date type fields.	RTC7354	When you are using the Offer Parameterization feature, if you use a table-driven offer, an incorrect date value is displayed in the offer attribute. To avoid this problem, do not use date fields in parameterized offers.



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## Chapter 6. New features in earlier releases

This section contains changes in earlier 8.x releases of IBM Interact for reference purposes. For more detailed instructions on using these features, see the Interact documentation.

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### New features and changes in version 8.6.0

#### Interact integration with IBM Digital Recommendations for product recommendations

Interact can now combine its sophisticated approach to offer personalization with IBM Digital Recommendations scalable product recommendation solutions to provide optimal offer and product information in customer interactions.

You can now customize your web pages to first call Interact for the offers to present to a visitor, which then use an API call to send a product category ID to Digital Recommendations to retrieve the most popular product recommendations for that offer. For example, you might configure a page so that Interact provides the best offer for the specific visitor (10% off all appliances), while Digital Recommendations provides the best product recommendations for that offer (the most popular home appliances for the specific category ID),

For additional information, see the *IBM Interact Administrator's Guide* and the sample application installed in `<Interact_home>/samples/IntelligentOfferIntegration`, available for use as a demonstration and a starting point for your own web pages.

(ENH11607)

#### New deployment management and versioning

For interactive channels, deployment information has been moved to a separate Deployment tab. The Deployment tab provides an enhanced user interface for managing deployments, including the following features:

- **View and undeploy active deployments.** Active deployment view provides immediate information about the current deployment, and allows you to undeploy the selected deployment as wanted.
- **View pending changes.** Pending Changes view lets you see what changes are marked for deployment but are not yet deployed, and lets you deploy the changes or only the global settings as needed to the targeted server group.
- **Roll back previous deployments.** The Deployment History section lets you select and redeploy earlier versions of a deployment, or reload and modify earlier components (flowcharts and strategy tabs).
- **Reload and modify previous Design Time components.** You can use the Deployment tab to reload interactive channels, flowcharts, and interactive strategies from previous deployments to view or modify them before redeploying.
- **Custom views.** Filter the deployment history list to show only the information that you want, such as filtering out all but the deployments to a particular

server group, or only the deployments that succeeded. You can also sort lists on specific columns or on multiple combinations of columns to view deployment information exactly as needed.

(ENH11608)

## External learning enhancements

In previous releases, Interact pre-built learning could not be used alongside custom learning requirements. Now, select functions of the Interact pre-built learning implementation is accessible via a new set of API calls to let you use built-in learning methods in your external learning algorithm. See the Javadocs installed in `<Interact_home>/docs/learningOptimizerJavaDocs` for additional technical details.

(ENH11609)

## Profile Data Service: hierarchical profile data retrieved via EXTERNALCALLOUT

You can now use the EXTERNALCALLOUT API function to import hierarchical profile data into Interact runtime sessions. This allows you to pull data from various sources, including web services. (ENH11610)

## Interaction strategy tab enhancements

The Interaction Strategy tab has been redesigned to add features and to enhance ease-of-use. Improvements include:

- **New view options.** It is now much easier to manage large numbers of rules, offers, zones, segments, and so on, through the use of list filtering and multiple selections of segments and zones.
- **Apply options to many treatment rules at the same time.** You can now select multiple segments or zones in the list to assign the same set of advanced options, learning model customization, and parameterized offer attributes to all selected treatment rules at the same time.
- **Enable, disable, delete many treatment rules at the same time.** The same selection features allow enabling, disabling, and deleting multiple treatment rules in a single step.
- **Drag-and-drop interface.** The drag-and-drop interface has been enhanced, and now allows adding zones in addition to segments and offers to the rules. You can also select and drag more than one item onto the list of rules at the same time.
- **New views:** you can now view treatment rules by segment or by zone, as well as added information and filtering.
- **Added the ability to copy an interaction strategy to another campaign** through the use of the Copy Interaction Strategy icon.
- **Removed the automatic save feature to prevent unwanted changes.** You must now explicitly save your changes to the strategy tab, or cancel to discard unwanted modifications.

(ENH11611)

## Enhanced parameterized offers

You can use offer parameterization to personalize a generic offer to individuals using attributes that are specific to the individual and session. You can now

configure parameterized offers on the Strategy tab, as part of a treatment rule after an offer is mapped to a segment and zone. Parameterized offer values will be specific to the treatment rule.

Note that using the new strategy tab features, you can select multiple treatment rules and modify common parameters at the same time.

You will also be able to set the parameterized values using the Global Offers, Whitelist, and OffersBySQL tables.

(ENH11612)

## Reporting enhancements

The following report enhancements have been provided with this release, if you are using the optional Interact Reports Pack:

- **Zone Performance Report by Offer.** This report, available by selecting **Analytics > Campaign Analytics**, clicking **Interact Reports**, and then clicking **Zone Performance**, lets you see how offers are performing by zone.
- **Cell Performance Report filter.** The Interact Cell Performance report has been enhanced so that you can run it for only the items you select, to help you improve the response rate of your interactive strategies. This enhancement allows you to filter the data on a specific cell code, more focused than the original report.

(ENH11254, ENH11253)

## Secure RMI protocol

Interact currently provides two methods to retrieve JMX statistics: RMI and JMXMP (configurable through the Marketing Platform configuration. Previously, only JMXMP enabled secure access (requiring a Marketing Platform user name and password to retrieve JMX statistics). With this release, that level of security is now supported for RMI as well.

You can configure secure RMI in the Marketing Platform configuration settings on the Interact | monitoring page, by setting protocol to RMI, and enableSecurity to TRUE.

(ENH11488)

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## New features and changes in version 8.5.0

### Interact List process box added to batch flowcharts in Campaign

A new process box has been added to Campaign batch flowcharts to allow users to easily define the tables containing candidate offers to be served by the Interact Runtime server. The new process box, called Interact List, operates in a similar manner to a Call List or Mail List process box. Use the Interact List process box on a batch flowchart to determine the offers that will be served to customers by the runtime server, including the following choices:

- Offer suppression at an individual level (a "black list")
- Offer assignment at an individual level (a "white list," or score override)
- Offer assignment at an audience level (global or default offers)

- Offer assignment by custom SQL query

The runtime server has access to the output from this process when you deploy the interactive campaign. Note that a batch flowchart may contain multiple instances of the Interact List process box. (ENH10375)

## **Enhanced Learning (ENH10650,ENH10651,ENH10652,ENH10654)**

The Interact Learning feature has been enhanced in the following ways:

- In addition to the Global learning model already existing in Interact, you can now enable learning and customize learning attributes at the Interactive Channel, Zone, and Rule Group level. Each of those levels can have its own set of custom learning models. This feature is also referred to as "self-learning." The global settings for learning are inherited in the following order: Global, Interactive Channel, Zone, Rule Group, with each subsequent level having the option of adding to or overriding the inherited settings.
- Learning Observation Mode.  
Previously, Interact could not collect learning statistics unless learning was specifically enabled. Beginning in this release, Learning Observation Mode allows Interact to collect learning statistics based on a pre-defined learning model (including the Global model) even when you are not using Interact Learning to arbitrate offers.
- Self-learning Learning Reports. (ENH10653)  
A new report has been added to support the new self-learning models described above. Marketers can now run the Learning Model Report Analysis report in the Interact Design Time environment to compare performance of two learning models over a specified period of time.

## **Web Connector (ENH09370)**

The Web Connector enables web pages to make calls to Interact for real-time offer personalization without having to implement low-level Java™ or SOAP calls to the Interact server. The Web Connector manages offer arbitration, presentation, and contact/response history through two key processes: Page Load, which serves the web page with personalized offers, and Offer Click Through, which captures offer click-through and re-directs it to the specified landing page.

On your web page at load time, embedded JavaScript code links to the Web Connector, which then uses the Interact API to return a personalized offer list, which is then added to your web page in the form of HTML and other markup fragments as needed. When a user clicks a link, it's passed to the Web Connector which uses Interact to determine the correct target URL to which the user is then redirected.

## **Message Connector (ENH10655,ENH10656,ENH10657)**

The Interact Message Connector enables email (and other electronic media) to make calls to Interact for offer personalization at open-time and click-through, determining the offer arbitration and contact/response history through the <img> tags (to retrieve personalized offers for email at open) and <href> tags, which capture click-through to redirect the user to landing pages.

## Offer Constraints (ENH10646,ENH10647)

The Offer Constraints feature allows organizations to limit and manage distribution of offer impressions, limiting the number of times an offer or a collection of offers can be presented over defined periods of time. For example, you might want to suppress an offer after a predefined quota of impressions (such as a certain number of impressions in one day) has been met, or to evenly distribute offer impressions over a period of time.

## Offer de-duplication (ENH10649)

The offer de-duplication policy enhances the efficiency with which Interact removes duplicate offers from requests for multiple interaction points. To accomplish this, a new call has been added to the Interact API called `getOffersForMultipleInteractionPoints`, which retrieves a list of offers that spans a list of specified interaction points. The API call also specifies whether the Interact server should apply de-duplication to the returned list.

## Performance enhancements across Interact

Numerous performance enhancements have been implemented across all of IBM Interact, involving some of the following areas:

- Contact history session caching and other file-based cache writing (ENH10959, DEF059773, DEF059774)
- Duplicate response history entries in ETL queries are handled more efficiently (DEF055886)
- Improved memory handling for Learning (DEF059772)
- Learning aggregation in general is handled more efficiently (DEF057236)
- OfferBySQL performance has been enhanced (DEF055126)

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## New features and changes in version 8.2.0

### Offer marketplace enhancements

The following enhancements have been made in Interact 8.2.0 to support working with large numbers of offers:

- Ability to use SQL queries to get a desired set of candidate offers. `OffersBySQL` allows users to configure SQL to query a table or tables, to which offer lists or offers have been written, at run time.
- New command line tool for deploying candidate offers. A Campaign batch flowchart can be configured to run on a periodic basis. When the flowchart run completes, a trigger can be called to initialize deployment of the offers in the `OffersBySQL` table.

### How to use the `OffersBySQL` feature

Basic steps for using the `OffersBySQL` feature are as follows:

1. Organize offers in folders or in offer lists.
2. Using Campaign batch features, or any external ETL process, populate the `UACI_ICBatchOffers` table with the final list of candidate offers.
3. Deploy the interact channel using a trigger.
4. On the run time side:

Configure SQL to be called by creating an SQL template under configuration: Interact/profile/audienceLevels/<AudienceLevel>/offers By Raw SQL.

- SQL may contain references to variable names that are part of the visitor's session data (profile). For example, "select \* from MyOffers where category = \${preferredCategory}" will rely on the session containing a variable named preferredCategory.
- SQL should be configured to query the offer tables generated in Step 2 above.

The execution of the SQL will happen for every startSession call if the offersBySQL feature is enabled.

To have the execution occur for every getOffers call, a postEvent may be called prior to getOffers with the parameter UACIQueryOffersBySQL set to 1. The getOffers call (and all subsequent getOffers) will execute the SQL.

To execute a different SQL, set the value of the parameter UACIOffersBySQLTemplate to the name of the preferred SQL template.

### About the command line tool

The command line tool (runDeployment.sh/.bat) can be found under the Interact Design Time install directory tools/deployment. The usage of the script is simply: runDeployment <propertiesFile> for each interactive channel/server group deployment combination.

A sample properties file called deployment.properties outlines all the possible parameters and is available in the tools/deployment folder.

### New configuration parameters

The following new configuration parameters are introduced in Interact 8.2 to support the OffersBySQL feature.

Table 1. New Design Time configuration parameters

Path name	Description	Default
Interact/whitelist/<audienceLevel>/offersBySql/defaultCellCode	The default cell code to be used for any offer in the OffersBySQL table(s) that has a null value in the cell code column (or if the cell code column is missing altogether. This value must be a valid cell code.	None

Table 2. New Run Time configuration parameters

Path name	Description	Default
profile/audienceLevels/<AudienceLevel>/offers By Raw SQL/enableOffersByRawSQL	Boolean flag to enable the offersBySQL feature for this audience level.	FALSE

Table 2. New Run Time configuration parameters (continued)

Path name	Description	Default
profile/audienceLevels/<AudienceLevel>/offers By Raw SQL/cacheSize	Size of cache; used to store results of the OfferBySQL queries. NOTE: Using cache may have negative impact if query results are unique for most sessions.	-1 (off)
profile/audienceLevels/<AudienceLevel>/offers By Raw SQL/cacheLifeInMinutes	The number of minutes before the system will clear the cache to avoid staleness.	-1 (off)
profile/audienceLevels/<AudienceLevel>/offers By Raw SQL/defaultSQLTemplate	The name of the SQL template to use if not specified via the API	None
profile/audienceLevels/<AudienceLevel>/offers By Raw SQL/<SQLTemplate>/name	The name of the SQL template.	None

## New distance macro

The new Distance macro, available in both IBM Campaign and IBM Interact, supports calculating the distance between two geographical points, when two pairs of latitude and longitude coordinates are provided. For complete details, refer to the *IBM Macros for IBM EMM User's Guide*.

## Ability to set JDBC fetchSize when retrieving records from staging tables

A new configuration parameter, fetchSize has been added to allow setting the JDBC fetchSize when retrieving records from staging tables.

The path to the parameter in Configuration Manager in Marketing Platform is Affinium | Campaign | partitions | partition1 | Interact | contactAndResponseHistTracking | fetchSize

The 8.2 installation automatically adds this parameter to your configuration.

On Oracle databases especially, adjust the setting to the number of records that the JDBC should retrieve with each network round trip. For large batches of 100K or more, try 10000. Care must be taken not to go too large as that will have an impact on memory usage and the gains will become negligible, if not detrimental.

## Interact contact and response history ETL script enhancements

The following enhancements have been made in Interact 8.2.0:

1. Ability to specify a larger batch size for ETL using the new configuration property maxJDBCFetchBatchSize.

The CH/RH records will be read from the Interact Runtime data source in chunks of the size specified in the maxJDBCFetchChunkSize property, and written to the Campaign data source.

For example, to process 2.5 million contact history records a day, you should set maxJDBCFetchBatchSize to a number greater than 2.5M so that all records for one day will be processed. maxJDBCFetchChunkSize and maxJDBCInsertBatchSize

should be set to smaller values, say 50,000 and 10,000 respectively. Some records from the next day will be processed as well, but retained until the next day.

2. Ability to schedule an ETL run

An option is now available to run the ETL once a day, with the ability to specify a preferred time window for the run. The ETL will start during the specified time interval and will process at most the number of records specified using `maxJDBCFetchBatchSize`.

3. Option to retain process contact and response history records

An option is now available to retain processed contact and response history records.

4. ETL completion notification

You can now specify an absolute path to a script that will be run when ETL completes. Four arguments are passed to the completion notification script: start time, end time, total number of CH records processed, and total number of RH records processed. The start time and end time are numeric values representing number of milliseconds elapsed since 1970.

**Note:** If ETL takes more than 24 hours to execute, and thus misses the start time for the next day, it will skip that day and run at the scheduled time the following day. For example, if ETL is configured to run between 1AM to 3AM, and the process starts at 1AM on Monday and completes at 2AM on Tuesday, the next run, originally scheduled for 1AM on Tuesday, will be skipped, and the next ETL will start at 1AM on Wednesday.

**Note:** ETL scheduling does not account for Daylight Savings Time changes. For example, if ETL scheduled to run between 1AM and 3AM, it could run at 12AM or 2AM when the DST change occurs.

### Start/Effective dates of offers now taken into consideration in Interact

Two new configuration parameters have been added to allow managing start/effective date behavior with offers. Both are located in the following path in Configuration Manager in Marketing Platform:

Affinium > Interact > offerServing

Table 3. Summary of start/effective date changes

Parameter name	Description
effectiveDateBehavior	<p>This parameter is a global configuration that impacts all offers. By default, it is set to 0 (use effective date).</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• -1 -- Ignore effective date (equivalent to behavior prior to this enhancement)</li> <li>• 0 -- Use effective date (default)</li> <li>• &gt;0 -- Grace period (number of days added to current date. If the effective date is greater than the calculated date (current date plus grace period), the offer will be filtered out)</li> </ul>

Table 3. Summary of start/effective date changes (continued)

Parameter name	Description
effectiveDateGracePeriodOfferAttr	<p>This parameter allows each offer created from a template to have a different grace period value. It maps to a custom offer attribute for setting the number of days before the effective date that an offer can be served.</p> <p>The value is the name of the custom attribute created in the offer template, and the default is blank or no value.</p> <p>If effectiveDateGracePeriodOfferAttr is set, Interact looks for the named attribute in each offer. If an offer contains the named attribute, Interact reads the value and determines the grace period.</p> <p>If an offer does not contain the named attribute or if effectiveDateGracePeriodOfferAttr is not set, Interact uses the effectiveDateBehavior setting.</p> <p>To configure effectiveDateGracePeriodOfferAttr,</p> <ol style="list-style-type: none"> <li>1. Create a custom offer attribute in Campaign.</li> <li>2. Set the value of effectiveDateGracePeriodOfferAttr to the name of the new custom offer attribute.</li> <li>3. Assign the custom offer attribute to each offer template for which you want to specify a grace period.</li> <li>4. In offers created from the offer template, set this attribute to the number of days to be added to the current date to allow as a grace period.</li> </ol>



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## Chapter 7. About the IBM Interact Reports Package

The Interact Reports Package delivers reporting schemas that you can use to track campaign, offer, and cell performance based on the interactive channel and other Interact-specific metrics.

The reports package contains the following features:

- Schemas and schema templates that are registered with Marketing Platform during installation. They describe the attributes and metrics that represent the product's reporting schema and include:
  - Five base schemas that are the basis of the reporting schema (with no custom attributes)
  - One schema template that you can use to create new schemas
- IBM Cognos® customizable model and reports to be deployed on an IBM Cognos BI Server
- Reference documentation that describes the IBM Cognos model and reports  
Reference documentation for report packages is no longer available on the documentation server where the PDF versions of the product documentation are posted. You can access the reference documentation for report packages after you install the reporting schemas on the machine where the Marketing Platform is installed. The reference documentation is in a subdirectory of the Cognos10 directory under the report package installation.

The Interact reports retrieve data from three data sources:

- Interact system tables (design environment)
- Interact learning database
- Interact runtime database

### Reporting schemas

Following are the schemas:

- Interact Views provides the standard attribute views of Interact design environment system tables (campaign, offer, cell, TreatmentRuleInv, and so on).
- Interact Performance is used for measuring performance starting at the campaign or interactive channel level across a combination of other dimensions: offers, cells, segments, interaction points, and over time (hours/last 24-hours or days/last seven days). The metrics are divided into contact and response metrics.
- Deployment History is used by reports that provide information about interactive channel deployments.
- Interact Runtime Views is used by reports that retrieve eligibility statistics, defaulted statistics, and event activity from the runtime system tables.
  - Eligibility statistics are summarized by the following dimensions: interactive channel, interaction point, offers, cells, and time.  
Defaulted statistics are summarized by the following dimensions: interactive channel, interaction point, and segment.  
Event activity is summarized by hour and day.
- Interact Learning View is used by reports that retrieve data from the Interact learning database.

## Template

The package contains a template for the Interact Performance schema so that you can create additional performance reporting schemas for additional audience levels.

## Reports

Following are the reports available from the Campaign Analysis section and Campaign Analysis tab:

- Channel Deployment History
- Interactive Cell Performance Over Time
- Interactive Cell Performance by Offer
- Interactive Offer Performance Over Time
- Interactive Offer Performance by Cell
- Interactive Offer Learning Details
- Interactive Cell Lift Analysis
- Channel Learning Model Performance Over Time
- Zone Performance Report by Offer

Following are the reports available from the Interactive Channel Analysis tab:

- Channel Deployment History
- Channel Event Activity Summary
- Channel Interaction Point Performance Summary
- Interactive Segment Lift Analysis
- Channel Learning Model Performance Over Time
- Zone Performance Report by Offer

Following are the available dashboard reports:

- Interaction Point Performance

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Before you contact IBM technical support, gather the following information:

- A brief description of the nature of your issue.
- Detailed error messages that you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System information."

### System information

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You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM application by viewing the `version.txt` file that is located under the installation directory for each application.

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