Version 10 Release 0
February 28, 2017

IBM Marketing Operations Release Notes

Note

Before using this information and the product it supports, read the information in "Notices" on page 19.

This edition applies to version 10, release 0, modification 0 of IBM Marketing Operations and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. System requirements and compatibility

IBM® Marketing Operations operates as part of the IBM Marketing Software suite of products.

- Marketing Operations version 10.0 requires IBM Marketing Platform 10.0.
- For reporting, Marketing Operations 10.0 uses the 10.0 version of the Marketing Operations and the Marketing Operations/Campaign reports packages.

For installation instructions, see the *IBM Marketing Operations Installation Guide*.

If you have a previous version of Marketing Operations see the *IBM Marketing Operations Upgrade Guide* for upgrade instructions and supported versions for the upgrade process.

Chapter 2. New features and changes in version 10.0

IBM Marketing Operations 10.0 includes the following new features.

For more information about the new features and changes in Marketing Operations 10.0, see the Marketing Operations documentation set.

APIs now available in REST

The IBM Marketing Operations REST API is a façade that provides a client view of a running Marketing Operations instance.

The API supports the following types of operations.
- Component creation and deletion
- Discovery (by component type, attribute value, and more values)
- Component inspection (through its attributes, specialized links, and more values)
- Component modification

The Marketing Operations REST APIs are externally exposed. Therefore, they do not require integration services the way that the Marketing Operations SOAP APIs requires the integration services.

Define suppression rules for real-time personalization directly in Marketing Operations

Use the Campaign and Marketing Operations integration to make offers available for real-time personalization, and define rules to supress offers that are no longer relevant for real-time personalization.

You can define offers **Operations** > **Offers** instead of defining offers in Campaign.

Mark attribute as visible based on other attributes

In an object instance (such as a plan, program, project, and so on), you can make an attribute visible based on what was selected for any combination of all the other single-select and/or single-select database drop-down attributes. You can use this feature to make forms much simpler to fill in, only containing the attributes for which the user needs to provide input based on everything else they have already filled in on the form.

To make attributes visible based on other attributes, you must define rules at the form level.

For example, you can configure a form rule to make the State attribute visible if the user selects `United States` from the Country attribute drop-down list.

Automatically populating start and stop dates when starting a task

Marketing Operations now calculates these dates for your task based on the status if you do not enter a start date, end date, or both.

New native markup scribble functionality

In Marketing Operations native markup, you can now draw a free-from "scribble," straight line, or arrow on the page. You can also add squares and ellipses with fill or no fill. You can select a color for all of these options with the **scribble** tool.

Project requestor can no longer change the request once any approval is done

You cannot change the request after the first reviewer approves the project request. If you need to change a request after the first reviewer approves the project, you should change the project status to draft and resubmit the project after you make your changes.

Add a custom milestone type to set a target and forecast dates

You can add a custom milestone type to set a target and forecast dates for all tasks in a workflow in a project template. To do this, create a milestone with code `START`. Then, create a project template. In the workflow of this template, assign one task with this milestone type. When you create and save a project with a target start date that uses this template, the task with the new milestone type copies the project start date as its own target start date as well as its forecast start date. These target and forecast dates are then rippled to all dependent tasks in the project.

Context-sensitive help for Configuration properties

When you view configuration properties under **Settings** > **Configuration**, you can choose **Help** > **Help for this page** to display context-sensitive help. For example, if you request help for the **`Campaign | caching`** page, you see a help topic that specifically describes all of the caching options. You must have an internet connection to use this feature.

EMM files and directories renamed to IMS

Files and folders that included "EMM" have been changed to IMS. For example, the default top-level directory is now `C:\IBM\IMS` and the names of the installers are `IBM_Marketing_Software_Installer_10.0.0.0_linux.bin`, `IBM_Marketing_Software_Installer_10.0.0.0.sh`, and `IBM_Marketing_Software_Installer_10.0.0.0_win.exe`.

New option during installation to create a system table data source connection in the web application server

You can allow the installer to create the connection to the Interact system tables in the web application server. To enable automatic data source creation during installation, on the Datasource Creation panel, select the **Create Interact Datasource** check box and supply information about your application server.

- The installer creates the data source using `plands` as the JNDI name.
- Note that, if you are using WebLogic, you must add the JDBC driver to your web application server classpath manually even if you allow the installer to create the data source. The installer does this automatically for WebSphere.

Chapter 3. Fixed defects

The following defects are fixed in IBM Marketing Operations version 10.0.

Table 1. Defects corrected in Marketing Operations version 10.0

Issue ID	Description
177288	Clicking **Create Project** on cloned projects might not work in a Chrome browser.
208558, 195181, 195179	The scroll bar did not work correctly and drop-down menus did not display properly on the **Budget Finance Module Tab**.
188267	When a user with a plan user role created a program, they were not able to see the security policy.
181942	When viewing offers, the integrated offer created in a sub folder displayed incorrectly when viewed from the root folder. The offer owner overlapped with the offer name.
154980	Templates did not import or export correctly.
209778	When using dependent SSDB and MSDB attributes within a grid, very inefficient SQL was generated when the grid is viewed. The SQL contained an IN clause and enumerates out all the values.
171516	Users could not delete the last rule from the project template rule builder if it was the only rule.
172268	In **Custom** tabs, after changing the value of an attribute which has dependent attributes, the entire tab is refreshed and the focus jumps back up to the top of the tab.

Fixed defects in integrated systems

This table contains fixed defects in IBM Marketing Operations systems that are integrated with Campaign in version 10.0.

Issue ID	Description
194012	In an environment where Marketing Operations and Campaign are integrated, it is only possible to add integrated projects with names up to 64 characters long. However, the IBM Marketing Operations create request API allows project names up to 256 characters for integrated projects. When these projects are edited through the UI, the project names are truncated to 64 characters upon saving
168569	The **Project Template Security** tab displays incorrectly if the Campaign tab is configured after a standard forms configuration.

Chapter 4. Known issues

This table contains known issues in IBM Marketing Operations version 10.0.

Table 2. Known issues in Marketing Operations version 10.0

Issue	Issue ID	Description
Error occurs when performing certain actions on setup integrated with Tivoli Access Manager.	N/A	When integrated with Tivoli Access Manager, under select circumstances, an "Incomplete Reply from server" error might occur when performing certain actions in the application (for example, configuring form attributes).
REST API support is not available for all APIs in V10.	N/A	REST API support is not available for all APIs. To see supported APIs in V10, see IBM Marketing Operations REST APIs.
NOT EXISTS produces duplicate results in DB2® v10.1.	N/A	In systems that use DB2 v10.1, the NOT EXISTS operator produces duplicate results. Results can be incorrect for queries that include a NOT EXISTS clause. As a workaround, you can set the **`DB2_ANTIJOIN`** registry parameter to `NO` and restart the DB2 server. For example, `<DB2-HOME>\BIN>db2set DB2_ANTIJOIN=NO`
Error on Return to Previous Page.	1054	An error results when a user with no security permissions clicks **Return to Previous Page** on the Dashboard.
An error occurs in the fill-down feature of the workflow if user selects localized user or team.	71853	In some non-English locales, on the workflow page, the cell fill-down feature does not save values if the users or teams have special characters in their names. Special characters include: "^," "%," and "&."
When zoom feature of the Calendar object is used, the view does not show the current Quarter and Month values.	91722	On the Calendar object, when a user zooms from the weekly view to a more granular timeline option, the correct span of weeks is not displayed. In Quarterly view, Quarter 1 is displayed on screen instead of the current quarter. In Monthly view, January is displayed for the Monthly view instead of the current month.
Process flow chart layout issue in workflow designer and project workflow.	163452	The process flow chart layout does not render correctly in Internet Explorer 10.
An approval with dependencies enforced can be canceled even if its dependent task is not yet finished.	163730	The user should receive an error and not be able to cancel the approval until the dependent task is finished.
Columns moved to **Selected columns** still display in **Available Columns**.	163736	After you add columns to **Selected columns**, the columns should not appear in **Available Columns**.
Marketing Operations does not inform the user what deactivation does to the project or request.	166376	Marketing Operations should include information or confimration about what deactivation means to a project or request.
Incorrect icon on Marketing Operations mobile.	171038	The same icon displays for Marketing Operations forms, form tasks, and budget line items.

Table 2. Known issues in Marketing Operations version 10.0 (continued)

Issue	Issue ID	Description
Export file name formatted incorrectly.	174130	The export file name is incorrectly formatted for programs and projects. Other tabs do not display.
The workflow process view does not show tasks in correct order.	175909	In a case when 3 tasks depend on 1 task, the dependency arrow is missing from user interface. This issue occurs only on Internet Explorer 10. This problem does not occur in Spreadsheet view.
The delete row and undo mix on workflow is distorting the tasks and its sequence.	175966	In the workflow edit mode, when you undo a bulk task delete operation, it does not work properly. To workaround this issue, click the cancel button on the workflow instead using undo.
Offers can display multiple times in certain cases in integrated Marketing Operations-Campaign systems.	176049	In certain cases, clicking search or remove in the TCS can cause duplicate copies of the offers in the Browse section
Budget version menu closes automatically in Chrome 37.	176713	If users have multiple budget versions and hover over the **Mark this version active** checkbox, the budget version menu collapses when using Chrome 50 or later.
During installation, uppercase database credentials cause errors.	176872, 176873	To work around this issue, enter database details for the host name and domain name in lower case characters.
The single URL feature for opening objects with all tabs in read only mode has a small number of cases in which the objects opened are either editable or displayed without the full set of tabs.	172846, 172847, 172489, 172856	The situations described include the links in the project's hierarchy in an object opened by a single URL, a single URL link within the window opened by a single URL, single URLs pointing to assets or account objects, the analysis tab of a plan or program object clicked as a single URL, or an attachment tab.
Invalid values cause user interface distortion in the advanced search pop-up.	177317	Search result numbers display incorrectly when invalid values are present. The Advanced Search pop-up is distorted.
5000 error occurs when saving more than one form with the same URL attribute to an asset template.	177680	This error does not affect plans.
User Folders incorrectly displays "None".	N/A	User Folders displays a non-existent folder labeled "None." You can ignore this entry.
A saved form is not editable in a Safari browser when users drag the attribute element on the form palate, and immediately after try to click any button.	220089	To avoid this issue, after dragging the attribute element on form palate, if the user clicks somewhere else in form editor palate before they click any button, and then click **Save and Exit**, **Save Changes**, **Preview**, or **Cancel**, users can edit the form.

Table 2. Known issues in Marketing Operations version 10.0 (continued)

Issue	Issue ID	Description
In a Safari browser, when you click **Download Original** in the markup window, the file is saved successfully on disk. However, it opens a blank tab window along with every download. This is a Safari browser issue.	224272	To avoid this issue you can try to hold the **Option** key and click **Download Original** to download without opening new blank tab. You can also right click **Download Original** to open a context pop-up menu. Click **Save Image As...** to save the file to the desired location. It does not open a new tab.
XML tags are displayed in the Active Plans window.	235781	XML tags are displayed in the Active Plans window when a user clicks **Operations** > **Plans** for the first time after installation.

Known issues in integrated Marketing Operations-Campaign systems

This table contains known issues that affect IBM Marketing Operations systems that are integrated with Campaign in version 10.0.

Table 3. Known issues in integrated Marketing Operations-Campaign version 10.0

Issue	Issue ID	Description
Marketing Operations offers cannot be associated with eMessage assets from Marketing Operations.	N/A	After you create an offer inMarketing Operations and publish it to Campaign, the offer can only be looked up and related to the asset ineMessage. You cannot associate offers with eMessage from Marketing Operations.

Chapter 5. Known limitations

This table contains known limitations in IBM Marketing Operations version 10.0.

Table 4. Known limitations in Marketing Operations version 10.0

Issue	Issue ID	Description
Multiple scroll bars for dashboard portlets	3066	If you reduce the size of the browser window, dashboard portlets can display with two scroll bars. Both Marketing Operations and Marketing Platform add the scroll bar control.
Unable to add forms with accented characters.	8027	Users cannot add forms with accented characters in the **form name** or **table name** fields. This issue is now fixed.
5000 error occurs on Oracle when form attribute string is too long.	175488	The Oracle database limits the form attribute string to 30 characters. Exceeding this length causes a 5000 error.
Incorrect asset URLs	177613	Adding forms to asset templates can cause errors on URLs.
Projects and subprojects must be cleared manually	5817	When you request the Project Health (Monthly) report, you can select the **Projects** and **Sub Projects** to include. If you select a value in either of these lists, and then want to make other selections, you must clear all of the projects or subprojects before you make your other selections.
Relevant products related to offers from Campaign are not migrated over to Marketing Operations	62333	Campaign offers have a relevant products feature, Marketing Operations offers does not have this feature. Therefore, relevant products are not migrated from Campaign to Marketing Operations.
Exception when comments exceed the defined limit	DEF062980	A database exception occurs when a user enters a text string into a field that exceeds the limit imposed by the database. For example, on a system that uses a DB2 database, an attempt to save a project description of longer than 1,048,576 results in an error. This limitation is imposed by the database server.
Safari browser downloads data migration files directly to downloads folder	DEF063699	When you perform a data migration import while using Marketing Operations with the Safari browser, you are not prompted for a destination folder. Imported files are downloaded directly to the folder designated for downloads in Safari.
Users cannot add marketing objects in languages other than English	DEF057079	Marketing Operations does not allow multibyte characters in the marketing object type name.
Unable to add forms or templates with non-English characters in the form name, form attribute name, or table name fields	DEF057100	Form and template fields with non-English characters cannot be saved.
The task pane allows users to edit the Summary tab even if the project is canceled or completed	DEF057121	If a project is canceled or completed on the Summary tab while the task pane is open at the right side of the page, you can continue to edit project forms in the task pane, even though it is no longer active.

Table 4. Known limitations in Marketing Operations version 10.0 (continued)

Issue	Issue ID	Description
Primary key violation when a legacy metrics template is mapped to new template	DEF057563	In Marketing Operations version 8.5.0, the external metrics editor was moved into the application. Metrics templates created in version 8.5.0 must specify a type, which corresponds to plans, programs, or projects. Although Marketing Operations keeps legacy metrics templates for use with plan, program, or project templates created before version 8.5.0, these legacy metrics templates cannot be used in new object templates because they do not have this type information. When creating new plan, program, or project templates, users must select a metrics template that has the same type. If users need to use a legacy metrics template in a new object template, they must recreate it using the new internal metrics configuration feature.
Default dates on the grid do not always localize correctly	DEF057605, DEF040170	The date selection control for grids is not localized for non-English locales, so the default value for a grid date attribute is not always populated for some non-English language locales (such as Japanese).
A reviewer who has not yet responded cannot continue an "On Hold" Approval from right task pane	DEF057650	If a reviewer has not responded to an approval in the On Hold state, then the task pane on the right cannot be used to continue that approval. The **Approve**, **Approve w/changes**, and **Deny** buttons display for the approval in the task pane, but the **continue** and **cancel** buttons do not display. In contrast, an approver who has already responded to the approval can continue it from right pane. This scenario occurs because the buttons on the right pane are driven by the role of the user: Approver or Approval owner. If the approver and the owner are the same user, approver actions take precedence.
Formulas for computing metrics must be in English	DEF057660	When adding metrics to metrics templates, the user can specify them as **Planned** or **Rollup**. If the user enters a formula in the **Computed by Formula** field, the formula must be in English. An error results if a user enters a translated string instead of ROLLUP.
Metrics formulas are not validated	DEF057726	If an invalid formula is specified for a metric, an exception error results when Marketing Operations finalizes values entered on the Tracking tab of an object instance that uses the metric. Please see the product documentation for information about valid operators and operands.
Groups do not upgrade in custom forms with database table names that use uppercase	DEF058551	This limitation applies to installations that upgrade from 7.5.x to 8.5 and then to 9.0 (a two-step process). Custom forms that include attributes in custom groups and that include an uppercase character in the form table name do not upgrade correctly. The custom groups are deleted and the attributes are moved to the default group.
Offers are not available in the **Marketing Object Type** dropdown when adding a SSOR/MSOR attribute	DEF059340	Marketing Operations version 8.5 has a default marketing object 'Offers' (`uap_sys_default_offer_comp_type`) for integration with the offer management in Campaign. If a single-select object reference attribute referring to the marketing object type "Offers" is created with the auto-create option, it causes problems since some essential fields (for example: Campaign offer code) are not generated with the auto-created offers. To avoid these subsequent problems, the SSOR and MSOR attributes are not allowed to refer to Offers. Offers are not made available in the 'Marketing Object Type' dropdown while adding a SSOR/MSOR attribute.
Limitations in importing offer templates	DEF059793	Offer templates are not imported in the following cases. • An offer template with the same ID exists. • An offer template with the same ID was published and deleted. • Any form with same name is used in an offer template.

Table 4. Known limitations in Marketing Operations version 10.0 (continued)

Issue	Issue ID	Description
Require reason for denying an approval feature cannot be disabled	N/A	When Marketing Operations is configured to require a reason when users deny an approval, users must select a value for the deny reason. After users begin to use this feature, the system cannot be re-configured to disable this feature.
Marketing Operations single URL configuration does not support the analysis tab for plans and programs	172856	If the analysis tab for a plan and program object is configured as single URLs, after clicking these URLs the user interface does not display the tabs to navigate to other parts of the plan or program objects.
In Marketing Operations-Campaign integrated systems, the single URL feature has limited functionality	177309	For a single URL configured campaign project, the implementation tab is not visible. The single URL feature is not implemented for campaign tabs
Marketing Operations approvals on mobile IOS systems have layout problems	178600	The post-complete response button and file names are difficult to see on IOS devices.
`AcquireLock` API does not throw an exception even if a user has opened the people tab and other tabs in edit mode.	166474	When using the IBM Marketing Operations API, it is not possible to acquire a tab level lock on an object. The API only allows object level locking, whereas the GUI allows tab level locking.
Form creation, publishing, and usage does not work when DB2 owner and user different	19733	This issue occurs only when the user mentioned in the data source is not the one who has created the database tables.

Chapter 6. Before you contact IBM technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM technical support. Use these guidelines to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM administrator for information.

Note: Technical Support does not write or create API scripts. For assistance in implementing our API offerings, contact IBM Professional Services.

Information to gather

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

When you call IBM technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, check for a `version.txt` file that is located under the installation directory for your application.

Contact information for IBM technical support

For ways to contact IBM technical support, see the IBM Product Technical Support website: (http://www.ibm.com/support/entry/portal/open_service_request).

Note: To enter a support request, you must log in with an IBM account. This account must be linked to your IBM customer number. To learn more about associating your account with your IBM customer number, see **Support Resources > Entitled Software Support** on the Support Portal.

Additional contact information

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