

IBM Unica Marketing Operations  
Version 8 Release 5  
December 23, 2011

*Release Notes*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 11.

This edition applies to version 8, release 5, modification 0 of IBM Unica Marketing Operations (product number 5725-D24) and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. Contacting IBM Unica 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® Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

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

### Information you should gather

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

- A brief description of the nature of your issue.
- Detailed error messages 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" below.

### System information

When you call IBM Unica 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 Unica applications.

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 Unica application by viewing the `version.txt` file located under each application's installation directory.

### Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (<http://www.unica.com/about/product-technical-support.htm>).



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## Chapter 2. System requirements and compatibility

IBM Unica Marketing Operations operates as part of the IBM Unica Marketing suite of products.

Marketing Operations version 8.5.0 requires IBM Unica Marketing Platform 8.5.0.

You can upgrade to Marketing Operations 8.5.0 from Affinium Plan 7.5.1 or later. If you are using an earlier version, you must upgrade to Affinium Plan 7.5.1 as an interim step. For instructions, see the *IBM Unica Marketing Operations Installation Guide*.

For reporting, Marketing Operations 8.5.0 uses the 8.5.0 version of the Marketing Operations and the Marketing Operations/Campaign reports packages.

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

For a list of IBM product versions compatible with this product, refer to the *IBM Unica Compatibility Matrix* and any other product compatibility documents posted under Documentation on the IBM Unica Customer Central web site (<https://customers.unica.com>).

For a list of third-party requirements for this product, refer to the Recommended Software Environments and Minimum System Requirements posted for Marketing Operations version 8.5.0 on the IBM Unica Customer Central web site (<https://customers.unica.com>).

### Key third-party software support changes in version 8.5.0

IBM Unica Marketing Operations version 8.5.0 has added support for the following new versions of third-party software.

#### Operating Systems

- AIX 7.1
- RHEL v5 64 bit

#### Browsers

- Internet Explorer 8

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## New features and changes in version 8.5.0

IBM Unica Marketing Operations 8.5.0 contains enhancements to language support, accessibility of the configuration properties, financial approvals, campaign integration, task workflow, and working with metrics.

### IBM Unica product language support

With release 8.5.0, IBM Unica products support the following languages:

- Brazilian Portuguese
- English
- French

- German
- Italian
- Japanese
- Korean
- Simplified Chinese — including compliance with GB18030 requirements
- Spanish

See the *IBM Unica Marketing Platform Administrator's Guide* for information on setting locale preferences.

## Configuration Properties

The IBM Unica Marketing Operations configuration properties are now under **Settings > Configuration > Marketing Operations** in the IBM Unica Marketing Platform instead of the `planconfig.xml` file. See the *IBM Unica Marketing Platform Administrator's Guide* for more details.

## Financial approvals

### Rule-driven budget approval

Marketing administrators can define rules in program and project templates on the Budget Approval Rules tab. If budget line items meet the criteria of the rule, an approval process is triggered. If budget line items do not meet rule criteria, they are automatically approved. Budget line items are not rolled up to parent programs and plans until they are approved.

In addition to custom attributes, the following standard attributes can be used to create rules.

- Expenditure date
- Source account
- Cost category
- Committed amount
- Forecast amount
- Vendor name

### Option to revert rather than request budget approval

After adding new budget line items, users can finalize them, which may trigger an approval process depending on rules defined in the object template. Alternatively, users can revert back to the previous saved version of the budget line items, which will not trigger any approvals.

### Rule-driven invoice approval

Marketing administrators can define rules on the Budget Approval Rules tab of the invoice template based on invoice or line item attributes. If invoice line items meet the criteria of the rule, an approval process is triggered. If the line items do not meet rule criteria, they are automatically approved. Invoice line items can not be marked "payable" or charge to accounts until all line items on the invoice are approved.

In addition to invoice attributes, which may be custom to your organization, the following line item attributes can be used to create rules.



- Invoice Amount
- Source account
- Cost category
- Cost per unit
- Quantity
- Cost

### Option to revert rather than request invoice approval

After adding new invoice line items, users can finalize them, which may trigger an approval process depending on rules defined in the invoice template. Alternatively, users can revert back to the previous saved version of the line items, which will not trigger any approvals.

### Line-item level tracking and re-approvals

Each line item that needs approval, or reapproval after changes have been made, appears on the approver's list of "items to approve."

An approval status icon for each line item is also shown on the object's Budget Summary tab. Clicking on the icon opens the approval.

## IBM Unica Campaign-Marketing Operations offer integration

The following list summarizes the offer integration features for IBM Unica Campaign and IBM Unica Marketing Operations.

### New "offer" marketing object type

Offers are available in Marketing Operations 8.5.0 as a system-defined marketing object. Users cannot define offers manually.

### Offer states

Offers have the following states.

- **Draft:** Whenever the new offer instance is created, the state of the offer is *Draft*.
- **Published:** The state *Published* pushes the offer instance to Campaign. The first publish creates the offer in Campaign; subsequent publishing updates the offer instance in Campaign.
- **Redraft:** Once the offer is *Published*, it cannot be edited. To edit a published offer, the user can redraft the offer, which changes it to the *Draft* state. User can then edit the offer and publish changes.
- **Retire:** Only *Published* offers can be *Retired*. Once the offer is *Retired*, it is not available for the future use and cannot be edited or changed to any other state.

### Create new offer instances from offer templates

Offer instances can be created in Marketing Operations from templates published to Campaign. The offer instance also has the attributes Campaign Security Policy and Campaign Offer code.

## Offer approvals

Marketing Operations provides a check box for offer approval. Offers can only be published to Campaign if they are approved.

## Static and dynamic attributes shared with Campaign

Marketing Operations has pre-defined offer standard attributes populated in case offer integration with Campaign is enabled. A new category for custom offer attribute is available in the Shared Attributes, which can be edited from Marketing Operations.

## Offer codes automatically generated

In Marketing Operations, the offer code is generated by the Default code generator. Users cannot modify the offer code generator. In the wizard mode of offer creation, the check box "Auto-generate on save" creates the offer code automatically. If the check box is selected, the offer code is generated from Campaign. If the check box is not selected, validation is made for the valid offer code.

## Ability to use Marketing Operations offer management or stay with current solution

Offer integration is a separate option from campaign integration. When campaign integration is enabled, offer integration may also be enabled.

## Task Workflow

IBM Unica Marketing Operations 8.5.0 contains a task pane to streamline workflow.

### View and edit tabs on the task pane

Clicking on a task in the **My Tasks** page opens the task pane on the right and the task's parent object on the left. The task pane provides shortcuts to many Marketing Operations functionalities.

- Edit the project's tabs
- Add Attachments
- Read and post messages
- Manage team members and reviewers
- Find and replace task owners and reviewers
- Edit the workflow
- Edit budget allocations and line items
- Edit Tracking

### Create objects on the task pane

Users can create sub-projects, project requests or linked objects (Existing projects, requests) as part of working on their task using links on the task pane.

### Create a series of linked objects on the task pane

Using the **Save and Duplicate** feature, users can create a series of similar linked objects.

## Work with tasks in context

The task pane provides context for tasks by showing the next task in the workflow (that the user has permission to see) on the bottom of the task pane. If the user does not have permission to edit it, the task is in view mode. Users can also record effort time and write hand-off comments.

## Move efficiently through tasks and approvals in the queue

The following tools allow you to move through multiple tasks and approvals directly on the task pane.

- Skip the task by clicking **Skip**
- Save the task to work on later by clicking **Save for Later**
- Mark the task complete by clicking **Finish**

## Metrics editor

IBM Unica Marketing Operations 8.5.0 no longer uses the external metrics editor. Users can now create metrics, metrics dimensions, and metrics templates on the template creation page.

If you are upgrading to Marketing Operations 8.5.0, existing metrics templates are marked "legacy" so that existing plans, programs, and projects can continue to use them.

## IBM WebSphere Application Server V7.0 requires fixpack 7.0.0.17 or higher

If you plan to use the IBM WebSphere® Application Server V7.0 to deploy any IBM Unica Marketing products, you must apply Fix Pack 17 (also referred to as Version 7.0.0.17) or higher to address a security issue. This applies to all WebSphere Application Server 7.0 packages, including the version that is bundled with some IBM Unica Marketing products.

You can obtain Fix Pack 17 or higher here:

<http://www-01.ibm.com/support/docview.wss?rs=180&uid=swg27013594>.

Note that on that page, you must select the correct Fix Pack before you download.

For additional information about supported WebSphere versions for deploying IBM Unica Marketing products, see the *Recommended Software Environments and Minimum System Requirements* document for each product.

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## Fixed defects

The following defects have been fixed in IBM Unica Marketing Operations version 8.5.0.

Issue ID	Description
DEF048703, INC47266	Issues while installing Marketing Operations on Sun Solaris Server

Issue ID	Description
DEF050446	If a form with a single-select object reference attribute with the "auto-create" option was exported, then the auto-create option was not retained when importing the form into another Marketing Operations environment. This is fixed. Now a new xml attribute "<autocreate>," exported with the form, retains the auto-create option for the single-select reference attribute when the form is imported into another Marketing Operations environment.
DEF054274, INC54853	Upgrade may fail if an erroneous configuration property was manually removed
DEF057147	Importing a form archive (zip) file into Marketing Operations, caused an error if the zip file being imported contained multiple forms (valid xml files). This occurred because importing multiple forms simultaneously was not supported which resulted in the stack-overflow error.  This is now fixed. Now a zip file containing multiple forms (valid xml files) can be imported simultaneously without any error.

## Known limitations

This table contains known limitations in IBM Unica Marketing Operations version 8.5.0.

Issue	Issue ID	Description
When offer integration is enabled, the Relevant Products field is read-only when an offer is opened in Campaign.	ENH11503	Relevant Products is a default (required) attribute in offer templates in IBM Unica Campaign. When you create or edit an offer in Campaign, you have the option of populating the field, either by importing product IDs or constructing a query. However, with offer integration enabled, the field is not editable when the offer is opened in Campaign, and the field is not visible in Marketing Operations. The workaround is to create a multi-select custom campaign attribute and place it on an offer in Marketing Operations.
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 cancelled or completed	DEF057121	If the task pane is opened in the right panel and the project is cancelled or completed simultaneously in the Summary tab on the left, the project forms can still be edited in the task pane, even though it is no longer active.
Only ASCII names are allowed in Template ID	DEF057394	Template_id is an internal name for the template, which accepts only simple alphanumeric English characters, excluding spaces and special characters. Users cannot enter localized (non ASCII) inputs for the Workflow Template Name, Icon Name, Rule Name, or data mapping file name.

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 made in version 8.5.0 contain strict types, corresponding to plans, programs, or projects. Although Marketing Operations keeps legacy metrics templates for use with plan, program, or project templates created prior to version 8.5.0, these legacy metrics templates cannot be used in new object templates because they lack type information. When creating new plan, program, or project templates, users need to use a metrics templates with the same type. If users need to use a legacy metrics template in a new object template, they must re-create it using Marketing Operations's new internal metrics configuration feature.
Default dates on the grid do not always localize correctly	DEF057605, DEF040170	Grid's date-picker widget is not completely localized for non-English locales, so the default value for a grid date attribute is not always populated for some non-English locales (such as Japanese).
Users can not add Marketing objects in other languages except English	DEF057079	Marketing Operations does not allow multibyte characters in the marketing object type name.
A reviewer who has not yet responded cannot continue an "On Hold" Approval from right task pane	DEF057650	<p>If a reviewer has not responded to an Approval in the "On Hold" state, then he or she cannot continue that approval from Task Right Pane. In this case, the 'Approve', 'Approve w/changes' and 'Deny' buttons are displayed for the Approval on right pane, but 'continue' and 'cancel' buttons doesn't get displayed in this case. By contrast, an approver who has already responded to the approval can continue it from right pane.</p> <p>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 preference.</p>
Formulas for computing metrics need to be written in English	DEF057660	When adding metrics to metrics templates, the user can specify them as <b>Planned</b> or <b>Rollup</b> . If the user enters a formula in the 'Computed by Formula' field, the formula must be in English. If the user enters translated string for "rollup," then Marketing Operations throws an error.
Metrics formulas are not validated	DEF057726	When an invalid formula is specified while creating metrics, Marketing Operations throws an exception while finalizing the values entered in the Tracking tab of an object instance that uses the metric. Please see the product documentation for information about valid operators and operands.
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 Campaign's offer management. If a single-select object reference attribute referring to the marketing object type "Offers" is created using 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	<p>The offer template won't be allowed to import in following cases.</p> <ul style="list-style-type: none"> <li>• If an offer template with same id already exists, then a new offer template will not be allowed to import.</li> <li>• If an offer template was published and deleted, then a new offer template with same id will not be allowed to import.</li> <li>• If any form with same name is used in an offer template then the offer template will not be allowed to import.</li> </ul>

## Known issues

This table contains known issues in IBM Unica Marketing Operations version 8.5.0.

Issue	Issue ID	Description
Subgroup authentication	DEF022909, INC20721	Creating an Admin subgroup in the IBM Unica Marketing Platform does not automatically add the users in the subgroup as Marketing Operations administrators. You must specifically grant the admin access to the subgroup.
Legacy metrics mapped to response history retain deleted values	DEF046008, INC55503	If the response history table is cleared in Campaign, any Marketing Operations metrics that are mapped to the response history table retain the deleted values.
Budget Reports do not display correctly when the granularity is weekly or monthly	DEF054904	This problem occurs to the database design changes done for the Financial Planning module in the Marketing Operations 8.2.0 release.
Integrated Campaign-Marketing Operations Reports do not display correctly when the granularity is weekly or monthly	DEF055000	This problem occurs to the database design changes done for the Financial Planning module in the Marketing Operations 8.2.0 release. To manually (report upgrade cases) make changes to the Campaign Offer Financial Comparison <ol style="list-style-type: none"> <li>1. Open the report in Report Studio.</li> <li>2. Edit the Report Query.</li> <li>3. Edit the Budget Total query item definition to pull from Campaign Project by Offer &gt; Campaign Project &gt; Budget Total</li> <li>4. Change aggregation to be Total/None.</li> <li>5. Edit the Committed Total query item (in Report query) to pull from Campaign Project by Offer &gt; Campaign Project &gt; Committed Total.</li> <li>6. Change aggregation to be Total/None.</li> </ol>
Advanced Search documentation incomplete	DEF058801	The templates dropdown only appears on the <b>Advanced Search</b> screen for marketing objects when there are multiple templates available for that object. There will be more information about using <b>Advanced Search</b> in a future version of the <i>IBM Unica Marketing Operations User's Guide</i> .
Authentication set up for cognos reports documentation incomplete	DEF058526	To set up the authentication mode as 'authenticated per user,' Cognos should have "AAA\lib" directory available at following path: %COGNOS_HOME%\webapps\p2pd\WEB-INF\AAA\lib.

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