

IBM Marketing Operations
Version 9 Release 0
January 15, 2013

Release Notes



Note

Before using this information and the product it supports, read the information in "Notices" on page 31.

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

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Chapter 1. System requirements and compatibility

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

- Marketing Operations version 9.0.0 requires IBM Marketing Platform 9.0.0.
- For reporting, Marketing Operations 9.0.0 uses the 9.0.0 version of the Marketing Operations and the Marketing Operations/Campaign reports packages.

You can upgrade to Marketing Operations 9.0.0 from any 8.x. or 7.5.x version as follows.

Table 1. Supported upgrade paths for Marketing Operations 9.0.0

Source version	Upgrade path
8.x.x	Upgrade to version 9.0.0.
7.5.x	You must upgrade to Marketing Operations 8.5.0 before you can upgrade to Marketing Operations 9.0.0.

For instructions, see the *IBM Marketing Operations Installation Guide*. For information about upgrading to version 8.5.0, see the *IBM Marketing Operations 8.5 Installation Guide*.

Where to find complete system requirement and compatibility information

For a list of IBM EMM product versions compatible with this product and a list of third-party requirements for this product, see the *Recommended Software Environments and Minimum System Requirements* document. This document is posted under Detailed System Requirements on the IBM Support Portal website: (<http://support.ibm.com>).

Note: To access the IBM EMM documentation from the Support Portal, 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.

You can also access this document by selecting **Help > Product documentation** when you are logged in to IBM EMM.

For more information

Different people in your organization use IBM Marketing Operations to accomplish different tasks. Information about Marketing Operations is available in a set of guides, each of which is intended for use by team members with specific objectives and skill sets.

Table 2. Guides in the Marketing Operations documentation set

If you	See	Audience
<ul style="list-style-type: none"> Plan and manage projects Establish workflow tasks, milestones, and personnel Track project expenses Get reviews and approvals for content Produce reports 	<i>IBM Marketing Operations User's Guide</i>	<ul style="list-style-type: none"> Project managers Creative designers Direct mail marketing managers
<ul style="list-style-type: none"> Design templates, forms, attributes, and metrics Customize the user interface Define user access levels and security Implement optional features Configure and tune Marketing Operations 	<i>IBM Marketing Operations Administrator's Guide</i>	<ul style="list-style-type: none"> Project managers IT administrators Implementation consultants
<ul style="list-style-type: none"> Create marketing campaigns Plan offers Implement integration between Marketing Operations and Campaign Implement integration between Marketing Operations and IBM Digital Recommendations 	<i>IBM Marketing Operations and IBM Campaign Integration Guide</i>	<ul style="list-style-type: none"> Project managers Marketing execution specialists Direct marketing managers
<ul style="list-style-type: none"> Learn about new system features Research known issues and workarounds 	<i>IBM Marketing Operations Release Notes</i>	Everyone who uses Marketing Operations
<ul style="list-style-type: none"> Install Marketing Operations Configure Marketing Operations Upgrade to a new version of Marketing Operations 	<i>IBM Marketing Operations Installation Guide</i>	<ul style="list-style-type: none"> Software implementation consultants IT administrators Database administrators
Create custom procedures to integrate Marketing Operations with other applications	<i>IBM Marketing Operations Integration Module</i> and the API JavaDocs available when you click Help > Product Documentation in Marketing Operations, and then download the IBM <version>PublicAPI.zip file	<ul style="list-style-type: none"> IT administrators Database administrators Implementation consultants
Learn about the structure of the Marketing Operations database	<i>IBM Marketing Operations System Schema</i>	Database administrators

Table 2. Guides in the Marketing Operations documentation set (continued)

If you	See	Audience
Need more information while you work	<ul style="list-style-type: none"> • Get help and search or browse the <i>User's, Administrator's, or Installation</i> guides: Click Help > Help for this page • Access all of the Marketing Operations guides: Click Help > Product Documentation • Access guides for all IBM Enterprise Marketing Management (EMM) products: Click Help > All IBM EMM Suite Documentation 	Everyone who uses Marketing Operations

Chapter 2. New features and changes in version 9.0.0

IBM Marketing Operations 9.0.0 contains new features for calculating and monitoring the health of projects, defining and tracking why approvals are denied, and accessing frequently used features quickly. The 9.0.0 release includes changes to the Marketing Operations user interface. The 9.0.0 release also includes updates to the out of office and data migration features introduced by the 8.6 release.

Monitoring overall project health

In addition to the statuses that indicate the lifecycle stage of a project, IBM Marketing Operations now calculates a health status for projects. One of the following health statuses can be calculated for a project:

- Healthy
- Warning
- Critical
- Unknown

To assess the overall health of a project objectively, Marketing Operations compares project data to thresholds for key performance indicators (KPIs). For example, a project with <1% of its tasks overdue and 0% of its milestones overdue is Healthy. However, if more than 5% of its tasks, or 3% of its milestones, are overdue, the project is in a Critical status.

System administrators define the rules for project health status calculations and associate them with specific project templates, and therefore with the projects that use those templates. Administrators also configure the automated calculations to run every day and periodically throughout each day. For projects that they own, users can initiate the health status calculation as needed during the day.

To review the health status of projects, project owners and participants can:

- Subscribe to daily email notifications that list the results of the automated daily calculation.
- Click **Operations > Projects** and view a project list. The new Project Health column shows the status that is calculated during the most recent automated periodic update.
- View detailed information for a project and click its new Health Status tab.
- Add the new Health Status portlet to the dashboard.

To facilitate analysis, project health status reports are available to compare the statuses that are calculated for different projects within a month or trending over time.

For information about implementing project health rules, see the *IBM Marketing Operations Administrator's Guide*. For information about using different methods to monitor project health, see the *IBM Marketing Operations User's Guide*.

Requiring a reason when an approval is denied

As the outcome of an approval, users select one of these options:

- Approved

- Approved with Changes
- Denied

Users can now be required to select a **Deny reason** when they reject items they receive for approval. Organizations define their own reasons in the new Approval Deny Reason defined list. This feature can be enabled separately for stand-alone approvals and for approval tasks. The new Deny Reason Analysis Report gives administrators metrics on the reasons that users select over time, or for a specific project or stand-alone approval.

For information about configuring the approval process, see the *IBM Marketing Operations Administrator's Guide*. For information about working with approvals, see the *IBM Marketing Operations User's Guide*.

Adding Quick Links to the dashboard

A new type of Marketing Operations portlet, Quick Links, is available in the 9.0 release. When added to the dashboard, each Quick Links portlet provides single-click access to such frequently used options as Create New Project and Add Invoice.

For more information about this new portlet, see the *IBM Marketing Operations User's Guide*.


Option for new projects to replace workflow

In addition to project templates, a Marketing Operations installation can maintain a set of independent workflow template components. While a project is still in Not Started status, users can assess whether the workflow supplied by the template is adequate, or if a different workflow provides a better starting point. With the project Workflow tab in edit mode, users can now select the new **Tools > Import and save workflow** option to replace all spreadsheet rows and values with data from a workflow template. After work on a project begins, this option is no longer available.

Enhanced user interface presentation

The 9.0 release includes several enhancements to the way that Marketing Operations presents options and information. In this release, most of the enhancements affect the project Workflow tab, but other updates affect projects, requests, and other object types. For information about how to use the new user interface controls, see the *IBM Marketing Operations User's Guide*.

Toolbar icons and options updated




The toolbar that displays when a project Workflow tab is in spreadsheet view mode or in edit mode now includes a revised layout and new icons. The new design consolidates similar actions. For example, the edit mode toolbar now includes a single **Add Row** icon instead of three different icons. When users click **Add Row** () , a list displays the three row types: Task, Approval, or Stage. The new design also provides an identifying text label below each icon.

Distinguishing stages from tasks

To differentiate stages from tasks on a workflow spreadsheet, the rows for stages now display with a shaded background.

Task status icons updated

New icons are now used to identify the status of each task in a workflow spreadsheet:

- Active 
- Skipped 
- Finished 

New Change Status control for projects and requests

When users select a project or request, the user interface control for making status changes is now a drop-down list. This new **Change Status** control displays on the right side of the page, above the tabs. On the listing page, and for all other object

types, users continue to click the **Status** icon () to make status changes.

New status icons for all object types

To make the status of object type instances more prominent, a new set of color-coded icons display next to the status. For example:

 **In Progress**

Enhanced data migration features

When an administrator selects **Settings > Marketing Operations Settings > Data Migration**, each listed object type is now a hyperlink to another page in the user interface. Administrators can use these links to access information about existing marketing object types, templates, teams, and so on before they export or import the associated metadata.

In addition, the metadata for the project health rules that are defined on a Marketing Operations system can now be exported in an archive file and imported into another system that is running the same version of Marketing Operations.

For information about exporting and importing metadata, see the *IBM Marketing Operations Administrator's Guide*.

Enhanced out of office features

Project and request owners can now track team members or request recipients who are out of the office on the People tab. The selected delegate and start date also display. Administrators can produce the new Out of Office Users and Delegation Summary to track this information for all users who have the out of office parameter set.

For information about projects and the People tab, see the *IBM Marketing Operations User's Guide*. For information about producing administrative reports, see the *IBM Marketing Operations Administrator's Guide*.

Redesigned properties files

In the 9.0 release, three locale-specific properties files replace the individual XML files that previously stored data for different types of data.

Table 3. Data stored by the new properties files

Type of data	Properties file
Standard marketing object types, such as plans, programs, and projects	<MarketingOperations_Home>/messages/com/ibm/umo/ext/UMOConfigurationMessages_<locale>.properties
Custom marketing object types	<MarketingOperations_Home>/messages/com/ibm/umo/ext/UMOMktObjectContextConfigurationMessages_<locale>.properties
System error and warning messages	<MarketingOperations_Home>/messages/com/ibm/umo/ext/UMOMessages_<locale>.properties

The UMOConfigurationMessages_<locale>.properties and UMOMktObjectContextConfigurationMessages_<locale>.properties files contain ui and list parameters for each marketing object type in the system. These parameters define the labels and strings that identify marketing object types in the user interface. To customize these labels and strings for your organization, administrators edit the files for the default locale. For organizations that support multiple locales, administrators edit the file for each supported locale to provide localized translations. These new files replace the <object>sui.xml and <object>list.xml files.

The localized UMOMessages_<locale>.properties files contain the text of system messages. Changes to these files are not recommended. These files replace the <MarketingOperations_Home>/messages/<name>.xml files.

For information about customizing the IBM Marketing Operations user interface, see the *IBM Marketing Operations Administrator's Guide*.

Supporting API operations on folders

The IBM Marketing Operations API now includes support for operations on folders.

- The IPlanAPI interface now provides methods for creating, finding, and listing folders.
- The new FolderHandle class can be used for persistent references to folder objects.

For information about the Marketing Operations API, see the *IBM Marketing Operations Integration Module*.

Chapter 3. New features for IBM Marketing Operations-Campaign systems

For IBM Marketing Operations systems that integrate with IBM Campaign and that enable features for offers, the 9.0 release includes integration with IBM Digital Recommendations, enhancements to the creative URL attribute type, and enhancements to the API.

Integrating with IBM Digital Recommendations

This feature is available for organizations that also use IBM Digital Recommendations, formerly known as IBM Coremetrics® Intelligent Offer.

Administrators can now configure offer templates so that users can select category IDs and names that are supplied from an IBM Digital Recommendations system, rather than entering those values manually. To configure the offer template, administrators populate the new Coremetrics® Clients defined list with Client IDs and names from an implementation of IBM Digital Recommendations. Administrators then supply the URL for the IBM Digital Recommendations instance and one or more valid Client IDs.

For information about integrating IBM Marketing Operations with IBM Digital Recommendations, see the *IBM Marketing Operations and Campaign Integration Guide*.

Enhanced attribute type for Creative URL

A "Creative URL" is a link to a digital asset, such as a product logo, brand image, marketing research document, or document template. When an offer template includes a custom form with the Creative URL offer attribute, users select a digital asset from the Marketing Operations asset libraries to include in each offer. In release 9.0, Marketing Operations now provides a standard Creative URL attribute type. When you create a new Creative URL attribute, this new attribute type provides the user interface controls for users to select an asset, and then to display a hyperlink to that asset.

The new Creative URL attribute type is only available for use with the standard Creative URL attribute.

When published to Campaign, the attribute type for the Creative URL offer attribute changes to Text Field - String.

For information about using the Creative URL attribute type, see the *IBM Marketing Operations and Campaign Integration Guide*.

Supporting API operations on offers

The IBM Marketing Operations API now includes support for operations on offers.

- The IPlanAPI interface now provides methods for creating, discovering, and modifying offers.
- The new OfferStateEnum enumerated data type defines valid offer states.

For information about the Marketing Operations API, see the *IBM Marketing Operations Integration Module*.

Chapter 4. Fixed defects

The following defects are fixed in IBM Marketing Operations version 9.0.0.

Table 4. Defects corrected in Marketing Operations version 9.0.0

Issue ID	Description
INC72647, ENH11460	The maximum length restriction no longer applies to the Project Description field that is available when users create and edit projects, or to the Comments field that is available when users create and edit project requests.
ENH11677	By default, workflow approval alerts now contain links to the project name and code. Stand-alone approvals include "Linked Project: None" in the alert message.
INC50183, INC62678, DEF061415	<p>The duplication of Marketing Operations user groups and subgroups that sometimes occurred after synchronizing users with Marketing Platform is fixed. The user group hierarchy now displays correctly.</p> <p>In addition, selection list controls in the Marketing Operations user interface now show user groups in alphabetical order.</p>
INC55525	Approvals with an attached password-protected PDF file, or a PDF with any security settings, can now be finished. Previously, the status of approvals with secure PDF attachments could not be changed.
INC55906, INC59729	When a workflow task is skipped, the owner of the next task is now alerted that the task can begin. Previously, the next task owner was only alerted when a task was finished.
PMR45166, INC70242	For assets, the maximum length of the Keywords and Usage fields is increased to 1024 characters.
INC66360, DEF059946	When the Auto Create option is selected for a form attribute with the Single Select Object Reference attribute type, the Template ID list now includes templates in folders as well as templates at the root level. Previously, only templates at the root level could be selected.
INC63115, DEF057902	Workflow task URL attachments can now be accessed from either the Workflow tab or the Attachments tab. Previously, the URL on the Attachments tab was incorrect and resulted in a 404 error.
INC55417, DEF055123	When a request is approved, the values that are supplied for all custom attributes are now correctly transferred to the project. Previously, if the project template included the same attribute in more than one form, any value that was entered for the request was overwritten by the default value when the request became a project.
INC69970, DEF060549	The listGridRow() method in the Marketing Operations API now maps specified search criteria to database queries with the advanced search framework. Previously, in-memory filtering was used to search for grid rows, which could result in performance issues.
INC49458, DEF056812	The project Analysis tab now reports every attachment that is sent as an email attachment. Previously, the Analysis tab reported the email history for attachments to the project, but not for attachments to project tasks.
INC62484, DEF057825	When users configure calendar settings and enable color coding, the attributes that can be selected now also identify the form and template, in the format <i><attribute name></i> (<i><form_name></i> , <i><template_ID></i>). Previously, shared attributes that were on more than one form or template were included in this list multiple times, but only the attribute name displayed.
INC37409, DEF041215	When project workflow tasks display in the calendar view, only tasks that are specified to be shown are included. Previously, all tasks were included on the calendar, even for projects that were created from a template that used the API-enabled workflow hiding feature.

Table 4. Defects corrected in Marketing Operations version 9.0.0 (continued)

Issue ID	Description
INC70706, DEF060903	The calculation that determines the Forecast/Actual End date for a workflow task from the entered Forecast/Actual Start date now correctly applies daylight saving time. Previously, when the Forecast/Actual Start date was supplied as the date on which the time change occurred, the Forecast/Actual End date was calculated as one day later than expected.
INC50638, DEF052708	When Marketing Operations is accessed from a Macintosh Safari browser, icons on the right side of the window display without requiring scrolling. Previously, the width of the Marketing Operations pages was not sized to the width of the browser window.
ENH11698	When the status of a project is changed to Completed or Cancelled, a new option, Cancel all task/approvals linked to the project which are not completed/cancelled , displays. When selected, all of the Pending or Not Started tasks, and all of the Active, In Progress, or On Hold approvals for the project, are also Completed or Cancelled.
ENH06030, ENH06031	Task owners can no longer edit workflow tasks in a project that is in Completed or Cancelled status. In addition, task owners cannot reassign tasks in the owner task list for Cancelled projects.
DEF063732, ENH07609	The attachments that are listed on the Attachments tab of each object type are now sorted in descending order by date added.
ENH11438	When all of the dependencies for a task are in Finished or Skipped status, the task is "ready to start". Users can now subscribe to notifications for tasks that are ready to start. Previously, tasks that were ready to start when they were assigned did not generate notifications.
INC58219, DEF056149	Values that are entered for a custom form attribute with the Single-Select attribute type are now sorted in ascending alphabetical order.
INC58216, DEF056991	When two users change the status of a project at the same time, the system now does an edit check and displays an error message to one of the users.
INC51297, ENH09685, DEF060056	The system now renders comments that entered with Adobe markup consistently. Previously, comments that were entered before an approval was completed displayed differently than comments entered after the approval was complete.
INC70718, DEF060824	For Marketing Operations systems that are configured with Tivoli® Access Manager, the calendar view now displays approvals correctly.
INC72179, DEF061057	Assets that are modified after creation by a different user now display both the name of the creator and the name of the modifier correctly.
INC72033, DEF061172	When a request has two recipients, and both are teams, members of both teams are now notified. Previously, only the members of the first team received the request notifications.
DEF062153	In a project template, apostrophes can now be included in rules that are built on the Request tab. Previously, when a rule contained an apostrophe, it did not display properly.
DEF062303, DEF062319	When the API is used to populate the Target End date for a workflow task without also providing the Target Start date, automated date recalculations now complete correctly. In addition, Target End dates are now calculated correctly based only on the Target Start date. Previously, if the API was used to populate the Target Start date and initiate date calculations, the Target End date was calculated incorrectly.
DEF062443	Forms that contain attributes with either the Single-Select or Yes or No attribute type can now be exported and then reimported successfully. Previously, forms with these attributes could not be reimported.
DEF063032	When a form that is in use by an offer template is edited, the error message that displays in French locales is in French. Previously, the error message was in Italian.
DEF063582	In systems that integrate Marketing Operations with Campaign, Marketing Operations now displays an error message when campaigns do not fulfill defined conditions. Previously, the trigger did not prevent campaign creation and failed to display an error message.

Table 4. Defects corrected in Marketing Operations version 9.0.0 (continued)

Issue ID	Description
DEF063615	The project People tab now displays members and roles correctly when it is populated by the API. Previously, excessive rows of "unassigned" members were displayed on the People tab when the members and reviewers were populated with the <code>IPlanAPI.setMembersByRole</code> and <code>IPlanAPI.setReviewersByRole</code> API methods.
5762	On the project People tab, groups are now sorted for all users. Previously, groups were not sorted in the display for users who were restricted by the User Visibility security option.

Chapter 5. Known issues

This table contains known issues in IBM Marketing Operations version 9.0.0.

Table 5. Known issues in Marketing Operations version 9.0.0

Issue	Issue ID	Description
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.
Invoices can be added through QuickLinks	1082	The QuickLinks portal can include an Add Invoice link. This link is presented to, and is usable by, users who do not have permission to access the Financial Management module.
Project health status reports display blank	2500, 9071	When the Project Health (Monthly) or Project Health (Trend) report is requested for a large number of projects (>750), a blank report page can display instead of an error message. A blank page can also display when users cancel the Project Health (Trend) report.
Dialog for selecting project templates for health rules is not localized	9314	The dialog for selecting project templates for health rules displays the default rule in English for a user with the Spanish locale setting.
Project health reports require DB2®	5317	<p>The Project Health (Monthly) and Project Health (Trend) reports result in exception errors when run in an environment that created the Cognos® data source with OLE DB.</p> <p>Workaround: modify the data source and re-create it with SQLserver using the Microsoft Native Client option.</p>
Horizontal scroll bar not provided for deny reason	1011	When an administrator maps deny reasons for approvals to templates, the Deny reason list box does not display the full value.
Errors in history that is shown on approval Analysis tab	1095	The response history for a stand-alone approval that is denied displays incorrectly on the Analysis tab. The status changes are not sequenced correctly, and the Status Changed message displays as "Waiting to Denied" rather than "Denied".
Dropdown lists incomplete for the Out Of Office Users and Delegation Summary	1030	The dropdown list controls for Projects/Requests and Approvals on the Out Of Office Users and Delegation Summary page do not present all of the available values. This issue occurs when multiple projects, requests, or approvals have the same name: only the most recently added item displays in the list.
User cannot add approver after a workflow template is imported	1818	<p>This issue applies to workflow templates that have the Project/Approval Owner can add and/or delete approvers option cleared for any approval, and that are imported into one Marketing Operations system into another.</p> <p>When such a template is imported, the system-defined approver settings are not imported from the source system. Because the Project/Approval Owner can add and/or delete approvers option is cleared, users cannot add or remove approvers for those approvals.</p> <p>To work around this issue, verify that the Project/Approval Owner can add and/or delete approvers option is selected in the workflow templates you import, and add any required users.</p>
Workflow template import into project does not validate values	6381	The system does not validate the values in a workflow template when it is imported into a project template or instance.

Table 5. Known issues in Marketing Operations version 9.0.0 (continued)

Issue	Issue ID	Description
View in XML Format not working for project health reports	5323	An error occurs when users select the View in XML Format option for the Project Health (Monthly) and Project Health (Trend) reports.
Error occurs when templates are moved	1923	An error occurs when a template is repeatedly moved between different folders.
Error occurs when the Calendar is invoked	1209	An error can occur when a user views the list of Active Projects and Requests and then attempts to view the calendar.
Dates on import workflow template dialog are not localized	6182	When a user attempts to import a workflow template into a project or project template, a list of the workflow templates displays. The creation dates that display for the templates are in the format for the system locale, rather than for the user locale.
Blank page displays on dialog if project status is changed twice	1031	When a user changes the status of a project, the system initiates the process. If the same or another user immediately attempts to change the project status again, the dialog is not refreshed correctly and a blank page displays.
Error for installation under the pt_BR locale	9311	If the pt_BR locale is selected during the installation of Marketing Operations, an error occurs.
Lock is not released if approval is closed with icon	6058	When a user is in spreadsheet view mode on the project Workflow tab and opens an approval task, the system locks the approval. If the user clicks the dialog close icon (X) to close the approval, the lock remains in effect. As a workaround, users can click Cancel to close this dialog.
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 reconfigured to disable this feature.
My Health Portlet does not show latest data on refresh	3545, 5503	The Percentage Completed value is not updated in the My Health Portlet when users click Refresh . In addition, an error can occur when users click Refresh for this portlet.
Project name is not displayed in report	5489	The Project Health (Monthly) report displays only the first 48 characters of project names as labels on the X axis. However, project names in multibyte character sets that are longer than 48 characters do not display.
Report title is not localized	6236	The Project Health (Monthly) report (drilldown) includes a title that is not correctly localized. It includes the words "Health Report" in English.
Template names are not localized in filter	9327	The Project Health (Monthly) report includes a drop-down list for Project Templates . The project template names in this list are not localized and display in English.
Non-fatal error during upgrade to 9.0 can be ignored	13681	During an upgrade from IBM Marketing Operations version 8.x to 9.0.0 using either manual or automatic database setup, a non-fatal error can be reported. This error can occur when the config_migration utility imports the new Marketing Operations configuration properties into Marketing Platform. This error has no functional effect and can be ignored.
Presentation of workflow icons	7367, 7572, 9200, 9235	<p>The space that is allocated for the labels of icons on the project Workflow tab is not large enough for the text labels of every supported language. As a workaround for labels that are difficult to read because of this problem, place your cursor over the icon to see a tooltip.</p> <p>In addition, icons display in two rows at the top of the project Workflow tab rather than as a single horizontal toolbar.</p>

Table 5. Known issues in Marketing Operations version 9.0.0 (continued)

Issue	Issue ID	Description
NOT EXISTS produces duplicate results in DB2 v10.1	N/A	<p>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.</p> <p>As a workaround, you can set the DB2_ANTIJOIN registry parameter to NO and restart the DB2 server. For example,</p> <pre><DB2-HOME>\BIN>db2set DB2_ANTIJOIN=NO</pre>
Returning to the Task list results in an error	12741	When you click Operations > Tasks and select a task, the project displays on the left side of the window and task details open in a dialog on the right. When you click Return to the Task List on the dialog, an error results.
Adding a custom marketing object instance to an approval results in an error	13604	When you add an approval and click Add item(s) to approve , you can specify different types of objects. If you select one of the custom marketing objects on your system, an error results when you save the new approval.
Cloning a project that has a custom form on the Summary tab can result in an error	13606	<p>An error occurs when users attempt to clone a project that has all of the following characteristics:</p> <ul style="list-style-type: none"> • The project is created from a project template that includes a custom form on the Summary tab. • The custom form includes an attribute with the Decimal attribute type. • No default value is supplied for the Decimal attribute.
Subgroup authentication	DEF022909, INC20721	Creating an Admin subgroup in IBM Marketing Platform does not automatically add the users in that subgroup as Marketing Operations administrators. You must specifically grant Admin access to the subgroup.
Legacy metrics that are mapped to response history retain deleted values	DEF046008, INC55503	If the response history table is cleared in Campaign, any metrics in Marketing Operations that are mapped to the response history table retain those deleted values.
Wrong database and port information are populated on the installer screen	DEF060953	<p>During the upgrade to version 8.6, the default values that display on the Marketing Platform and Marketing Operations installation screens are not valid. Variables added for the 8.6 release cause this problem.</p> <p>As a workaround, you can use:</p> <pre>-DUNICA_REPLAY_DIR="D:\<MarketingOperations_Home>\qa\plan85\UM085_310ct\installers"</pre> <p>or, edit installer.properties to add:</p> <pre>UNICA_REPLAY_DIR=D:\\<MarketingOperations_Home>\\qa\\plan85\\UM085_310ct\\installers</pre>

Table 5. Known issues in Marketing Operations version 9.0.0 (continued)

Issue	Issue ID	Description
Upgraded server issue	DEF063700	<p>After the upgrade to version 8.6, the Internet Explorer browser can render certain user interface controls incorrectly. These problems include:</p> <ul style="list-style-type: none"> • The icon for Clone this project, Rename folder, or Add offer list does not display • Shared attributes in forms are not accessible • Offer folders cannot be moved <p>To resolve these problems, reset your personal settings in Internet Explorer:</p> <ol style="list-style-type: none"> 1. In Internet Explorer, select Tools > Internet options. 2. Click the Advanced tab. 3. Click Reset. 4. Select Delete personal settings and then click Reset. 5. Restart Internet Explorer.
Out of office delegation does not apply to ready to start tasks	DEF061374	Marketing Operations users can now define out of office settings, including specifying delegates for their activities. When all of the dependencies for a task are in Finished or Skipped status, the task is "ready to start". Tasks that are assigned to a user who is out of the office when they become ready to start are reassigned to the delegate automatically. However, tasks that are ready to start and then manually assigned to a user who is out of the office are not automatically reassigned to the delegate.
Unsupported operand for project advanced search	DEF061734 / DOC00615	On the Projects list page, performing an advanced search on a Single-Select - Database attribute or Multiple-Select - Database attribute can result in an error. The error occurs if the attribute has an ID or Display column with a type of bigint through the lookup table.
Exception while loading My Task portlet	DEF061982 / DOC00616	An error can occur when a user with numerous assigned tasks displays a dashboard that includes the My Tasks portlet and multiple other portlets.
After security import, sequence of roles changes	DEF062118	If security metadata is exported and then imported into the same system, the sequence of the roles changes.
Approval sent to reviewers with same out of office delegates	DEF062180 / DOC00624	If more than one user designates the same individual as the out-of-office delegate for approvals, an unanticipated situation can occur. When all of those users are out of the office and an approval is sent to them, that approval is delegated for the first out-of-office user only. For subsequent out-of-office users, delegation fails and the message "Delegated user is already a reviewer of the approval" displays.
Using different user interface controls for approvals results in different prompting	DEF062770 / DOC00641	When an approval with the "If approval is edited/resubmitted, approval owner selects the reviewers who need to re-approve" rule is denied by a reviewer and resubmitted through workflow, the system prompts for reviewers as expected. However, if the approval is resubmitted through the task pane at the right side of the page, the system resubmits the approval to all reviewers immediately without prompting.
Exception error for rollup metrics in program metrics templates	DEF044430 / DOC00335	<p>If no metric groups are defined, and a metric with Roll-up selected is added directly to a program metrics template, an error occurs. To avoid this error, either:</p> <ul style="list-style-type: none"> • Create a metric group for the affected program template. • In addition to selecting Roll-up for the metric, define a formula for it that includes the ROLLUP aggregator.

Chapter 6. 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 9.0.0.

Table 6. Known issues in integrated Marketing Operations-Campaign version 9.0.0

Issue	Issue ID	Description
System does not display error or warning on category selection if selected client ID has no categories	8437	If edits are made to the Coremetrics URL or Coremetrics Client IDs for the template in an offer template after offer instances exist, no warning displays when users work with one of the offer instances.
Client ID and category ID not required to create offer instances	3391	If an offer template includes a valid Coremetrics URL and client ID for an IBM Digital Recommendations system, users can create offer instances from the template without selecting a client ID or category ID.
IBM Digital Recommendations attributes display in advanced search	5468	In an advanced search, if a user selects an offer template that does not include values for IBM Digital Recommendations settings, those attributes display in the search results.
Unable to publish TCS by user with Chinese locale	8053	An exception error occurs when users who have Chinese set as their locale attempt to publish a target cell spreadsheet.
For installations that enabled offer integration in 8.5, publishing a template with channel and channel type attributes deletes all values for those attributes in Campaign	DEF063702	This issue affects integrated Marketing Operations-Campaign systems that enabled offer integration in version 8.5. After the upgrade to 8.6, publishing a template with channel and channel type attributes deletes all values that exist in Campaign for those attributes from the database attribute table. After such an import occurs, you must manually add the deleted values back: in Campaign use the Attribute Settings link in the Admin Section, or use the Form Editor in Marketing Operations and republish.
Integrated Campaign-Marketing Operations budget costs display quarterly data only	DEF054904, DEF055000	This problem occurs due to the database design changes done for the Financial Planning module in the Marketing Operations 8.2.0 release. To manually (report upgrade cases) change the Campaign Offer Financial Comparison: <ol style="list-style-type: none"> 1. Open the report in Report Studio. 2. Edit the Report Query. 3. Edit the Budget Total query item definition to pull from Campaign Project by Offer > Campaign Project > Budget Total 4. Change aggregation to be Total/None. 5. Edit the Committed Total query item (in Report query) to pull from Campaign Project by Offer > Campaign Project > Committed Total. 6. Change aggregation to be Total/None.

Table 6. Known issues in integrated Marketing Operations-Campaign version 9.0.0 (continued)

Issue	Issue ID	Description
Precision can change for currency attribute after offer import	DEF060846	When you import an offer template that includes a currency attribute, the precision for that attribute is reset based on the currency locale of the server. For example, when an attribute with a precision of other than 2 is imported to a server with a currency locale of en_US, the precision of the attribute is set to 2 in Marketing Operations.
Error while working with published folder if folder permission denied	DEF060881, DEF060882	If a Campaign security policy specifically denies the Edit folder or Move folder permission for a role, an error occurs when a user with that role attempts to edit or move a published folder in Marketing Operations.
Application asks to publish destination folder while moving offer in Redraft state	DEF060940	If an offer folder is created in Marketing Operations but not published, and then a user moves a published offer into that folder, the system prompts to publish the folder. This prompt also displays if an offer that is in Redraft status is moved into an unpublished folder. However, this prompt does not display if an offer that is in Draft status is moved into an unpublished folder. Note: Offers in Redraft status were previously published to Campaign; therefore, they have the same effect on unpublished offer lists as published offers do.
Forms can be edited even after offer instances are created	DEF061105	After you add a form to an offer template and use that template to create offers, a message indicates that the form cannot be edited. However, this limitation applies only to certain parameters on the form: specifically, you can no longer add or delete attributes, or edit the options, name, description, or default values.
Publishing a smart offer list does not publish draft offers	DEF061212 / DOC00592	If a query is used to populate an unpublished smart offer list, and then the status of one of the included offers changes to Draft, when the offer list is published the Draft offer is not also published. Note: Offer lists that use a query search only in Campaign for offers to include. The query does not search in Marketing Operations for offers that are not published. As a result, publishing an offer list does not publish offers.
Exception while trying to publish a folder into different partition	DEF061274	When an offer folder created in a partition by one Marketing Operations user is published to Campaign by another user who does not have privileges to that partition, an error results.
Exception on setting offer saved search as the Marketing Operations home page	DEF061337 / DOC00595	In a saved search for offers, you can navigate to the directory level and then set the resulting page as the home page. However, each time you log in, the home page displays search results in the root directory, rather than in the specific subdirectory selected.
Status of offer templates not included in template import	DEF061371	When you import an offer template in to Marketing Operations, the status of the template is not imported. As a result, templates that are retired in Campaign are available for use in creating offers.
No edit check on expiration date less than effective date	DEF061838	If you create an offer template that includes standard offer attributes and you provide an Effective Date and an Expiration Date, Marketing Operations does not verify that the Effective Date is before the Expiration Date.
Marketing Operations does not display associated product information for offers	DEF062333	When you import offer data and metadata into Marketing Operations, offers do not display the Relevant Products that are associated with them in Campaign.

Table 6. Known issues in integrated Marketing Operations-Campaign version 9.0.0 (continued)

Issue	Issue ID	Description
Unable to publish offer if underlying template and form are changed but not published	DEF062814 / DOC00642	When you change the default value for an offer attribute that is already in use, you must publish both the form that the attribute is on and the offer template that includes the form. Otherwise, when a user creates an offer from the template and attempts to publish that offer, an error occurs.
Offer folder reimport issue	DEF062944	If a network or other issue interrupts the import of offer data and metadata from Campaign to Marketing Operations, you can begin the import process again. However, if the failure occurred during the import of offer folders, the error message "FOLDER_WITH_SAME_NAME_ALREADY_PRESENT" displays.
Deleted folders can continue to display	DEF063069	When the root folder of a set of hierarchical offer folders is deleted, that folder and its contents are removed from the database. However, the folder can continue to display in the user interface due to browser caching, and an error can occur if a user clicks to select that folder.

Chapter 7. Known limitations

This table contains known limitations in IBM Marketing Operations version 9.0.0.

Table 7. Known limitations in Marketing Operations version 9.0.0

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.
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.
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.
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.
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 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.
Primary key violation when a legacy metrics template is mapped to new template	DEF057563	<p>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.</p> <p>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.</p>

Table 7. Known limitations in Marketing Operations version 9.0.0 (continued)

Issue	Issue ID	Description
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	<p>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.</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 precedence.</p>
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.
Limitations in importing offer templates	DEF059793	<p>Offer templates are not imported in the following cases.</p> <ul style="list-style-type: none"> • 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.
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.

Chapter 8. IBM Marketing Operations Reports Package

About the IBM Marketing Operations Reports Package

The IBM Marketing Operations Reports Package delivers an IBM Cognos model, a set of IBM Cognos reports, and a set of IBM Cognos report portlets.

Specification documents for the provided reports are installed automatically along with the Reports Package, in the ReportsPackMarketingOperations/cognos<version>/docs/ path.

To access the following cross-object reports after the Marketing Operations Reports Package is installed, click **Analytics > Operational Analytics**:

- Marketing Activity Report
- Overdue Milestone Report
- Program Tasks and Milestones
- Project Health (Monthly)
- Project Health (Trend)
- Project On Time Analysis
- Project Performance Crosstab (Custom)
- Project Performance Summary
- Project Performance Summary (Custom)
- Project Tasks
- Resource Task Load
- Resource Utilization Summary
- System Programs
- System Projects
- System Users
- Task On Time Analysis
- Vendor Spend Summary
- Deny Reason Analysis Report for Workflow Approvals
- Deny Reason Analysis Report for Standalone Approvals

To access single-object reports, click the object name then on the Analysis tab use the **Report Type** list. The single-object reports available from the Analysis tab are:

For plans:

- Budget Summary by Quarter

For programs:

- Invoice Summary List
- Budget Summary by Quarter

For projects:

- All revisions
- Approval Responses
- Invoice Summary List

- Marketing Object Cross-Reference
- Approval and Compliance Listing
- Budget Summary by Quarter
- Detailed Expense Breakout

For teams:

- Revision History
- Work Assigned to Team
- Work Assigned to Team Member

Administrators can review and enable report portlets by clicking **Settings > Dashboard Portlets**. Users create dashboards and add report portlets to them on the Dashboard tab.

- My Approval Summary
- My Task Summary
- Budget by Project Type
- Completed Projects by Quarter
- Forecast by Project Type
- Marketing Financial Position
- Projects Requested and Completed
- Spend by Project Type
- Manager Approval Summary
- Projects by Project Type
- Projects by Status
- Manager Task Summary
- My Tasks
- Approvals Awaiting Action
- My Active Projects
- My Requests
- My Alerts
- Projects Over Budget
- Manage My Tasks
- My Project Health

New features and changes

The monthly and trend reports for Project Health, the Deny Reason Analysis Reports for workflow and stand-alone approvals, and the My Project Health report portlet are new in this release.

Known issues

There are no known issues in this release.

Chapter 9. IBM Marketing Operations-Campaign Reports Package

About the IBM Marketing Operations-Campaign Reports Package

The IBM Marketing Operations-Campaign Reports Package delivers a set of reports that combine information from both Marketing Operations and Campaign. The reports in this package retrieve data from the Campaign system tables. To use these reports, you must enable Marketing Operations-Campaign integration and install both the IBM Campaign Reports Package and the IBM Marketing Operations Reports Package.

Specification documents for the provided reports are installed automatically along with this Reports Package, in the `ReportsPackCampaignMarketingOperations/cognos<version>/docs/` path.

The reports package contains the following IBM Cognos reports.

- Campaign Cell Financial Comparison
- Campaign Offer Financial Comparison
- Campaign Offer by Channel Financial Comparison

You can run these reports as cross-object reports by clicking **Analytics > Operational Analytics**, or as single-object project reports by clicking a project name, then on the Analysis tab use the **Report Type** list.

New features and changes

There are no new features or changes to the IBM Cognos reports in this release.

Known issues

Table 8. Known issues in IBM Marketing Operations-Campaign Reports Package

Issue	Issue ID	Description
Campaign Offer Financial Comparison report is displayed blank if campaign is assigned an offer with no attribute	DEF046423	<p>If a campaign project's linked campaign contains a flowchart configured with cells assigned to an offer that has no offer attributes, the report is displayed blank. For this report to display correctly, offers assigned to cells must contain the following attributes:</p> <ul style="list-style-type: none">• Offer fixed cost• Offer fulfillment cost• Response revenue

Chapter 10. Contacting 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 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 administrator for information.

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, 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.

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. If possible, 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.

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