

IBM Marketing Operations
Version 9 Release 1.1
November 26, 2014

Release Notes



Note

Before using this information and the product it supports, read the information in "Notices" on page 23.

This edition applies to version 9, release 1, modification 1 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 9.1.1 requires IBM Marketing Platform 9.1.1.
- For reporting, Marketing Operations 9.1.1 uses the 9.1.1 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 9.1.1

IBM Marketing Operations 9.1.1 includes new features for mobile approvals, workflow template branching, deactivation of projects and requests, and creating custom column order on list pages. This release also introduces IBM Knowledge Center for documentation.

For more information about the new features and changes in Marketing Operations 9.1.1, see the Marketing Operations documentation set.

Support for Chrome browser

Starting in 9.1.1, Marketing Operations is supported on Chrome on Windows Operating Systems.

Mobile approvals

Starting in version 9.1.1, Marketing Operations includes limited features that are optimized for a mobile browser. Marketing Operations now includes support to evaluate approval processes on mobile devices.

Mobile approvals are especially useful for approvals without creative attachments or when you can describe the changes in comments. They are aimed at cases where a text description captures the essence of what needs to be approved, such as "Requesting approval to increase the number of mailings from 10,000 to 15,000."

These approvals might include one or more attachments to approve as well, but only the names of those attachments are visible in the mobile approval. A requester should include descriptive text with each attachment to enable the approver to make a decision, such as, "changed the Corporate logo to the one on file as you requested."

Mobile features are supported only on Android devices 4.4.x and higher, using Chrome 3.6 browser.

Workflow template branching

Many similar projects might require small variations in workflow. You can configure project templates to use different workflows that are based on user input instead of creating separate templates. Use this feature to simplify your organization's template collection.

You can build workflow template branching based on the following types of form and campaign attributes.

- Single-select
- Single-select database
- Yes/No

For example, a project to organize a tradeshow contains an attribute called "Handout" with different options for handouts in the booth. The options are brochure, booklet, demonstration DVD, and 3D piece. The workflow tasks that are

required to create each handout are different, although the rest of the steps for organizing the tradeshow are the same.

Project and request deactivation

After your organization uses IBM Marketing Operations for some time, the user interface can become cluttered with out-dated or unwanted projects and requests. You can deactivate projects and requests to reduce clutter and simplify searches.

Most Marketing Operations users can deactivate and reactivate projects and requests from the object Summary tab or project and request list pages. You can deactivate or reactivate up to 1000 projects and requests with this method depending on the number of objects displayed on each page. Your administrator specifies the maximum number of objects that display on each page in the administrative configuration settings.

After you deactivate projects and requests, they no longer appear in the user interface or search results unless you specifically search for it. The following standard searches show deactivated projects and requests.

- **Deactivated Projects**
- **Deactivated Requests**
- **Deactivated Projects and Requests**

You can also locate deactivated projects and requests in searches built by filtering these default searches.

The inactive projects and requests remain in your database. Inactive projects can always be reactivated.

To deactivate a project or request, it must fulfill the following criteria.

- Projects must be in either **Complete**, **Cancelled** or **On Hold** state.
- Project requests must be in **Canceled** or **Accepted** status.
- If the project has subprojects, the state of the subprojects must also be either **Complete**, **Canceled** or **On Hold**. You must also deactivate the subprojects before you can deactivate the parent project.
- In an integrated Campaign-Marketing Operations environment, the campaign end date must pass before you can deactivate a project or subproject with a linked campaign. You cannot deactivate a project with a future end date.

Bulk project and request deactivation

Administrators can deactivate projects and requests in bulk to quickly remove unnecessary objects from the user interface. This feature allows administrators to perform large system clean-ups faster. The criteria for deactivation are the same.

Administrators set up bulk deactivations based on queries and schedule the deactivation through the IBMMarketing Platform scheduler.

Rearranging columns on object lists

You can rearrange the custom and standard columns of data on marketing object lists so you can see the most relevant data without scrolling. You can choose which

custom columns to display. You cannot remove standard attributes because they are used by the system, but you can put them where they are most useful or least intrusive.

You can rearrange the column order on the lists of the following marketing objects.

- projects
- assets
- offers
- marketing objects

Single URL

URLs for projects and marketing objects are now formed so that you can create a single URL for a marketing object or project in a grid or TCS that, when opened, displays a single browser tab containing read-only versions of all tabs of the object (including the analysis tab and summary tab).

Previously, if you entered the URL from the summary tab of a marketing object or project into a grid, clicking the URL opened only the summary tab. You can now enter a URL in a grid or TCS that opens a marketing object or project to the tab specified by that URL, along with all other tabs also shown.

At this time, the object opens in read-only mode, so you cannot edit the object or link to additional projects or marketing objects from the view. To make changes, return to the main Marketing Operations window to open the project or marketing object.

IBM ExperienceOne Knowledge Center

Starting with version 9.1.1, you can view product documentation in IBM ExperienceOne Knowledge Center, which includes documentation for all of the products in the ExperienceOne family. Use IBM ExperienceOne Knowledge Center to:

- search across all documentation for a particular product.
- search across all of the products in the suite.
- bookmark topics.
- share links to specific topics.
- access IBM support and educational resources.

You can view common tasks, troubleshooting, and support documentation the same way you have in prior releases by using the **Help** menu in each product, including **Help > Product documentation** or **Help > Help for this page**. To get documentation on all other IBM products, use the IBM Knowledge Center at <http://www.ibm.com/support/knowledgecenter/>.

New features for IBM Marketing Operations- Campaign systems

For IBM Marketing Operations systems that integrate with IBM Campaign the 9.1.0 release includes a new feature to automatically copy project attributes to campaign attributes.

Copy project attributes to campaign attributes

In version 9.1.0, creators of projects and project requests in Marketing Operations that are linked to campaigns can push more data through to Campaign automatically. This feature lessens the risk of data entry error and accelerates the process of creating campaign-projects.

You can configure campaign-project templates that automatically copy project information from projects to campaigns. You can automatically copy the description, Start date, and End date so you do not need to enter this information twice. When you create a campaign-project template, select the **Copy project attributes to campaign attributes** check box to automatically copy project attributes to Campaign.

If the **Copy project attributes to campaign attributes** check box in the template is not selected on the template, users can still copy the information with one click in the object instance. When you create instances from templates without the check box selected, the **Copy project attributes to campaign attributes** link copies project attributes to Campaign.

Chapter 3. Fixed defects

The following defects are fixed in IBM Marketing Operations version 9.1.1.

Table 1. Defects corrected in Marketing Operations version 9.1.1

Issue ID	Description
66673	<p>Previously, when Marketing Operations was deployed on the default SSL port, some of the recent links on some administration pages did not work. Recent links for users and non-administration functions did work.</p> <p>This issue is now fixed.</p>
72048	<p>Above 150% zoom, user interface rendering problems sometimes occurred on Internet Explorer version 9 and 10.</p> <p>This issue is now fixed.</p>
91709	<p>The name of the recipient in the Project Request Edit mode did not display the user's time zone. The user's time zones could be seen in Project Request View mode.</p> <p>This issue is now fixed.</p>
156839	<p>In prior versions, it was possible to upload a potentially malicious file. Uploaded files are restricted to the allowed file types listed in the Marketing Operations > umoConfiguration > fileUpload > allowedFileTypes configuration property. Prior releases allowed file types not in the allowedFileTypes list under certain circumstances. This issue has been fixed.</p>
166475	<p>A script error occurred when clicking on the</p> <p>Clone projects option in some cases where Marketing Operations is running with a proxy server. When the script error occurred, the following error message appeared in the web application server log file:</p> <p>LOG: Error: java.lang.IllegalArgumentException, Failed to find parameter: scriptSessionId</p> <p>This issue has been addressed.</p>
158509, 160231	<p>Mapped offers from the TCS grid were being removed intermittently. This issue has been fixed.</p>
162466	<p>Runtime error occurs when updating grid rows using the Marketing Operations budget-related API. This issue has been fixed.</p>
162469	<p>Budget granularity passed to the updateProjectLineItemAllocation API is not being honored. Even if you pass budget granularity value as Monthly/Weekly, Marketing Operations always assumes it as Quarterly.</p> <p>This has been fixed.</p>
169716	<p>If a simple search is performed by typing keywords into the search box on the marketing object page, the "All Marketing Objects" breadcrumb is not visible. This prevents users from navigating back to the full list of marketing objects by clicking the breadcrumb URL. This has been addressed.</p>
159828, 162465	<p>Using the Marketing Operations budget-related API, the budget or line item allocation is not properly updated if the project does not have versions created using the Marketing Operations user interface. This issue has been fixed. (PMR157949)</p>
17095	<p>Once a value has been selected and saved in a user select attribute, it is not possible to clear the field. The system will fill in the last selected value every time the record is saved. This issue has been addressed.</p>

Table 1. Defects corrected in Marketing Operations version 9.1.1 (continued)

Issue ID	Description
170343	When sorting the preconfigured view "All My Teams Un-assigned Approvals" by clicking the Status column heading, an error 5000 occurred. This has been fixed.
160234	Under some circumstances, when multiple users saved the grid at the same time, an error occurred. This issue has been fixed.
121662	When the user creates a form with an attribute that has a URL field type, and then adds the form to a marketing object template, an error 5000 occurs. This issue has been fixed.
162462	In certain circumstances with Marketing Operations environments that run custom API code, it is possible to see hung threads in the web application server when creating a linked project. This issue has been addressed.
147196	Marketing Operations configurations in prior releases supported only SMTP port 25 for email notifications. This issue has been addressed so that the administrator can set the notifyEmailMonitorJavaMailHost configuration property as <smtpHostName>:<smtpPort>. If you omit the port, the default port 25 is used.
147008	Previously, it was not possible to populate the allocations in the Budget tab directly from an API call. This has been addressed.

Fixed defects in integrated systems

This table contains fixed defects in IBM Marketing Operations systems that are integrated with Campaign in version 9.1.0.

Issue ID	Description
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.
8053	An exception error occurs when users who have Chinese set as their locale attempt to publish a target cell spreadsheet.
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.
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.
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.
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.
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.

Chapter 4. Known issues

This table contains known issues in IBM Marketing Operations version 9.1.1.

Table 2. Known issues in Marketing Operations version 9.1.1

Issue	Issue ID	Description
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.
Unable to add forms with accented characters.	8027	Users cannot add forms with accented characters in the form name or table name fields.
SOAP based Markups are not supported on Adobe Professional XI on Windows 7 and 8 using Internet Explorer.	71602	Adobe XI does not support SOAP based APIs for doing markups in Internet Explorer. This problem impacts Windows 7 and 8 OS and IE browsers 9, 10. This feature works on MacOS with Safari browser. To work around this issue, use Adobe X on Windows 7 and 8 OS for SOAP based markups.
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 .
The return to previous page button sometimes does not work as expected in single url windows	166730	The return to previous page button does not work if the user tries to access a page that the user does not have permission to access, or if the page was deleted.

Table 2. Known issues in Marketing Operations version 9.1.1 (continued)

Issue	Issue ID	Description
Marketing Operations does not inform the user what deactivation does to the project or request	166376	
Incorrect icon on Marketing Operations mobile	171038	The same icon displays for Marketing Operations forms, form tasks, and budget line items.
Errors can occur when users change the state from the summary tab	172853	When referenced form is on the summary tab, it becomes editable and other tabs disappear if a user changes the state from summary page.
Export file name formatted incorrectly	174130	The export file name is incorrectly formatted for programs and projects. Other tabs do not display.
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.
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 workaroud 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 37.
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.
Single URL configured Deactivated projects are not indicated as deactivated when displayed as read-only objects from the single URL link.	177024	The action tool bar is hidden for a single project URL, so there are no indicators to suggest the project is deactivated. When you return to edit mode, the indicator is again visible.
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.	177042, 177444, 172846, 172847, 172489, 172856, 177458	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.

Table 2. Known issues in Marketing Operations version 9.1.1 (continued)

Issue	Issue ID	Description
Clicking the Create Project button on cloned projects might not work in the Chrome browser	177288	The user might need to click the Create Project button multiple times to create a new project from a cloned project. This issue does not affect Internet Explorer.
The TCS grid is improperly displayed on integrated Marketing Operations- Campaign systems	177292	This issue only occurs on Internet Explorer 10.
In a Campaign project displayed as a result of clicking a single URL link, the Implementation link is not displayed, and the single URL feature is not implemented for Campaign tabs.	177309	To work around this issue, return to the main Marketing Operations window to open the project.
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.
Incorrect asset URLs	177613	Adding forms to asset templates can cause errors on URLs.
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.
A run-time error occurs when upgrading Marketing Operations but does not affect installation	177891	Upgrading Marketing Operations from 9.1.0.3 to 9.1.1 causes a run-time error. However, the error can be ignored because the upgrade completes successfully.
User Folders incorrectly displays "None"		User Folders displays a non-existent folder labeled "None." You can ignore this entry.

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 9.1.0.

Table 3. Known issues in integrated Marketing Operations-Campaign version 9.1.0

Issue	Issue ID	Description
Marketing Operations offers cannot be associated with eMessage assets from Marketing Operations.	N/A	After you create an offer in Marketing Operations and publish it to Campaign, the offer can only be looked up and related to the asset in eMessage. You cannot associate offers with eMessage from Marketing Operations.
The Interact offer suppression functionality is only available on Campaign offers.	N/A	Marketing Operations offers support only two attributes of Interact : Interaction Point ID and Interaction Point Name. The offer suppression functionality in Interact is only available on offers made in Campaign, not on offers made in Interact.

Chapter 5. Known limitations

This table contains known limitations in IBM Marketing Operations version 9.1.1.

Table 4. Known limitations in Marketing Operations version 9.1.0

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.
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.
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.

Table 4. Known limitations in Marketing Operations version 9.1.0 (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.
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	<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.
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 asset or account objects	172846, 172847, 172489	

Table 4. Known limitations in Marketing Operations version 9.1.0 (continued)

Issue	Issue ID	Description
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.
Single URL configured deactivated projects are not indicated as deactivated	177024	
Linked / Referenced Objects are not handled in case of configured single URLs.	177042	For example, when a project is linked to a program and the program is linked to a plan, the user interface shows a hierarchy with the linkages. These linkages are URLs which go to the proper objects when clicked. In case of the single URL, these links will still be clickable and if clicked opens that object without the displaying the tabs and is editable.
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 supports only one level of single URL configuration	177444	If a marketing object has references to another marketing object that is configured in the single URL window and there is configuration of another Marketing object within those configured single URL's then on clicking these second level URLs displays the object without the 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.

Chapter 6. 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 7. 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 5. 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	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: <ul style="list-style-type: none">• Offer fixed cost• Offer fulfillment cost• Response revenue

Chapter 8. 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.

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