

IBM Contact Optimization
Version 9 Release 1
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Troubleshooting Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 17.

This edition applies to version 9, release 1, modification 0 of IBM Contact Optimization and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Contact Optimization troubleshooting tips

There are common configuration issues that can interfere with running Contact Optimization. There are many more complex situations with a mixture of configuration settings, rule configuration, and data that might cause unexpected results in your Contact Optimization session. The following sections provide details on troubleshooting and fixing these scenarios.

Contact Optimization installation errors

If you encounter any errors while you are installing Contact Optimization, see these possible solutions.

ZeroGlr: Cannot open or remove a file containing a running program

Description of problem

You receive the following error during installation:

IBM Optimize is not successfully installed. Check log files for more details.

In the installation log file, there is the following error:

ERROR - ZeroGlr: <location of library file>/<name of library file> (Cannot open or remove a file containing a running program.)

This error can occur when you are upgrading Contact Optimization on an AIX[®] system, even if the Contact Optimization listener is not running. The Contact Optimization upgrade installation updates specific libraries. Occasionally on AIX systems, even after you stop the Contact Optimization listener, the libraries are not unloaded from memory.

Solution

1. If you have already run the Contact Optimization installation, run the uninstaller.
2. Confirm the Contact Optimization listener is not running.
3. Run the **slibclean** command.
4. Run the Contact Optimization installation.

The **slibclean** command removes unused libraries from memory. This command requires root privileges.

Contact Optimization session run errors

You might have configuration or other errors that prevent a Contact Optimization session from running.

Could not connect to the Contact Optimization server

Description of problem

This error indicates that Campaign cannot connect or communicate with the Contact Optimization server.

Solution

Confirm that the Contact Optimization listener is running.

If it is not running, start the Contact Optimization listener.

If the problem still persists, confirm all configuration properties that define the connection properties are configured properly, including:

- Campaign|unicaACOListener|serverHost
- Campaign|unicaACOListener|serverPort
- Campaign|unicaACOListener|useSSL

Unable to unlock the session with session ID

Description of problem

This error is written to the Contact Optimization session log as Problem unlocking the session. ID: <session ID> CODE 11336: Accessed table not mapped.

This error is caused when the home directory for the database is not correctly specified.

Solution

You must configure the database connection in the ACOServer file appropriate for your operating system and database.

- Oracle: Set ORACLE_HOME and ORACLE_LIB.
- DB2®: Set DB2_INSTANCE_DIR
- MSSQLServer: Configure the DSN setting for the database.

Restart the Contact Optimization listener after you edit the ACOServer file.

Response XML is missing the data xml element

Description of problem

This error is written to the Contact Optimization session log as [E] [TABLE ACC] DATA_SOURCE_CONNECT to UA_SYSTEM_TABLES(<Database Name>) as <UserID>: FAILED.: CODE 11518: Database connection error [sdbsrc:2988].

You receive this error when you attempt to run a Contact Optimization session. This error indicates that the database credentials stored in the <Contact Optimization Installation Directory>/Install/jdbc.properties file are incorrect.

Solution

You can solve this issue in either of two ways.

- Replace <Contact Optimization Installation Directory>/Install/jdbc.properties file with the <Campaign Installation Directory>/Install/jdbc.properties file.
- Update <Contact Optimization Installation Directory>/Install/jdbc.properties with the correct credentials. Use the Marketing Platform **encryptPasswords** tool to encrypt the password.

Errors in Contact Optimization session results

Many issues that you might encounter in Contact Optimization sessions can be resolved by obtaining details from the session logs. Some of these errors might cause a Contact Optimization session to fail. Some of these errors might be the cause of unexpected optimization results.

The LP solver was unable to find an optimal solution to the chunk problem

Description of problem

The outer algorithm (the part that handles the capacity rules) found that the problem given to it for a customer sample is not solvable. This error might mean that one of two conditions:

- There is a logical contradiction in the capacity rules.
- A solution to those rules is not possible with the existing data.

This error can also occur if the scores used for the proposed contacts exceed the numerical precision of the floating point math used. In general, do not exceed a range of 1.0 to 1.0e+11.

Solution

Look for problems with the logic of the capacity rules, and for mismatches with the rules and the proposed contact data. For instance, if a capacity rule requires a minimum of something, make sure that the PCT has at least that many of that item.

Also, check for sample-related provisioning problems. If there seems to be no problem with the rules and data, collect the following files from the log directory of your Contact Optimization installation:

- Contact Optimization session log
- All files that start with ACO_

Send these files to IBM® Technical Support so that they can analyze them.

The generation loop was unable to eliminate all slack and surplus variables

Description of problem

The outer algorithm (the part that handles the capacity rules) progresses by creating alternative solutions to the per customer rules that are generated by the inner (core) algorithm. It creates alternatives by temporarily changing offers scores, and looking for solutions that have not yet been generated. You receive this error if the following two conditions are met:

- The outer algorithm cannot satisfy the capacity rules with any of its alternate solutions.
- The core algorithm is not creating alternative solutions.

This error might mean either of the following conditions:

- The per customer rules and the capacity rules are inherently in conflict, so no solution is possible.
- The data is such that a solution is not possible.

Solution

Look for problems with the logic of the rules, and for mismatches with the rules and the proposed contact data. For instance, You have a per customer

minimum of 1 on all offers, channels, and segments. This rule results in at least as many offers as there are customers in the results. If you also have a capacity rule with a maximum value that was less than the number of customers, this rule causes an inherent logical conflict between the per customer rule and the capacity rule.

Also, check for sample-related provisioning problems. If there seems to be no problem with the rules and data, collect the following files from the log directory of your Contact Optimization installation:

- Contact Optimization session log
- All files that start with ACO_

Send these files to IBM Technical Support so that they can analyze them.

You can use the `ContinueOnGenerationLoopError` configuration property to have Contact Optimization skip the set of customers if this error occurs or stop the Contact Optimization session.

Unprocessable customer

Description of problem

At the end of each session run, there are some log entries that summarize the results. One of the entries is: "Total # of Unprocessable Customers". This error indicates that no solution can be found for the number of customers shown. When this error occurs, it is not an unrecoverable error. The result is that the "unprocessable" customers receive no offers.

You can get a separate file that contains details of unprocessable customers in comma-separated values (CSV) format in the Contact Optimization server log directory by setting the `Optimize|logging|enableBailoutLogging` property to `TRUE`. This file is `unprocessable_10-digit-session-ID.csv` and is in the `partition/partition[n]/logs` directory in the Contact Optimization installation directory. Customers skipped because they cannot be processed are marked with `unprocessable` in the `unprocessable_10-digit-session-ID.csv` file.

Solution

Unprocessable customers can occur for one of the following reasons:

- The rules and data make it impossible to find a solution.
If you set `ContinueOnGenerationLoopError` to `True` and you receive the error `The generation loop was unable to eliminate all slack and surplus variables`, the customers from the set that caused the error are marked as unprocessable.
- The algorithm exceeded the number of alternatives to solve the problem.
The number of alternatives is configured by the `Optimize|AlgorithmTuning|MaxAlternativesPerCustomerEvaluated` property in the session level advanced settings and the configuration properties. Setting the value of this property to a higher number lowers the likelihood that the customer is unprocessable (assuming that it is not inherently unsolvable). However, when it occurs, it also makes the performance penalty higher.

No offers

Description of problem

If a particular customer receives no offers, it is not necessarily an error. Unless a per customer minimum is found in the per customer rules, it is perfectly legal to reject all offers of some customers, if no rules are violated and the overall score is maximized. It can also be a side-effect of an error, as when there is no legal combination of offers given the rules, or when the customer is unprocessable.

Solution

Check the following conditions:

- Whether a per customer minimum exists in the rules
- Ensure that given the rules, all combinations are legal
- Whether there are any unprocessable customers

Invalid size provided to the init count table. (1,0): CODE 5: Internal Error 5

Description of problem

No channel offer attribute values are defined.

Solution

You must define some channel offer attribute values.

Contact Optimization does not satisfy Max limit of Min/Max # Offers Capacity rule

Description of problem

Contact Optimization session does not meet the maximum setting of the Min/Max # Offers Capacity rule.

The minimum and maximum limits of the Min/Max # Offers Capacity rule are not hard limits. The Contact Optimization session generates less than the maximum number of offers if there are not enough proposed contacts. However, occasionally even when there are enough proposed contacts that meet criteria, the maximum is not met.

Solution

There are many reasons why solutions are not found, dependent on your set of rules and data. Some possible reasons include:

- Using fractional scores between -1 and 1. Fractional scores between -1 and 1 might give suboptimal results. Fractional scores greater than 1 and less than -1 are allowed.
- Using a range of scores greater than 100,000. If your range of scores is outside of this limitation, the Contact Optimization might not meet capacity rules.

Contact Optimization session takes a long time to run

Here are troubleshooting steps that you can follow if you believe your Contact Optimization session is taking too long to run.

Before you start

1. Make sure that the session is not running with `Optimize|Debug|ExtraVerbose` enabled, as this setting causes slow run times. Check both the session-level advanced settings and the configuration properties.
2. Make sure that you are using a DB loader, and that it is properly configured.

3. If you are using time intervals with your rules, make sure that the contact history tables for your audience level are indexed.
4. Set `Optimize|Logging|loggingLevels` to `MEDIUM` or `LOW`. Check both the session-level advanced settings and the configuration properties.

Run a session to generate a clean log for troubleshooting

If your Contact Optimization session takes a long time to run after you follow the steps in “Before you start” on page 5, you need to collect detailed information to analyze.

Run a session to generate a clean Contact Optimization server log with the `HIGH` or `ALL` setting on. While your session is running, do not access any Contact Optimization reports, as this action adds data to the log that can confuse things. This session might take a longer time to run because you are collecting detailed log data. Remember to reset `Optimize|Logging|loggingLevels` to `MEDIUM` or `LOW` after you collect the clean log.

When you have the generated log, you check for two things:

- The amount of time spent accessing the database to set up the data that is needed for the session.
- The amount of time spent processing customer samples (chunks).

How to check that the amount of time spent accessing the database

Using the clean log you generated, follow these steps to find out how long Contact Optimization is taking to access the database to set up the data that is needed for the session.

1. In the Contact Optimization server log, search for the string: `LRE Starting chunk: 0`
2. Take the timestamp of this entry, and subtract from it the timestamp of the first entry in the log. The difference is the amount of time spent accessing the database to set up the data that is needed to run the session.

If the value seems too high, look at the start and end timestamps for the queries that comprise the log section preceding `LRE Starting chunk: 0` to identify which one is taking too long.

3. Then, troubleshoot the task that took too long in the same way as you would any other database performance issue.

How to check that the amount of time spent processing customer samples (chunks)

Using the clean log you generated, follow this procedure to find out how long Contact Optimization is taking to process customer samples.

In the Contact Optimization server log, subtract the time stamp from the line matching `LRE Starting chunk: 0` from the time stamp of the line matching `Run Thread terminated`.

This log entry tells you the total time that is spent in the CPU-intensive optimization section. If this action is where the bulk of the time is being spent, you can get a better idea of what is going on by looking at the chunk iterations.

The optimal solution for each chunk is found by iterating through the following steps:

1. Apply a set of scores to the offers in that chunk
2. Find the optimal solutions with those scores for the customers in the chunk by using the core algorithm.
3. Use the result in the outer algorithm to find a new set of scores to try.

Each time Contact Optimization applies a set of scores, it counts as one chunk iteration. The amount of time that is spent in the CPU-intensive section is roughly proportional to the average number of iterations per chunk.

Sample-related Provisioning Problems

To handle large volumes of data while not sacrificing the quality of the results, and at the same time getting the results in an acceptable amount of time, certain requirements are made regarding the makeup of the proposed contacts in a session.

One of the strategies Contact Optimization uses is to break the proposed contact data into random subsets of approximately equal numbers of customers; it then optimizes the proposed contacts of each of these samples independently. If multiple threads are configured and supported by your hardware, these customer samples are processed concurrently.

There is a class of problems that can result in errors or suboptimal results that are a side-effect of the customer sample approach. The number of customer samples that are used for a session run is determined by dividing the number of customers in the PCT by the value of the configuration parameter `OptimizeAlgorithmTuningCustomerSampleSize`. It is important that there are enough proposed contacts matching each capacity rule to allow each random customer sample to be statistically similar relative to every feature used by a capacity rule.

For example, say that we have 1 million customers, and have a configured customer sample size of 1000. This configuration implies that we have 1000 customer samples. Imagine that we have a capacity rule that is set up as: minimum 1 email, maximum 5000 emails. What Contact Optimization does in this example is to take the rule constraints and modify them to spread that rule across the customer samples. In this example, the maximum 5000 emails constraint is divided by the number of samples, so that each sample is processed with a maximum 5 emails constraint. But what do we do with the minimum 1 email constraint? We cannot have each sample requiring a minimum 1/1000 of an email!

Instead, we randomly pick one sample to process with a minimum 1 email constraint, while the other 999 samples are processed with no minimum email constraint. This process all works fine, unless there are not enough proposed contacts using email, to make sure that all 1000 samples get at least one email. If your proposed contacts contains only 500 contacts using email, there is a smaller than 50% chance that a particular sample contains an email. That means you have a greater than 50% chance that the session exits with an error, because the minimum cannot be satisfied, even though 500 times that minimum were present in the proposed contacts. In order to avoid this situation, any feature that is used in a capacity rule should be well-represented relative to the number of samples.

Displaying Contact Optimization listener output to a console

Occasionally when debugging an issue or configuring performance, it might be useful to view the Contact Optimization listener output in a console window.

1. Open the Contact Optimization listener file, `ACOServer.bat` (Windows) or `ACOServer.sh` (UNIX), in the `bin` directory under your Contact Optimization installation directory for editing.
2. To display the Contact Optimization server output to a console, keep the following line:
 - **ACOServer.bat:** `unica_aolsnr` (around line 44)
 - **ACOServer.sh:** `unica_aolsnr` (around line 160)
3. Save and close the file.

To not display the Contact Optimization server output to a console, do the following:

- **Windows:** Configure Contact Optimization listener as a windows service.
- **UNIX:** Use the following line in `ACOServer.sh` (the default):
`unica_aolsnr > /dev/null &`

ACOServer reference

If there are complications during installation, or if you move your database installation, you might need to configure the Contact Optimization listener manually.

The script to start or stop the Contact Optimization listener is the `ACOServer.bat` (Windows) or `ACOServer.sh` (UNIX) file located in the `bin` directory of your Contact Optimization installation.

See “Displaying Contact Optimization listener output to a console” for instructions on editing the Contact Optimization listener to show status in the console.

Table 1. ACOServer script reference

Setting	Description
<code>OPTIMIZE_HOME</code>	Full path to the Contact Optimization installation directory
<code>CAMPAIGN_HOME</code>	Full path to the Campaign installation directory. If Campaign is installed on a separate host, the <code>CAMPAIGN_HOME</code> directory must be mounted (UNIX) or mapped as a network drive (Windows) and the full path must be specified. Configure the directory to have execute permissions.
<code>ORACLE_HOME</code>	If using Oracle database, set to your Oracle home directory
<code>ORACLE_LIB</code>	UNIX only- If using Oracle database, set to your Oracle lib directory. This value is normally <code>\$ORACLE_HOME/lib</code> on 64-bit installations and <code>\$ORACLE_HOME/lib32</code> on 32-bit installations.
<code>DB2_INSTANCE_DIR</code>	UNIX only. If using DB2 database, set to the path to your DB2 instance directory script.

Table 1. ACOServer script reference (continued)

Setting	Description
UNICA_ACSYSENCODING	<p>If you have a Chinese, Japanese, or Korean (CJK) character in your user name, you must set the environment variable UNICA_ACSYSENCODING equal to UTF-8 so that the Contact Optimization session runs without errors.</p> <p>You can set UNICA_ACSYSENCODING in the Contact Optimization listener file. The Contact Optimization listener file, ACOServer.bat (Windows) or ACOServer.sh (UNIX), is in the bin directory of your Contact Optimization installation.</p> <p>ACOServer.bat - To set the variable for users with CJK characters in their user name, remove the comment to the line set UNICA_ACSYSENCODING=UTF-8. To configure the Contact Optimization listener for users without CJK characters in their user name, add a comment to the line set UNICA_ACSYSENCODING=UTF-8.</p> <p>ACOServer.sh - To set the variable for users with CJK characters in their user name, remove the comments to the lines UNICA_ACSYSENCODING=UTF-8 and export UNICA_ACSYSENCODING. To configure the Contact Optimization listener for users without CJK characters in their user name, add comments to the lines set UNICA_ACSYSENCODING=UTF-8 and export UNICA_ACSYSENCODING.</p> <p>You must stop and restart the Contact Optimization listener in a new command prompt for these changes to take effect.</p>

Chapter 2. General performance tips for Contact Optimization

Keep in mind these points when you make data or configuration decisions, if you are concerned about performance.

- In general, larger PCTs take longer to process than smaller ones, in both the IO-intensive data setup and CPU-intensive sections.
- Larger numbers of proposed contacts per customer makes the core algorithm work harder in the CPU-intensive section.
- A larger value of `OptimizeAlgorithmTuningCustomerSampleSize` takes more memory and longer CPU-intensive processing than a smaller value. There is a tradeoff here, since larger values can give more optimal results. Also, smaller values increase the likelihood of encountering sample-related provisioning problems. Check both the session level advanced settings and the configuration properties.
- If you use a time interval in your rules, this interval adds processing time in two ways:
 1. Contact history is queried, and this query can be slow since those tables are often large.
 2. The number of rules is multiplied by the number of time windows required by the interval. This condition makes the CPU-intensive part do more work.

Configure multiple threads

You can decrease run time of the CPU-intensive section by configuring multithreading if the following is true:

- You can see from the log timestamps that much of the session run time is in the CPU-intensive section.
- The Contact Optimization server is running on hardware that supports data-intensive processing in multiple threads.

Additional indexes for additional performance improvements

Beyond indexing the segment membership, contact history, and detailed contact history tables for each audience, and the PCT, POA, and RC tables for each session, there are other tables that you can index to improve the Contact Optimization session run performance.

The Contact Optimization installer indexes these tables properly. However, if you have issues with installation or upgrade, you might need to index these tables manually.

The specific tables and columns you need to index depends on your installation and configuration of IBM Campaign and Contact Optimization, your specific data, and the specific optimization rules you are using. The following table lists tables and columns to index that improved performance in several instances.

Table	Columns	Details
audience_dt1ContactHist	<ul style="list-style-type: none"> • Audience ID • ContactDateTime • TreatmentInstID • ContactStatusID 	Each Audience ID column must match the corresponding Audience ID defined in Campaign.
UA_Treatment	<ul style="list-style-type: none"> • OfferID • TreatmentInstID • HasDetailHistory • PackageID • CellID • OfferHistoryID 	You should also allow reverse scans on these indexes.
UA_OfferAttribute	AttributeID	You should also allow reverse scans on these indexes.
UA_Offer	OfferTemplateID	You should also allow reverse scans on these indexes.
UA_OfferTemplAttr	OfferTemplateID	You should also allow reverse scans on these indexes.

Use cases that can negatively affect performance

This section lists various use cases that can negatively affect the performance of Contact Optimization.

Smart Offer Lists with Rules Using Offer Versions

If you use smart offer lists with rules that use offer versions, there are additional queries that are used in the IO-intensive data setup section. When the number of offers in the lists is large, and the number of attributes per offer is large, the time that is taken to run these queries can be great.

High Maximum for Iterations per Customer Sample

The maximum number of iterations to use for each customer sample is configurable using the `Optimize|AlgorithmTuning|MaxIterationsPerCustomerSample` property. Check both the session level advanced settings and the configuration properties.

Depending on the rules and data, this limit might not be reached by a customer sample. High values guarantee the highest level of optimality of the results, but often the use of a greater number of iterations does not make a large enough improvement in optimality to justify the performance penalty. Typically, five iterations yields an acceptable degree of optimality, and it is unusual to see more than about a dozen or so iterations ever required.

To analyze the customer sample iteration behavior, search in the Contact Optimization log for the string `Iteration:.` This log entry is followed by a number, indicating which iteration it is. Each chunk starts at iteration 1 and counts up. It helps to see what is going on if you get a count of each iteration number in the log, and use the results to construct a histogram.

High Number of Unprocessable Customers

Another major factor in performance is the number of unprocessable customers. If the value of the `Optimize|AlgorithmTuning|MaxAlternativesPerCustomerEvaluated` property is a large number (over 100 or so), the time penalty is high whenever a customer is unprocessable.

When you have many unprocessable customers, look for logical errors in the rules or data. However, it is possible, especially with large numbers of proposed transactions per customer, that the time needed to get some per-customer solutions is high. If so, it might be best to reduce the value of the `MaxAlternativesPerCustomerEvaluated` parameter, accepting more unprocessable customers as a trade-off to improve performance.

In Contact Optimization version 7.5.3 and later, there is more detailed logging to show the minimum, maximum, and average number of alternatives that are evaluated for each customer sample.

Solver Subroutine Calls

If certain combinations of per-customer rules are used, a major performance penalty might be seen in some cases. This situation can occur when there is at least one per-customer `Min/Max # Transactions` rule where the minimum constraint is not zero, combined with one or more package rules.

Note: In versions older than 7.5.3, "Never A with B" counts as a package rule here.

In addition to having these two rules, their scopes must overlap so both are applied to the same proposed transactions. In addition, the scores must be such that the preferred solution for a package rule causes the "Min/Max" rule to fall below its minimum. If all these conditions are met, the core algorithm cannot find the optimal results in an efficient way, and must use a slower call to the solver engine. You know that this condition is occurring if you see this message in the server log: Solver subroutine parameters:

If you are seeing performance issues from using "Never A with B" rules, the best way to improve performance is to upgrade to Contact Optimization version 7.5.3 or later.

Many Cases Where Scores are the Same

If there are many cases where the scores are the same, decision-making in the LRE can sometimes get inefficient. You can tell this scenario is happening if you see this string in the server log: Additional alternative generated:

To avoid this situation, try assigning more varied scores to the proposed transactions.

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.

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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