

IBM Marketing Platform  
Version 9 Release 1  
October 25, 2013

*Release Notes*



**Note**

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

This edition applies to version 8, release 6, modification 0 of IBM Marketing Platform and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About IBM Marketing Platform version 9.1.0

This section describes the new features and changes introduced in the 9.1.0 version of Marketing Platform, and where to find information about changes in support for third-party software in version 9.1.0.

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### System requirements and compatibility

This section provides information on where to find system requirement and compatibility information for this release of IBM® Marketing Platform, and highlights changes in support for third-party software.

#### 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.

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### New features and changes in version 9.1.0

This section describes the new features and changes introduced in the 9.1.0 version of Marketing Platform. For complete details on new features, see the *IBM Marketing Platform 9.1.0 Administrator's Guide*.

#### The IBM EMM Scheduler has been enhanced

The following enhancements are added for the IBM EMM Scheduler.

- Scheduler management pages now display additional information.  
On the Schedule Definitions page, you can find scheduled items and use links to navigate to them.  
A new column on the Schedule Definitions page lists the last two runs and the next run of recurring schedules. (ENH18928, ENH18914)  
Additional details about individual runs have been added on the Scheduled Runs page, and you can also cancel selected runs on this page.
- A new configuration property, **Platform | Scheduler | Enable Scheduler**, allows you to disable the scheduler if your organization does not use it.  
Disabling the scheduler frees additional system resources and can improve performance.

- A new configuration property, **Platform | Scheduler | Maximum Unknown Status Polling Count** allows you to specify the number of times the scheduler checks the status of a scheduled run for which the status cannot be determined. After this limit is reached, the run status is listed as **Unknown** on the **Settings > Scheduled Tasks** page. This can help administrators identify runs that are having problems.

## **Notifications are available for the IBM EMM Scheduler**

Administrators and users who create schedules can now set up notifications, to monitor the status of scheduled runs. Notifications can be sent to the user's email or system in box.

Users with Administrator permissions in Marketing Platform can set up groups of users to whom schedule notifications are sent.

## **Support for clustering has been added**

Marketing Platform, including the IBM EMM Scheduler, now supports clustering.

A new configuration property, **Platform | Is this deployment clustered**, has been added as part of this support. This property must be set to **True** for a clustered environment.

In this release, when Marketing Platform is installed in a clustered environment, eMessage is not supported.

In this release, clustering is supported only when Marketing Platform is deployed on WebSphere. (RTC8834)

## **The configTool utility has a new option for manual upgrades**

A new `-vp` command in the configTool utility has been introduced. It is used mainly in manual upgrades, to import configuration properties. If you applied a fix pack that contains a new configuration property, and you then upgrade, importing a configuration file as part of a manual upgrade process can override values that were set when the fix pack was applied. The `-vp` command ensures that the import does not override previously set configuration values.

When you use `-d` with the `-vp` command, the configTool deletes any child nodes in the path you specify if those nodes are not included in the XML file you specify.

See the *IBM Marketing Platform Administrator's Guide* for complete details on the configTool utility.

## **Sorting performance has improved for alerts, notification, and scheduler pages**

Server side sorting has been implemented for the column sort feature to improve performance on the alerts, notification, and scheduler pages. This is especially noticeable when you use the column sort feature on a large number of records.

## Single sign-on is enabled with IBM SPSS® Modeler Advantage Enterprise Marketing Management Edition

If your organization uses IBM SPSS Modeler Advantage Enterprise Marketing Management Edition, you can enable single sign-on with IBM EMM. Single sign-on allows users to navigate to IBM SPSS Modeler Advantage Marketing Edition from within the IBM EMM user interface without being prompted to log in.

See the *IBM Marketing Platform Administrator's Guide* for instructions on configuring single sign-on.

## IBM EMM installation and upgrade improvements

The improvements to the installation and upgrade process include:

- Installation guides for all products have been rewritten and reorganized into separate installation and upgrade guides, to make information easier to find and use.
- The installers have been enhanced to include better descriptions of the information you need to enter and to clarify what steps to take during each stage of the installation.
- Each installer now provides links directly to the product's installation and upgrade guides, in either PDF or HTML formats.

## Browser behavior in IBM EMM products

IBM EMM products have certain browser restrictions and requirements.

### Supported browsers

For a list of supported browsers, see the *IBM Enterprise Marketing Management Recommended Software Environments and Minimum System Requirements* for version 9.1.0.

### Pop-up blockers

You must disable any pop-up blockers in your browser or browser add-ons, such as toolbars. Pop-up blockers prevent the flowchart window from opening.

### Navigation methods

Do not use the browser controls to navigate. For example, avoid using the browser's Back and Forward buttons. Instead, use the controls supplied in the IBM EMM user interface.

### Using multiple browser windows in Internet Explorer

This restriction applies to using Internet Explorer (IE) with IBM Campaign or any module that uses Campaign flowcharts (eMessage, Contact Optimization, Interact, Distributed Marketing).

To log in multiple times to view side-by-side information, you must open IE and log in to IBM EMM. Then select **File > New Session** in the IE menu bar. In the new IE browser window, log in to IBM EMM as the same or a different user.

**Important:** Do not use any other method to open multiple sessions. For example, do not open a new tab; do not open another browser session from the **Start** menu

or desktop icon; and do not use **File > New Window** in IE. These methods can corrupt information that is shown in the application.

For details, see the *IBM Campaign User's Guide*.

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## New features and changes in version 9.0.0

This section describes the new features and changes introduced in the 9.0.0 version of Marketing Platform.

### The name of the application has changed

Unica Marketing Platform is now known as IBM Marketing Platform. References to "Unica" have been removed from the product.

### Russian translation is now available

The Marketing Platform user interface and documentation is now available in Russian as well as in the previously available languages.

### Alerts and notifications are enhanced

The existing notification feature has been enhanced as follows. The toolbar now displays the number of notifications waiting for a user, and users can now manage their notifications from the toolbar. Distributed Marketing and Marketing Operations currently send notifications.

Alerts are a new feature. Alerts are presented in a pop-up window when users log in. At the time of the 9.0.0 release of Marketing Platform, no products are using the alerts feature, but it is available for adoption by IBM EMM products.

Administrators can also configure Marketing Platform to send email versions of notifications and alerts.

### Dashboards are enhanced

The following enhancements are implemented for dashboards.

- Quick links are a new feature. Quick Links are pre-defined links to IBM EMM products. Some quick links enable users to perform basic actions in the IBM EMM product within the dashboard, without navigating to the product. Administrators can configure portlets that contain a set of quick links that they choose. The same security considerations apply for quick links as for pre-defined portlets.  
As of the 9.0.0 release, only Marketing Operations provides quick links.
- Pre-assembled dashboards are a new feature. Pre-assembled dashboards include portlets appropriate for various audiences. Pre-assembled dashboards are available as soon as Marketing Platform is installed. However, to fully implement these dashboards you must also install any products required to support the portlets they include.
- Dashboards now support Flash-based IBM Digital Analytics reports.



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## Fixed defects

This section describes the fixed defects in the 9.1.0 version of Marketing Platform.

RTC9846	The installer allowed unsupported in-place upgrade. Although direct, in-place upgrade from version 7.5.x to version 9.1.0 is not supported, the installer performed the installation to the same directory where the earlier version was installed without giving any error messages or confirmation prompts. This has been fixed.
RTC10141	Links to recently viewed pages in Campaign sometimes did not work. This occurred most often when Campaign was localized to a multi-byte language. This has been fixed.
RTC8341	Users were unable to log in; the application froze due to deadlocks. This has been fixed.
RTC8236	Memory leaks required that the application be restarted regularly to avoid an out of memory error. This has been fixed.
RTC13594	Duplicate user roles were created during upgrade when the populateDB utility was executed for Marketing Platform. This has been fixed.
RTC6697	When you sorted a column on the Scheduled Runs page, and if the list was long enough to require multiple pages, the sort order was not retained when you navigated to another page in the list. This has been fixed.

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## Known issues

This section describes the known issues in the 9.1.0 version of Marketing Platform.

When you install the report component, the Marketing Platform installer is sometimes unable to create some required directories on the Cognos machine	RTC72226	<p>The account used to run the installer should have permissions to write in the following folders under the Cognos installation.</p> <ul style="list-style-type: none"><li>• configuration</li><li>• webapps\p2pd\WEB-INF\AAA\lib</li><li>• templates\ps</li><li>• webcontent\schemas</li><li>• bin</li></ul> <p>If the installation was run with an account that does not have these permissions, after installation, you can log in to the Cognos machine with an account that does have the required permissions, and then run the copyCognosFiles.bat script, which is located in the tools\cognos10 directory under the Marketing Platform installation.</p>
Schedule fails when non-ASCII characters are used in scheduled objects	RTC72022, DEF063677	If you configure a scheduled run for a Campaign flowchart or other object that was created using non-ASCII characters (such as Chinese), the schedule fails.

In a clustered environment, manual LDAP synchronization fails if the active node goes down	RTC23676	In a clustered installation, if you synchronize LDAP users manually, one of the nodes in the cluster connects with the LDAP server to perform the synchronization. If the node that is performing the synchronization goes down before the synchronization is completed, an error occurs, and you cannot restart the manual synchronization until the process times out. The default value for this timeout is set to 600 minutes in the <b>Platform   Security   Login method details   LDAP synchronization   LDAP sync timeout</b> configuration property. You can set this value to a lower number.
Location of installer logs is incorrectly displayed for AIX	RTC7408	The location of the installer logs stdout and stderr is incorrectly displayed in the installer wizards when the home directory of user is set to /, which is the case for the root user on AIX. It is not a requirement to run the IBM EMM installers as root. If you do run the installers as root on an AIX system, you can find the logs in the // directory.
Marketing Platform upgrade from 8.5 to 9.1 completes with errors in the installation log	RTC103371	<p>The upgrade from Marketing Platform version 8.5 to version 9.1.0 may complete with the following message in the installer log.</p> <p>The DELETE statement conflicted with the REFERENCE constraint "FK_USM_RPM_ROLE". The conflict occurred in database <i>database_name</i>, table "dbo.USM_ROLE_PERMISSION_MAP", column 'ROLE_ID'.</p> <p>If this error occurs after you have run the installers as described in the <i>Marketing Platform 9.1.0 Installation Guide</i>, perform the following step to resolve the issue.</p> <p>Run the following SQL statement against your Marketing Platform system table database.</p> <pre>DELETE FROM USM_ROLE_PERMISSION_MAP WHERE ROLE_ID IN (SELECT ID from USM_ROLE WHERE APPLICATION=(SELECT APP_ID from USM_APPLICATION WHERE APP_ID=106)); DELETE FROM USM_ROLE WHERE APPLICATION = 106;</pre>
Chinese (Taiwan) locale is removed	RTC107066	In previous versions of Marketing Platform, Chinese (Taiwan) was one of the locale options available. This is not a supported locale, and it has been removed from the 9.1.0 version of Marketing Platform. If a user was assigned this locale, an administrator must assign a new locale to that user.
Text in the Detail column on the Scheduled Runs page is not translated	RTC73856	On the Scheduled Runs page, the content in the Details column is not translated.
When you use the browser's <b>Back</b> button to navigate in IBM EMM products, the UI can be distorted	RTC75262	You should use links within the products to navigate in IBM EMM products, rather than the browser's <b>Back</b> button.

When you perform an operation that requires a page refresh on the IBM EMM Scheduler management pages after the session times out, an error occurs	RTC66262	When you perform an operation that requires a page refresh on the Schedule Definitions or the Scheduled Runs page, an error occurs if the session has timed out. Examples of this type of operation include clicking the <b>Refresh</b> button, sorting a column, and clicking a pagination link. If this occurs, log out of IBM EMM and then log in again.
Users can not log out from Campaign or Marketing Platform pages	RTC121489	When Campaign is installed with any other IBM EMM products, you can not log out from Campaign or Marketing Platform pages. The work around is to go to any product page other than Campaign or Marketing Platform pages, and log out from there.

## Known limitations

This section describes the known limitations in the 9.1.0 version of Marketing Platform.

Reports folder permissions are synchronized across partitions	DEF045222	In a multi-partition environment, if you synchronize reports folder permissions in one partition, the folder permissions for other partitions are also added to that partition. The synchronization of folders that do not belong to the current partition does not cause any authorization problems.
Some Campaign configuration properties are incorrect after upgrade	DEF045746	<p>After you upgrade Campaign from version 7.x to 8.1.0, some configuration properties are incorrect.</p> <ul style="list-style-type: none"> <li>"Affinium" appears in some property display names. This naming inconsistency does not affect functionality.</li> <li>Under the Campaign category, the <code>unicaUdiSvr</code> category and its properties appear, although they are not used in Campaign 8.1.0.</li> </ul> <p>You can use the <code>configTool</code> utility to remove "Affinium" from display names or remove the <code>unicaUdiSvr</code> category. Here is an example of how you would do this</p> <ul style="list-style-type: none"> <li>Open a command window in the <code>tools/bin</code> directory under your Marketing Platform installation.</li> <li>Use <code>configTool</code> to export all the Campaign properties to a file. The following example command exports the properties to a file named <code>campaignProperties.xml</code> in the <code>tools/bin</code> directory. <pre>configTool -x -p "Affinium Campaign" -f campaignProperties.xml</pre> </li> <li>Edit the exported file in a text or XML editor.</li> <li>Use <code>configTool</code> to import the revised file, using the overwrite option. For example: <pre>configTool -i -p "Affinium" -f campaignProperties.xml -o</pre> </li> </ul>

Partition memberships are lost during 7.2.x to 7.5.x upgrade	DEF046155, DEF046162	If your version of Affinium Manager is earlier than 7.5.x, you must upgrade to 7.5.1 before you upgrade to Marketing Platform version 8.x. The upgrade scripts for Affinium Manager 7.5.1 do not automatically preserve partition membership. Instead, you must manually restore partition membership before you upgrade to Marketing Platform 8.x. This process is described in the <i>Marketing Platform Installation Guide</i> .
Active Directory users cannot log in to NetInsight or Customer Insight	DEF046778	When Marketing Platform is integrated with Active Directory, a user synchronized from Active Directory or an LDAP server cannot log in to Digital Analytics for On Premises or CustomerInsight.
Uninstalling an IBM EMM application does not remove its menu items	DEF047048	If you uninstall an IBM EMM application, the menu items for that application remain on the Configuration page. You can remove them by going to the Configuration page, locating the appropriate menu settings under the Platform   Platform-wide navigation category, and clicking Delete category.
Deleting an LDAP group mapping does not remove users from the mapped group	DEF047290	When you delete an LDAP group mapping on the Configuration page, users that were imported into the mapped group are not removed from that group. You should remove the users from the group manually.
An error occurs when you cancel a report run	DEF047550	When you cancel a running report and then try to run another report, an error message is displayed. You should select the Analytics menu and run the report again.
Uninformative error message appears when you enter a role name that exceeds length limit	DEF047639	When you enter a role name longer than 120 characters (the length limit), the error that appears reads "Error 500--Internal Server Error." The message should indicate the length limit.
Logout link is redundant with Windows integrated login	DEF047870	When Marketing Platform is integrated with Windows Active Directory and Windows integrated login is enabled, you can not log out using the <b>Log Out</b> link. When you click <b>Log Out</b> , your browser session ends and it appears that you are logged out of IBM EMM, but then you are automatically logged in again. You should close your browser when you log out of IBM EMM.
When you use Edit Preferences to set a Start page, you cannot use an IBM EMM URL	DEF050523	If you set a Start page for a user using the Edit Preferences page for that user, you should not use the initial IBM EMM login URL ( <code>http://host:port/unica</code> ), or you will encounter problems.
Non-ASCII characters not allowed in throttling group names	DEF050689	When you create a throttling group for the scheduler, an error message appears if you use non-ASCII characters. Use only ASCII characters in throttling group names.

<p>Errors occur during upgrade from 7.5.x to 8.x</p>	<p>DEF050735</p>	<p>When you upgrade from Affinium Manager 7.5.x to Marketing Platform 8.x, the data source keys stored in your existing Manager system tables must be un-encrypted and then re-encrypted to be stored in the database for 8.x.</p> <p>If you have changed your keystore password in 7.5.x using (encryptPasswords -k), and if Platform is not installed on AIX®, you can use the following procedure to correct the problem.</p> <p>Note that this workaround does not apply when the Platform is installed on AIX. In that case, you must log in to IBM EMM and change data source passwords manually.</p> <p>This procedure ensures that you have the latest Java™ Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files 5.0.</p> <p>Download these files here: <a href="http://java.sun.com/javase/downloads/index_jdk5.jsp">http://java.sun.com/javase/downloads/index_jdk5.jsp</a></p> <p>Scroll to Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files 5.0 and do the following.</p> <ol style="list-style-type: none"> <li>1. Ensure that the JRE in your Manager 7.5.x installation has the updated JCE Unlimited Strength Jurisdiction files. Follow instructions in the download to copy the local_policy.jar and US_export_policy.jar to the jre/lib/security directory.</li> <li>2. Use encryptPasswords -k to encrypt your keystore password again.</li> <li>3. If you are NOT using the JRE provided in the Platform installer, also update the JCE Unlimited Strength Jurisdiction files for the JRE you intend to use.</li> <li>4. Run the Platform installer and your keys will be migrated to 8.x.</li> </ol> <p>If the JCE updates are not made, or if you were unable to use the workaround because your Platform system table database is AIX, you may see these errors:</p> <p>Cannot retrieve the key from the file [&lt;INSTALL_DIR&gt;\Affinium\Manager\conf\kfile], cause: Illegal key size</p> <p>javax.crypto.BadPaddingException: pad block corrupted</p> <p>If these errors occur, log in to IBM EMM and change data source passwords manually.</p>
<p>User names cannot contain spaces or punctuation characters</p>	<p>DEF051877</p>	<p>If a user's login name contains a space or punctuation character, a JavaScript error appears on every page, although the user can navigate and use IBM EMM normally. Do not include spaces or punctuation characters in login names of user accounts.</p>

Non-ASCII characters are not supported for group, role, and policy names	DEF051431	If you attempt to use non-ASCII characters in group, role, or policy name, you see the following error message: Please use only alphanumeric characters. You should not use non-ASCII characters in these names.
Duplicate role names are not allowed	DEF051895	In Affinium Manager 7.5.x, duplicate role names were allowed. Starting with Marketing Platform 8.0.0, duplicate role names are not allowed. If you upgrade from 7.x to 8.x, and you have multiple roles with the same name, you should rename roles so that no duplicates exist before you upgrade.
Installer message for directory to upgrade Platform 7.5.x is confusing	DEF051952	When you upgrade Marketing Platform 7.5.x to 8.1.0, the installer prompts you to specify the directory where the 7.5.x version is installed. If the installer cannot find the installation registry in that directory, it displays the following message: Manager Upgrade directory specified [directory] was not found by the installer. If you see this message during upgrade, you should verify that the specified directory is the correct one, and then proceed with the upgrade.

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## Issues related to third-party software

This section describes the issues in the 9.1.0 version of Marketing Platform that are related to third-party software.

Generating materialized view SQL fails on some Oracle versions	DEF041909	Using the reporting SQL generator to create a materialized view fails when the Marketing Platform system table database is certain version of Oracle. This is due to Oracle defect 6485782. The issue is fixed in Oracle version 11.1.0.7 (Server Patch Set).
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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](http://www.ibm.com/support/entry/portal/open_service_request)).

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