

Version 11 Release 0
May 31, 2018

*IBM Marketing Operations Release
Notes*

IBM

Note

Before using this information and the product it supports, read the information in "Notices" on page 21.

This edition applies to version 11, release 0, modification 0 of IBM Marketing Operations and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. System requirements and compatibility

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

- Marketing Operations version 11.0 requires IBM Marketing Platform 11.0.
- For reporting, Marketing Operations 11.0 uses the 11.0 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 11.0

IBM Marketing Operations 11.0 includes the following new features.

For more information about the new features and changes in Marketing Operations 11.0, see the Marketing Operations documentation set.

GDPR compliance

GDPR - Right to erasure - GDPR utility provided with IBM Marketing Operation help in generating the SQL scripts which can be executed on IBM Marketing Operation system tables to erase the users data referred in IBM Marketing Operation system. Please refer to IBM Marketing operation GDPR Guide for more details on GDPR utility.

Fast Upgrade

IBM Marketing Software version 11 supports the fast upgrade approach. This approach allows upgrades from version 8.6 onwards to version 11.0. This aids customers by bypassing the multi-step upgrade. The Fast Upgrade approach is also useful in reducing upgrade downtime. The approach is provided for IBM Marketing Platform, IBM Campaign, IBM Contact Optimization, IBM Marketing Operations, IBM Interact for upgrade from 8.6.x version onwards. For details, refer to the Fast Upgrade documentation released with version 11.0.

New Filter(My Due Date) added to show the due date for Project request

To monitor the status of project requests, the deadline can now be shown if you make the following configuration:

1. On the **Operations > Projects** page, click **Options**.
2. In the **Options – Projects** dialog box, click “My due date” in the **Available** columns and add it to the **Selected** columns.

So, when a user navigates to **Operations > Projects** page, on the listing page, the due date of the request is displayed. For users who are Not yet notified, no value is displayed for the due date.

The due date is available in alert customization as <attribute>Scheduled End Date</attribute> for Request object. We can view this by navigating to **Settings > Marketing Operations** settings, in the **Other options > Customize** alerts page when you select the **Planning object** as Request, and in the **Attributes** tab’s listing select Scheduled End Date.

New Filter(My Review Status) added to show the review status of recipient of a Request

You can filter the Requests Lists according to the recipient’s review status, to only show the requests when it is the turn of the user to review – the “Waiting” status and in other cases as well like “Not Yet Notified”, “Accepted” or “Returned”. Earlier the Requests Lists showed all requests wherein the logged in user is a recipient or owner.

Benefit: Users don't need to open requests to see if it is their turn to review. They can identify the request they need to work on at a glance on the Request List.

Example: To filter the Request List using this filter according to the recipient's review status:

1. On the **Operations > Projects** page, click **Search**.
2. In the **Search for Projects** dialog box, click "Select an attribute" and choose "My review status".
3. If the user selects **Waiting** and clicks **Apply**, he can see the request where he needs to take an action.

The user can use the "My review status" in the **List** view to check the status.

Show Project Template Name in Approval Lists

When you create a project, the template selected here will reflect in the **Operations > Approvals** page in the **All approvals > My active approvals**. The template name is thus indicative of the project template the approval belongs to.

Whereas, when you create a standalone approval while creating an **Approval Process**, the **Template name** column will be blank.

Custom portlets allow you to make configurations to show standard or saved searches

Standard searches and customized saved search in Dashboard shows only the content of the list in the Dashboard. All the header as well as other artifacts can be hidden, if desired, when the list is referenced in the custom portlet by appending the `&hideToolbar=true` to the URL of the chosen Saved search.

Refer to the "IBM Marketing Platform Administrator's Guide" > Chapter 5. Dashboard management > Custom portlets > Adding a custom portlet to a dashboard > Before you begin section - for creating the custom portlet with a saved search.

This feature offers the following benefits:

- Better overview of the user's activity on the dashboard.
- Ability to use customized views in the dashboard.

Three options in Out-of-office settings

You are provided three options in Out-of-office settings for Delegating user for workflow tasks and approval tasks, standalone approvals and budget approvals and project requests:

- Do not auto-delegate
- Auto-delegate all
- Auto delegate selected

For details, refer to the IBM Marketing Operations User's Guide > Chapter 1. Introduction > Customize Marketing Operations > Defining Out-of-office settings

Marketing Object Cross Reference Report for offers

Projects that Refer to This Item: projects that contain a link to this marketing object including offers. Marketers can now see the list of Campaign Projects where an

offer or offer list is referenced. The information can be useful when the user wishes to update, cancel or delete an offer or an offer list.

Adobe Acrobat Pro DC support for Marketing Operations 11.0

Marketing Operations is integrated with Adobe Acrobat to mark up PDF attachments. Acrobat Pro DC is now supported with this feature. Acrobat 11 is not supported anymore.

Chapter 3. Fixed defects

The following defects are fixed in IBM Marketing Operations version 11.

Table 1. Defects corrected in Marketing Operations version 11

Issue ID	Description
HMA-283704, PMR - 282131	Form rules not working properly
HMA - 281926, PMR - 235820	"Copy With Markup" functionality not working
HMA - 282617, PMR - 271581	Getting error calling PLAN API call to get attribute
HMA - 282863, PMR - 282604	Adobe Markup pop-up window has grayed out the maximize button
HMA - 282523, PMR - 279444	Approval Steps in template's workflow wiped out after running Upgrade Approval portion of Marketing Operations Upgrade
HMA - 282761, PMR - 280814	Marketing Operations API - 'wake up'
HMA - 282618, PMR - 249034	PO07138 Object attribute field reference form attributes contain more than one value in the UI
HMA - 283587, PMR - 283474	Workflow layout is not retained in IBM Marketing Operations
HMA - 281916, PMR - 271615	Two reminders not able to send emails
HMA - 281950, PMR - 225171	view/add Markup, 9.1.2.2, SOAPError, when Markup note has a '&' or '<' character
HMA - 281914, PMR - 277207	Under certain scenario, clicking on a Budget Line Approval item throws 5006 error
HMA - 281918, PMR - 281908	Unable to approve budget line items assigned to teams
HMA - 281922, PMR - 240312	Persistent cross site scripting issue
HMA - 281930, PMR - 226195	PO06351 Marketing Operation: TCS unable to sort offer under 'SELECT OFFERS'
HMA - 281955, PMR - 224575	In a two column form, a hidden attribute may display in the template with only the attribute title hidden
HMA - 281952, PMR - 229110	Full web server root path is revealed in application responses
HMA - 281924, PMR - 229198	Error while uploading image on summary tab of project
HMA - 281928, PMR - 231133	Dropdown for "Post and send an email to: selected Project Members" sporadically disappears

Chapter 4. Known issues

This table contains known issues in IBM Marketing Operations version 11.0.

Table 2. Known issues in Marketing Operations version 11.0

Issue	Issue ID	Description
Forms : The Single select attribute doesn't display the form as expected with URL attributes included in form rules.	HMA-283675	When URL value is used in a single select attribute value, all attribute values would get displayed.
Delegation doesn't happen if the team member assigns tasks to himself.	HMA-283523	When an OOO user tries to assign the task to himself, delegation fails.
The dependent task numbers are displayed twice in the alerts.	HMA-283450	When task is delegated, alert is triggered and dependent task is displayed twice
Analysis tab does not get updated when delegated user is already approver of standalone approval	HMA-283160	Analysis tab does not get updated when delegated user is already approver of standalone approval
Form Attribute selection is not highlighting the attribute	HMA-283029	When user tries to edit the a grid attribute using IE11, the attribute is not highlighted as per the selection
Too many errors displayed while assigning team task to member	HMA-283013	When a task is assigned to team and user tries to delegate it using the option under project list page, than same error is displayed multiple times.
Copying & Cloning the projects - should delegate for the independent tasks which are in ready to start state.	HMA-282791	Copying & Cloning the projects - should delegate for the independent tasks which are in ready to start state.
Detailed alert is not displayed if task is marked as completed	HMA-282471	When "Detailed workflow change notification" is checked in the Alerts subscription window and user tries to update the status,detailed alert is not displayed.
Approver status does not go into 'Waiting' state if delegation fails	HMA-282129	When a delegation fails for a standalone approval, analysis tab is not getting updated
UMO 9.1.x Example Devkits API application doesn't compile/run clean out of the box without lots of manual intervention/change	HMA-281920	UMO 9.1.x Example Devkits API application doesn't compile/run clean out of the box without lots of manual intervention/change
xml tag is displayed when user clicks on My active invoices or All active invoices for the first time	HMA-247042	When we install a fresh Marketing operations, sometimes the Financial Invoice name is displayed with <xml> tag.
Multiple scroll bars are displayed on the Workflow tab.	Defect 244873	Multiple scroll bars are displayed on the Workflow tab even if the user does not have to scroll to view the entire content in the window.
Marketing Operations settings appears twice in the menu.	Defect 268538	After upgrading the Marketing Operations, 'Marketing Operations Settings' appears twice in the menu.
The Project menus are not seen in the Marketing Operations application user interface.	Defect 270652	The Project menus are not seen in the Marketing Operations application user interface when the user clicks Clone this item and the Clone this project pop-up window opens.

Table 2. Known issues in Marketing Operations version 11.0 (continued)

Issue	Issue ID	Description
Message is displayed multiple times in console mode installation while upgrading from version 10.0.	Defect 271642	Fatal error observed in common installer logs .A "Please wait....." message is displayed multiple times in console mode installation .
After upgrading the Required field in the form rule is reset.	Defect 272141	If you have used the required attributes feature in previous versions and have upgraded to version 10.1, the rules for required features are not retained in version 10.1. To make an attribute required, you must edit the attribute and select the Required option for the attribute. However, this makes the attribute a required attribute on all the forms that it is included in.
Error occurs when performing certain actions on setup integrated with Tivoli Access Manager.	N/A	When integrated with Tivoli Access Manager, under select circumstances, an "Incomplete Reply from server" error might occur when performing certain actions in the application (for example, configuring form attributes).
REST API support is not available for all APIs in V10.	N/A	REST API support is not available for all APIs. To see supported APIs in V10, see IBM Marketing Operations REST APIs.
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.
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 .
Marketing Operations does not inform the user what deactivation does to the project or request.	166376	Marketing Operations should include information or confirmation about what deactivation means to a project or request.
Incorrect icon on Marketing Operations mobile.	171038	The same icon displays for Marketing Operations forms, form tasks, and budget line items.

Table 2. Known issues in Marketing Operations version 11.0 (continued)

Issue	Issue ID	Description
Export file name formatted incorrectly.	174130	The export file name is incorrectly formatted for programs and projects. Other tabs do not display.
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 workaround 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 50 or later.
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.
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.	172846, 172847, 172489, 172856	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.
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.
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.
User Folders incorrectly displays "None".	N/A	User Folders displays a non-existent folder labeled "None." You can ignore this entry.
A saved form is not editable in a Safari browser when users drag the attribute element on the form palate, and immediately after try to click any button.	220089	To avoid this issue, after dragging the attribute element on form palate, if the user clicks somewhere else in form editor palate before they click any button, and then click Save and Exit, Save Changes, Preview, or Cancel , users can edit the form.
In a Safari browser, when you click Download Original in the markup window, the file is saved successfully on disk. However, it opens a blank tab window along with every download. This is a Safari browser issue.	224272	To avoid this issue you can try to hold the Option key and click Download Original to download without opening new blank tab. You can also right click Download Original to open a context pop-up menu. Click Save Image As... to save the file to the desired location. It does not open a new tab.
XML tags are displayed in the Active Plans window.	235781	XML tags are displayed in the Active Plans window when a user clicks Operations > Plans for the first time after installation.
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.

Chapter 5. Known limitations

This table contains known limitations in IBM Marketing Operations version 11.0.

Table 3. Known limitations in Marketing Operations version 11.0

Issue	Issue ID	Description
Default input value is not recognized by installer for supported locale prompt.	HMA-282187	During installation in linux, the user is prompted to enter a value to select locale. User can press enter button to choose default option but it does not work
Acrobat DC support for MO 11	Defect 283290	Attach File and Recorded Sound annotation types is not supported. (Acrobat SDK does not provide any API for that)
While using the Chrome browser users cannot edit the attribute because the Edit attribute link is not displayed.	Defect 246314	While using the Chrome browser, after selecting an attribute from Administrative settings > Template configuration > Form definitions, users cannot edit the attribute because the Edit attribute link is not displayed. This occurs if the zoom level is set to more than 100%.
While using the Chrome browser user interface issues occur for some pop-up windows.	Defect 266552	While using the Chrome browser, the following issues occur for some pop-up windows: The buttons at the bottom of the window are not visible. After pressing F11, the buttons are partially visible and the user must move the window to view the entire button. The search attributes in the Search windows are not displayed correctly
User interface issues occur when a user creates numerous Marketing objects from the Marketing Operations settings > Marketing object type settings menu.	Defect 267053, 267054, 267056	When a user creates numerous Marketing objects from the Marketing Operations settings > Marketing object type settings menu, the following user interface issues occur: <ul style="list-style-type: none"> • The menu objects do not fit in the browser window and the user cannot scroll to see or access all the menu items. • The Save changes and Cancel buttons are not completely visible in the Add Marketing object type window. • The Save changes and Cancel buttons are not completely visible in the Add Template window
The value for a single select attribute is not saved when the grid is saved.	Defect 267800	When a single select attribute is used in a grid, the value is not saved when the grid is saved if the Single select attribute value contains special characters
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.
Unable to add forms with accented characters.	8027	Users cannot add forms with accented characters in the form name or table name fields. This issue is now fixed
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
Incorrect asset URLs	177613	Adding forms to asset templates can cause errors on URLs

Table 3. Known limitations in Marketing Operations version 11.0 (continued)

Issue	Issue ID	Description
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.
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).

Table 3. Known limitations in Marketing Operations version 11.0 (continued)

Issue	Issue ID	Description
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

Table 3. Known limitations in Marketing Operations version 11.0 (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
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 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
Form creation, publishing, and usage does not work when DB2 owner and user different	19733	This issue occurs only when the user mentioned in the data source is not the one who has created the database tables

Chapter 6. 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.

Additional contact information

For recommendations for product improvements, contact IBM at:
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