Version 9 Release 1.2
September 23, 2015

IBM Marketing Operations 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 2 of IBM Marketing Operations and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. System requirements and compatibility

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

- Marketing Operations version 9.1.2 requires IBM Marketing Platform 9.1.2.
- For reporting, Marketing Operations 9.1.2 uses the 9.1.2 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 9.1.2

IBM Marketing Operations 9.1.2 includes the following new features.

For more information about the new features and changes in Marketing Operations 9.1.2, see the Marketing Operations documentation set.

Support added for Adobe Acrobat 11

Adobe Acrobat markup in Marketing Operations now uses Adobe Acrobat 11. To use Adobe Acrobat markup now, you can use **Send comments** in Marketing Operations to send comments and markups added to your PDF. Previously the **Send and receive Comments** button was part of the Comments Acrobat Comments toolbar. This button is now at the top of the browser window.

IBM Knowledge Center

All product documentation is now available in the IBM Knowledge Center at:

http://www.ibm.com/support/knowledgecenter/

You can browse or search within or across product families to find the topics that you need. To search within a single product, expand a product family in the Table of Contents, select a product, then enter your search term. Click the **X** in the toolbar to clear the Search Filter. For more information, click the **Help** icon at the top right of the toolbar.

Chapter 3. Fixed defects

The following defects are fixed in IBM Marketing Operations version 9.1.2.

Table 1. Defects corrected in Marketing Operations version 9.1.2

Issue ID	Description
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. This issue is now fixed.
166730	An approval with dependencies enforced can be canceled even if its dependent task is not yet finished The user should receive an error and not be able to cancel the approval until the dependent task is finished. This issue is now fixed.
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. This issue is now fixed.
177891	Upgrading Marketing Operations from 9.1.0.3 to 9.1.1 causes a runtime error. However, the error can be ignored because the upgrade completes successfully. This issue is now fixed.
194531	Vulnerability fixes were implemented.
181919	When a project is marked as finished, the message board for approval steps on the workflow tab is still available. When the message board is opened, it shows that there are messages, but they are grayed out and users cannot access the comments for the messages. This issue is now fixed.
181921	When **User Security Policy** is selected for the Security Policy Use Model in the **Project Template**, and a user tries to create a project from this template, the user receives the following error. 5005: you don't have enough authorization for this action `5005: you don't have enough authorization for this action` This issue is now fixed.

Fixed defects in integrated systems

This table contains fixed defects in IBM Marketing Operations systems that are integrated with Campaign in version 9.1.2.

Issue ID	Description
194012	In an environment where Marketing Operations and Campaign are integrated, it is only possible to add integrated projects with names up to 64 characters long. However, the IBM Marketing Operations create request API allows project names up to 256 characters for integrated projects. When these projects are edited through the UI, the project names are truncated to 64 characters upon saving

Issue ID	Description
168569	The **Project Template Security** tab displays incorrectly if the Campaign tab is configured after a standard forms configuration.

Chapter 4. Known issues

This table contains known issues in IBM Marketing Operations version 9.1.2.

Table 2. Known issues in Marketing Operations version 9.1.2

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.
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 confimration 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.
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.

Table 2. Known issues in Marketing Operations version 9.1.2 (continued)

Issue	Issue ID	Description
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 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.
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.
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.
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"		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 9.1.2.

Table 3. Known issues in integrated Marketing Operations-Campaign version 9.1.2

Issue	Issue ID	Description
Marketing Operations offers cannot be associated with eMessage assets from Marketing Operations.	N/A	After you create an offer inMarketing Operations and publish it to Campaign, the offer can only be looked up and related to the asset ineMessage. 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 9.1.2.

Table 4. Known limitations in Marketing Operations version 9.1.2

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.
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.
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.

Table 4. Known limitations in Marketing Operations version 9.1.2 (continued)

Issue	Issue ID	Description
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).
A reviewer who has not yet responded cannot continue an "On Hold" Approval from right task pane	DEF057650	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. 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.
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	Offer templates are not imported in the following cases. • 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.

Table 4. Known limitations in Marketing Operations version 9.1.2 (continued)

Issue	Issue ID	Description
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 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. IBM Marketing Operations Reports Package

About the IBM Marketing OperationsReports 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

There are no new features for the reports package 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: • 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.

Additional Contact Information

If you need additional assistance, contact IBM using one of the following methods:

- Customer support: cm_support@us.ibm.com
- Product feedback: cm_feedback@us.ibm.com

Note: Product feedback is recommendations for product improvement; do not use the feedback address to obtain additional assistance.

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