IBM Contact Optimization
Version 9 Release 1
October 25, 2013

Release Notes

IBM

Contents

System requirements and compatibility

This section provides the following information for this release of IBM® Contact Optimization:

- Where to find system requirement and compatibility information
- Changes in support for third-party software

Contact Optimization operates as part of the IBM EMM suite of products.

Contact Optimization version 9.1.0 requires Campaign 9.1.0.

You can upgrade to Contact Optimization 9.1.0 from Contact Optimization version 8.5 or later. For instructions, see the *IBM Contact Optimization Installation Guide*.

Contact Optimization supports 64-bit operating systems only for production installations.

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.

New features and changes in version 9.1.0

The following new features and changes are introduced in version 9.1.0 of IBM Contact Optimization.

Agent Capacity Optimization

With the 9.1 release, Contact Optimization users can now also use Optimization over a branch or Agent channel. You use Agent Capacity Optimization to route high value offers through agents to high value consumers. By routing certain offers for select consumers through your agents, you assure one on one contact with high value consumers and increase the return on your marketing investment. To use Agent Capacity Optimization, while you create a Contact Optimization session, you must declare a campaign channel that is considered as an Agent channel. All offers that are proposed through this channel are routed through agents. You specify one Agent Information table and one Agent Customer Relationship table

for your session. Then, you define a Cross Customer Min/Max # Offers Capacity rule on the Agent channel.

UpdateSessionTableStatistics

The UpdateSessionTableStatistics parameter adds a query for updating statistics of the PCT, RC, and POA tables during an Optimize Session run. You can tune this parameter at the session level without affecting other sessions. Keeping up-to-date index statistics can help improve the performance of the query on these tables. This parameter is also present in the global configuration settings of Optimize.

FICO replacement with iLog

Contact Optimization now uses IBM CPLEX Solver to execute the mathematical calculations necessary to choose the best offer for each campaign target, replacing a non-IBM technology. Using IBM's own technology for optimization gives IBM the opportunity to ensure that roadmaps are well aligned and the product teams collaborate closely in the future, ensuring the Contact Optimization product always achieves top performance.

Enable Max Capacity Consumption

If you get Contact Optimization results that underutilized the Channel capacities, enable `EnableMaxCapacityConsumption` to reduce the loss of Channel Capacity. Then, rerun the Contact Optimization session. If the parameter is set to `EnableMaxCapacityConsumption` true, Contact Optimization uses an enhanced algorithm for trying to meet maximum constraints that are set in Cross Customer rules (Min/Max # Offers Capacity rule and Custom capacity rule). However, if this is used, the session run time might increase depending on the data that is provided to the session.

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.

Change in documentation regarding target cell spreadsheets

In the *Contact Optimization User's Guide*, the topic "The target control spreadsheet and pre-optimization flowcharts" should be "The target **cell** spreadsheet and pre-optimization flowcharts."

Also, do not relate TCS control cells to the Optimize process box in a pre-optimization flowchart. Declare control cells after optimization.

Fixed defects

This section lists defects that are fixed in IBM Contact Optimization version 9.1.0. The defects are sorted by defect number then by incident number (if applicable).

Issue ID	Description
Defect 7620	Truncated issue in Report Run drop-down list of Analysis tab
Defect 7628	Error message font is too small to read
Defect 4488	Checkbox overlay some strings in the Rule tab of Contact Optimization Session
Defect 1692	After creating an Optimize session and saving it, if you edit the session and give it a blank name, an error message is not displayed and the previous session name is not updated.
Defect 9140	ContactOptimization-ja: Truncation in the Report Type drop-down list
Defect 11540	Optimize server crash due to FEC Min/Max rule on AIX
Defect 5150	Contact Optimization session fails with TRYING TO REMOVE STALE PROPOSED RECORDS FROM PCT error.

Known issues

This section lists known issues in Contact Optimization 9.1.0.

Issue	Issue ID	Description
ContactOptimization-zh_CN, KO: Bad layout and alignment in the fourth page	Defect 7637	ContactOptimization-zh_CN, KO: Bad layout and alignment in the fourth page
After upgrading Campaign to 9.1, Optimize listener can no longer be stopped via ACOServer.sh.	Defect 81245	Users must upgrade Campaign and Contact Optimization together. If they cannot, they will need to stop the Contact Optimization listener manually through the task manager/kill command.
Create Contact Optimization session fails with multi-byte audience level name.	DEF023178	If a non-English language with multiple-byte characters is used to name an audience level, Contact Optimization fails to create Contact Optimization sessions that contain that audience level. To work around this issue, use English or single-byte character sets to name your audience levels.
Error messages for the ACOOptAdmin utility do not display according to non-English locales.	DEF051284	When you run the ACOOptAdmin command-line utility in a locale other than English, error messages do not display according to the specified locale. The error messages display only in English.

Issue	Issue ID	Description
Contact Optimization listener does not automatically use the same non-English locale that is used by Campaign listener.	ENH11618	In installations where Campaign and Contact Optimization are installed with a non-English locale, the Contact Optimization listener always starts in English instead of the installed locale. To work around this issue, in the command window or batch file (`ACOServer.bat` or `ACOServer.sh`) used to start the Contact Optimization listener, set LANG=*xx_XX* as follows. • Brazilian Portuguese - pt_BR • French - fr_FR • German - de_DE • Italian - it_IT • Japanese - ja_JP • Korean - ko_KR • Simplified Chinese - zh_CN • Spanish - es_ES On UNIX systems, use the following commands. `LANG=`*xx_XX* `export LANG`
`unprocessables_`*sessionid*`.csv` might contain some customers who receive offers.	DEF054841	In some scenarios, a few of the customers who get offers might be present in the `unprocessables_`*sessionid*`.csv` file.
Incorrect optimization result with Custom Capacity rule in specific circumstances.	DEF058362	A customer that satisfies the following criteria might receive fewer offers than wanted: • The customer has an even number of proposed transactions. • Each of these transactions has the same score. • This score is a low value.
Some labels display incorrectly in Japanese, Chinese, and Korean.	DEF059595	Some translated labels are displaying incorrectly. For example, when you edit the score matrix manually, the vertical label on the right side of the table displays upside down. Also, for optimization rules that contain **customers in the segment**, the **segment** label displays on two lines.
Offer filtering summary report displays an incorrect count of Proposed Contacts that are removed by each Custom Capacity rule.	DEF059805	The Offer Summary Report displays incorrect counts in the "Removed By This Rule" column for Custom Capacity rules if the participating Flowchart for this Contact Optimization session contains multiple contact dates and multiple offers that are made to each customer on different channels.
Issues with offer version query builder.	DEF060676	There are several minor issues with the offer version query builder: • For custom attributes with the Form Element Type of Select Box, the offer version query builder does not use the select box. You must enter the value manually. • When the group level is removed, the subgroup conditions are added to the parent condition, and vice versa. • All arithmetic operators are displayed for a string variable, but only equal and not equal apply. • Defined length validations for attributes are not verified upon input for conditions.

Issue	Issue ID	Description
Offer version rules that contain dates do not provide expected optimization results.	DEF061554	If you create an offer version condition that includes a date, such as the offer parameter "valid end date" equals "12/31/2011", the rule containing offer version condition might not be satisfied; however, the rest of the rules will work as expected.
Contact Optimization session run fails with a `Response XML is missing the data xml element` error.	DEF061116	If you receive this error, contact Technical Support. Also, send your Contact Optimization server logs for analysis.
Rule exceptions that span calendar years give incorrect results.	DEF061639	If you create a rule exception to a Min/Max # Offers capacity rule that spans calendar years, such as 07/01/2011 to 06/30/2012, the rule containing rule exception condition will not be satisfied; however, the rest of the rules will work as expected.

Known limitations

This section lists known limitations in Contact Optimization 9.1.0.

Issue	Number	Description
Negative scores cause inaccurate rules crediting.	DEF041400	If you use negative scores, rule crediting in the Offer Filtering Summary report might not be accurate. Offers with negative scores are given to meet minimum requirements only.
Cells that are linked to TCS with offer assignments do not appear in Optimize process.	DEF061355	If the Optimize process is connected to one or more cells and the upstream cells are later linked to top-down cells defined in the Target Cell Spreadsheet process (TCS), the offers that are assigned in the TCS do not automatically appear in the Optimize process. Link to any top-down cells in the TCS before you connect those cells to an Optimize process. Otherwise, you must either manually assign the same offers within the Optimize process, or delete the Optimize process and re-create it.
Running the ACOOptAdmin utility with one-way SSL requires more setup.	DEF046832	You cannot use the **ACOOptAdmin** utility with one-way SSL until you register a security certificate, specify a host name and domain, and configure SSL_Options in the `ACOOptAdmin.bat` file.
Unable to run the session in first attempt when unica_acosvr process stopped.	DEF055010	If you use the **kill** command to stop unica_acosvr, the next time you attempt to run a Contact Optimization session, it might fail with the following error `An unknown communication failure has occurred with the IBM Optimize server process`. **Workaround** - Run the Contact Optimization session again to complete it successfully.

New features and changes in version 9.0.0

The following new features and changes are introduced in version 9.0.0 of IBM Contact Optimization.

IBM Unica® Optimize renamed

IBM Unica Optimize is now known as IBM Contact Optimization.

The default installation directory is renamed to `ContactOptimization`.

Optimize sessions are now labeled Contact Optimization sessions.

ContinueOnGenerationLoopError

There is a new configuration property, `ContinueOnGenerationLoopError`. You can use `ContinueOnGenerationLoopError` to continue a Contact Optimization session if you receive the `The generation loop was unable to eliminate all slack and surplus variables` error. See the *IBM Contact Optimization Troubleshooting Guide* for more details.

Flowchart changes

The IBM Campaign flowchart workspace is redesigned to change the look and feel and improve usability.

The framework is now based on a Dojo component instead of Active-X.

The redesign includes changes to the appearance of flowchart and report components, including toolbars, dialog boxes, progress indicators, and related controls. The overall functionality is unchanged. However, some minor functionality is different. For details, see the *IBM Campaign Release Notes* and the *IBM Campaign User's Guide*.

Russian language support

The Russian language is now supported. For information about setting locale preferences, see the *IBM Marketing Platform Administrator's Guide*.

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*.

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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