IBM Contact Optimization
Version 9 Release 1.1
November 26, 2014

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

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 9.1.1 requires IBM Campaign 9.1.1.

You can upgrade to Contact Optimization 9.1.1 from Contact Optimization version 9.1. For instructions, see the *IBM Contact Optimization Installation Guide*.

Contact Optimization supports 64-bit operating systems only.

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 9.1.1

The following new features and changes are introduced in version 9.1.1 of IBM Contact Optimization.

IBM ExperienceOne Knowledge Center

Starting with version 9.1.1, you can view product documentation in IBM ExperienceOne Knowledge Center, which includes documentation for all of the products in the ExperienceOne family. Use IBM ExperienceOne Knowledge Center to:

- search across all documentation for a particular product.
- search across all of the products in the suite.
- bookmark topics.
- share links to specific topics.
- access IBM support and educational resources.

You can view common tasks, troubleshooting, and support documentation the same way you have in prior releases by using the **Help** menu in each product, including **Help > Product documentation** or **Help > Help for this page**. To get documentation on all other IBM products, use the IBM Knowledge Center at http://www.ibm.com/support/knowledgecenter/.

Perform a test run of a Contact Optimization session

You can tune your Contact Optimization session before a production run by performing a test run on a subset of the PCT data. After you run all the flowcharts that generate contact and offer information that the Contact Optimization session can access, you can run the Contact Optimization session that you created. You should perform a test run of the session to see whether the results of the optimization are what you expect. After you review the results, perform a production run to generate the final set of data.

Optimize a transaction query for performance improvements

You can use temporary tables instead of database-specific views to improve your performance. To optimize the Attribute Filter Query (AFQ) and improve your performance, you can enable the use of temporary tables. You can enable or disable the temporary table by going to **Advanced Settings > Database Tuning** at the Contact Optimization session level and setting **`Allow Temporary Tables`** to `True`. You can also configure this parameter in the Configuration Settings at `Affinium|Campaign|partitions|partition1|Optimize|DatabaseTuning|AllowTempTables`. By default, this setting is enabled because there is an improvement in the performance of larger sessions when you use temporary tables.

CAMPAIGN_HOME decoupled from Contact Optimization for distributed installations

You can run the Contact Optimization listener and related server utilities separate from Campaign. If you have Contact Optimization andCampaign on separate systems, from 9.1.1 onwards, you do not need to mount the Campaign directory for your Campaign installation as a network drive on the system that hosts Contact Optimization. The dependency on setting the CAMPAIGN_HOME environment variable is removed.

The MailList process performance is improved in case of post-optimized flowchart

In the post-Optimize flowchart, when a subset of IDs is extracted from an Optimized list, the processing logic has been enhanced to be able to work better on the set of selected IDs to gain runtime performance improvement. This is done through improved constraints on the set of data being queried during extraction.

Additional indexes for additional performance improvements

Beyond indexing the segment membership, contact history, and detailed contact history tables for each audience, and the PCT, POA, and RC tables for each session, there are other tables that you can index and update table statistics to improve the Contact Optimization session run performance. By default, the Contact Optimization installer will not add these extra indexes on campaign tables. These indexes should be added only if you find that Contact Optimization session queries are running slower than expected. Adding more indexes can degrade the performance for update queries, such as insert or update, on these tables. You can add these extra indexes and update table statistics by manually running the following database-specific SQL scripts:

1. `aco_extra_indexes_db2.sql`
2. `aco_extra_indexes_sqlsvr.sql`
3. `aco_extra_indexes_ora.sql`

These scripts can be found in the `<OPTIMIZE_HOME>/ddl` folder. Each script has three sections: delete index, create index, and update table statistics. Index scripts need to be run only one time. However, update table statistics queries need to be run periodically to keep table statistics up-to-date. It is recommended to run these table statistics queries before you trigger a large Contact Optimization session run.

Note: All three scripts contain a SQL script for the default detailed contact history table (UA_DTLCONTACTHIST). If a Contact Optimization session is defined on any other audience level, then the index and statistics SQL queries should be run on the appropriate detail contact history table.

Fixed defects

This section lists defects that are fixed in IBM Contact Optimization version 9.1.1. The defects are sorted by defect number then by incident number (if applicable).

Issue ID	Description
Defect 134432	If a user creates a Contact Optimization session and then creates a Campaign flowchart, they are unable to select Optimized Lists in the Extract process box.
Defect 164682	IBM Contact Optimization calculated value of score matrix is ignored.
Defect 155587	Special characters should not be entered in the session name field of Contact Optimization.
Defect 147055	In specific cases that contain a large number of "Never A with B" rules that have a cyclic dependency, IBM Contact Optimization generated sub-optimal results.
Defect 134478	A IBM Contact Optimization session that is configured with multiple For Each Customer Min / Max rules, having a nonzero minimum value, and using Strategic Segments but no rolling time windows sometimes returned sub-optimal results.
Defect 50961	On an extremely slow network, SSO tokens timed out depending on configuration, resulting in incorrectly showing a failed status for session runs on the Scheduled Runs page.

Known issues

This section lists known issues in Contact Optimization 9.1.1.

Issue	Issue ID	Description
Campaign Contact Optimization summary report is incorrect.	Defect 176368	If offer versions are used in a rule, the report that shows pre-optimization vs. post-optimization counts will always report the pre-optimization count of records as 1. The post-optimization counts will be correct.
Listener shows login error even in the case of an expired password.	Defect 175554	For the Campaign listener and Contact Optimization listener, the user is displayed a login failure error instead of an expired password error even if the password expired.
ContactOptimization-zh_CN, KO: Bad layout and alignment in the fourth page.	Defect 7637	For Korean and Simplified Chinese user interfaces, there are problems with the layout and alignment of a few messages in Contact Optimization sessions.

Issue	Issue ID	Description
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.	Defect 121703	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.
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.

Issue	Issue ID	Description
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.
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.
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 9.1.1.

Issue	Number	Description
Strings in the production or test pop-up window are not translated.	Defect 176920	In the case of a non-English setup, the strings in the production or test pop-up window are not translated.
Contact Optimization session run status should be consistent.	Defect 171288	In case of a crash of the Contact Optimization server, you will observe this inconsistency. You can click the ClearHistory button to clear the last run status. However, it also deletes history reports of the respective Contact Optimization session.
The MailList process fails with the following database error: `ORA-00999: INVALID VIEW NAME`.	Defect 170951	Change the value of **`UseTempTablePool`** from `TRUE` to `FALSE` in UA_SYSTEM_TABLES. The MailList run will end successfully.
Contact Optimization does not terminate the `unica_acsvr` process that is opened during a run.	Defect 164875	In case of schedule run of a Contact Optimization session by using the Marketing Platform Scheduler, you observe multiple `unica_acsvr` login processes. These process might terminate automatically after some time.

Issue	Number	Description
The Marketing Platform Scheduler is unable to recognize a Contact Optimization session that is located under multiple folders.	Defect 157537	If you schedule a Contact Optimization session that is located under two levels of sub-folders of a Contact Optimization session, you might observe the following error: `Unable to find a session with the specified name`.
A DB2 database user change of system tables causes a Contact Optimization session to fail when the administrator has an index with the same name.	Defect 155876	To avoid having a session fail, the DB2 database administrator should remove indexes.
A Campaign error message is displayed when you try to add or remove an offer or segment.	Defect 134440	When you add or remove an offer or segment, you get a Campaign error message displayed from the Contact Optimization session Summary page of a session that was scheduled.
The Contact Optimization session run command is captured in recent links.	Defect 177376	If you go to a session by using recent links, you can run the session by pasting the URL directly.
In a Contact Optimization report, offers by type and segment do not get printed as desired.	Defect 102889	The following issues were noticed while printing the offers by type and segment in a Contact Optimization report. 1. The preview window does not scroll, unless it is re-sized. 2. While printing it does not print everything, but only what fits in A4 size. Printing options do not seem to make any difference.
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 9.1.0

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.

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.

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