Note

Before using this information and the product it supports, read the information in “Notices” on page 7.
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System requirements and compatibility

Before you install Leads, make sure to check the system requirements and compatibility as described in the following section.

You can install Leads as a new installation, or upgrade to this version from versions 8.6.0 or 9.0.

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.

Report package reference documentation

Reference documentation for report packages is no longer available on the documentation server where the PDF versions of the product documentation are posted. You can access the reference documentation for report packages after you install the reporting schemas on the machine where the Marketing Platform is installed. The reference documentation is in a subdirectory of the Cognos10 directory under the report package installation.

New features and changes in Leads 9.1

The following section describes the new features and changes that are introduced in the 9.1 version of Leads.

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.
Fixed defects

The following table lists the defects that are fixed in Leads 9.1 version.

Table 1. Fixed defects

<table>
<thead>
<tr>
<th>Issue ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEF063436</td>
<td>Password was visible in log when debug logging is turned on. The issue is fixed in 9.1.</td>
</tr>
<tr>
<td>PO01695</td>
<td>Support for Cognos® authentication mode is added to access leads reports from Leads application.</td>
</tr>
<tr>
<td>PO01405</td>
<td>Webservice calls from external systems to leads application to start the Affinium Leads Integrator (ALI) were failing due to changes in the request format. The issue is fixed in 9.1, and a new way of initiating the web-service ALI is also provided.</td>
</tr>
<tr>
<td>PO01671</td>
<td>The ALI scripts that contain more than 3 consecutive calls to web services were failing. The web service calls after 3 successful calls were getting timed out. The issue is now resolved.</td>
</tr>
</tbody>
</table>
| PO01435  | <webservice> tags in ALI scripts are not recognized by IBM Leads 8.6. ALIs that uses <webservice> tags were failing, and the following error message was displayed:  

Unknown tag <webservice>.  

The issue is now resolved. |
| PO00253  | The Select Leads check box on the batch update page that is toggled between the 'selected' and 'cleared' state, even if a user clicked the row to set other values. The issue is fixed in 9.1. |
| PO00542  | The connection requests to Simple Mail Transfer Protocol (SMTP) were not getting timed out. This causes other notifications to wait for the previous thread to release the control and results into a failed notification. The issue is resolved in 9.1. |

Known issues

The following table lists known issues in Leads 9.1.

Table 2. Known issues in Leads 9.1

<table>
<thead>
<tr>
<th>Issue</th>
<th>Issue ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of Special Characters in User's login name</td>
<td>Task 4958</td>
<td>In 9.0 release, a new enhancement is implemented in Marketing Platform, which restricts the use of few special characters in user's login name. In Leads, no such restrictions are applied on the use of special character in user's login name. If you create a user with non-supported special character, then that user can complete any operations in Leads but not in Marketing Platform. You get JavaScript error on Platform home page.</td>
</tr>
<tr>
<td>Issue</td>
<td>Issue ID</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Incorrect Java™ information on Leads About page</td>
<td>Defect 11474</td>
<td>On the Leads About page, the Java version is displayed as 2.6, which must be 1.7 Java Runtime Environment (JRE). For Marketing Platform the Java version is displayed as 2.4, which must be 1.6. This issue is observed only when Leads is deployed on WebSphere® 8.x version. For WebSphere 7.x version, information is correct. If you deploy Leads 8.5 on WebSphere 8.x, the Java version is shown as 2.6.</td>
</tr>
<tr>
<td>Closed leads are deleted even when the owner is replaced with another user</td>
<td>DEF061313</td>
<td>If you delete a user, closed leads that are assigned to the user also are deleted.</td>
</tr>
<tr>
<td>Organization for user is not reflected correctly after modification</td>
<td>DEF061323</td>
<td>Change in user's organization that is not updated in F_Lead &amp; F_Lead_Assignment tab</td>
</tr>
<tr>
<td>On certain operations, user might see same lead with Cur_Snapshot_Flag set to 1</td>
<td>DEF061340</td>
<td>Same Lead has Cur_Snapshot_Flag=1 for two entries in f_Lead_Assignment</td>
</tr>
<tr>
<td>Cross site scripting issue on the User Role page</td>
<td>DEF062489</td>
<td>X-Site scripting issues that are found in Configure &gt; User Roles</td>
</tr>
<tr>
<td>The view dropdown and filter icon must not be shown on the window.</td>
<td>DEF062696</td>
<td>8.1 Leads filter is displayed on Analyze Leads page for selected user.</td>
</tr>
<tr>
<td>Users not re-created in Marketing Platform after removal</td>
<td>DEF28947</td>
<td>A user that is removed from Marketing Platform cannot be added back to Marketing Platform by using the Leads Admin Console Create Users in Marketing Platform system repair tool. To work around this issue, remove the user from both the Marketing Platform and Leads, and then re-create the user in Leads.</td>
</tr>
<tr>
<td>LEAD_PURGE procedure is not upgraded for 9.1</td>
<td>Defect 91455</td>
<td>The LEAD_PURGE procedure is not upgraded for 9.1, and the substatus entries are not deleted from the OLTP tables. To work around this issue, go to the Admin section and install the stored procedures.</td>
</tr>
<tr>
<td>Incorrect OS information on Leads About page</td>
<td>Defect 51860</td>
<td>Incorrect information about the operating system is displayed on About page. To work around this issue, add correct information about the operating system in the About.xml file, and import the file manually. Note: The workaround is required only for Windows 2012 server with Weblogic</td>
</tr>
</tbody>
</table>
New features and changes in version 9.0.0

The following section describes the new features and changes that are introduced in the 9.1 version of Leads.

The name of the application is changed

Unica® Leads is now known as IBM Leads. References to "Unica" are removed from the product.

Russian language now supported

Russian language is added to the list of support languages for Leads.
- Brazilian Portuguese (pt_br)
- English (en_us)
- French (fr_fr)
- German (de_de)
- Italian (it_it)
- Japanese (ja_jp)
- Korean (ko_kr)
- Simplified Chinese (zh_cn)
- Spanish (es_es)
- Russian (ru_ru)

Documentation changes for the Installation Guide

If you are using SQL Server for your Leads system tables, you must add a custom property with the following settings.

Name: webSphereDefaultIsolationLevel

Value: 1

Data type: Integer

This setting is not specific to SQL Server 2005, but it is also required for 2008/ 2008 R2.

IBM EMM installation and upgrade improvements

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- 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.
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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