

RedPoint Interaction Version 5.1 – Release Note

1 About this Document

This document describes RedPoint Interaction (RPI) version 5.1. It contains the following sections:

- Major Features: this section describes the most significant enhancements to RPI introduced in the new release.
- Plugins: this section details new, and changes to existing, plugins included in RPI v5.1.
- Other Features: this section describes other features added in RPI v5.1.
- Upgrade Notes: this section describes considerations that should be borne in mind when upgrading to RPI v5.1.

2 Major Features

The following section documents the major enhancements that have been introduced in RPI v5.1.

Auxiliary Database Usage Expansion

The contexts in which auxiliary database attributes and rules can be used have been significantly expanded, meaning that greater advantage can be taken of data persisted across multiple databases. Highlighted examples include the following:

- Auxiliary rules (selection and decision) can now be used in audience filter, suppressions and split blocks.
- As a consequence, the auxiliary filter block becomes redundant, and is no longer available in the toolbox. However, any audiences including auxiliary filter blocks created in previous versions of RPI will continue to function as set.
- Auxiliary attribute values can now be written to offer history.
- Auxiliary attributes can be used when specifying deduplication behavior.
- Use of auxiliary attributes and selection rules is supported at cell lists (dimensions, sampling rule).
- Auxiliary attributes can be used in export templates (in the Attributes and Sort Order tabs, and to define deduplication sampling).
- Auxiliary attributes can now be dropped directly into content at digital assets, and email and SMS offers.
- Dynamic asset applicability determination can now be carried out using auxiliary attributes and selection rules.

Note that the ability to restrict the output of auxiliary data (e.g. using auxiliary attributes in an export template) can be controlled at the level of an RPI client through a new Server Workbench Clients interface setting.

Note also that RedPoint Data Management can now also be used to move keys between the data warehouse and auxiliary databases; this has the potential to significantly improve performance when multiple databases are used.

User story reference: 135, 136, 6766, 6842, 6843, 6844, 6854

Embedded-only Audiences

It is now possible, when building an audience, to specify that it is only able to be used as an embedded audience. Such audiences can only be used in the context of an audience block, and not directly as batch or interactive audiences within an interaction workflow.

Embedded-only audiences realize the following benefits:

- An audience definition is not required to support an embedded audience, meaning that the number of definitions can be reduced.
- Audience logic can be executed directly within an auxiliary database, and the results leveraged in the outer audience. Note that only auxiliary databases that support audience execution – i.e. those that can host a data warehouse – can be used in this context.

At a SQL client with a NoSQL auxiliary database, the option is also provided to create a NoSQL embedded-only audience.

User story reference: 6812, 6813

New NoSQL Database Providers

RPI's existing support for the MongoDB NoSQL database provided is complemented by support for the use of the following NoSQL database providers as a data warehouse and/or auxiliary database:

- Couchbase
- CosmosDB

User story reference: 4929, 6881

File Templates

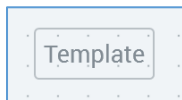
The concept of a 'file template' has been introduced in RPI v5.1. File templates are files from which other files can be created. On creating a new file based on a file template, the new file inherits all of the template's properties and configuration.

File templates are supported at audiences, offers and interactions.

File templates are differentiable in the RPI file system through an augmented icon:



In addition, a watermark, displayed on a file template's workspace, advises of its template nature:



File templates are restricted in terms of the functionality they offer. In particular:

- Audience templates cannot be used at an interaction batch audience or interactive activity.
- Offer templates cannot be used at an interaction offer, audience or queue activity.
- Interaction templates cannot be executed in Production mode.

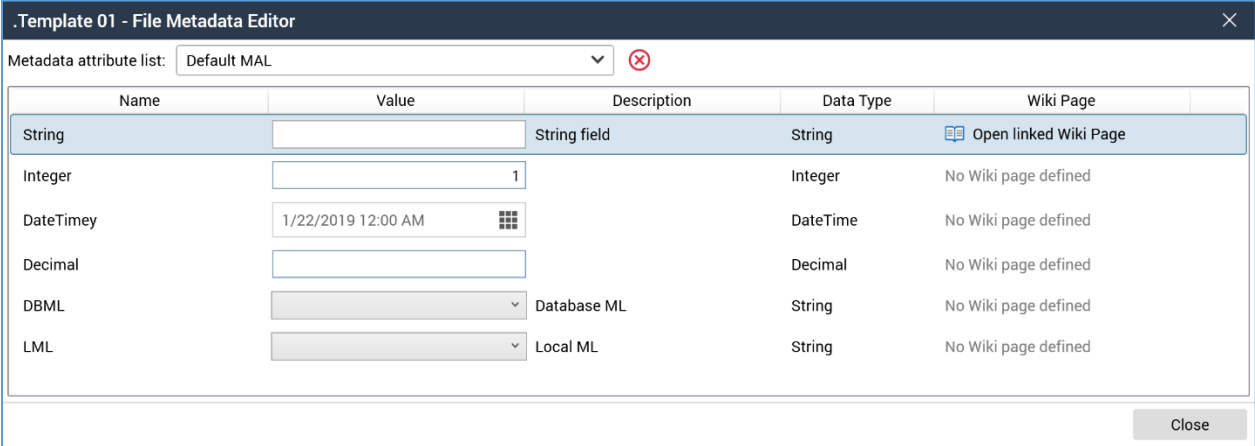
User story reference: 6715

File Metadata

The ability to capture metadata at the level of a file within the RPI file system has been added. Having specified file metadata values at a file, they can be searched upon in the File System Dialog.

The set of metadata attributes available at a file is defined using an Attribute List. Attribute lists are defined in a new configuration interface, covered separately in this document.

File metadata is managed in the File Metadata Editor dialog:



The screenshot shows a dialog titled ".Template 01 - File Metadata Editor". At the top, there is a dropdown menu for "Metadata attribute list" set to "Default MAL". Below this is a table with the following columns: Name, Value, Description, Data Type, and Wiki Page.

Name	Value	Description	Data Type	Wiki Page
String		String field	String	Open linked Wiki Page
Integer	1		Integer	No Wiki page defined
DateTime	1/22/2019 12:00 AM		DateTime	No Wiki page defined
Decimal			Decimal	No Wiki page defined
DBML		Database ML	String	No Wiki page defined
LML		Local ML	String	No Wiki page defined

At the bottom right of the dialog is a "Close" button.

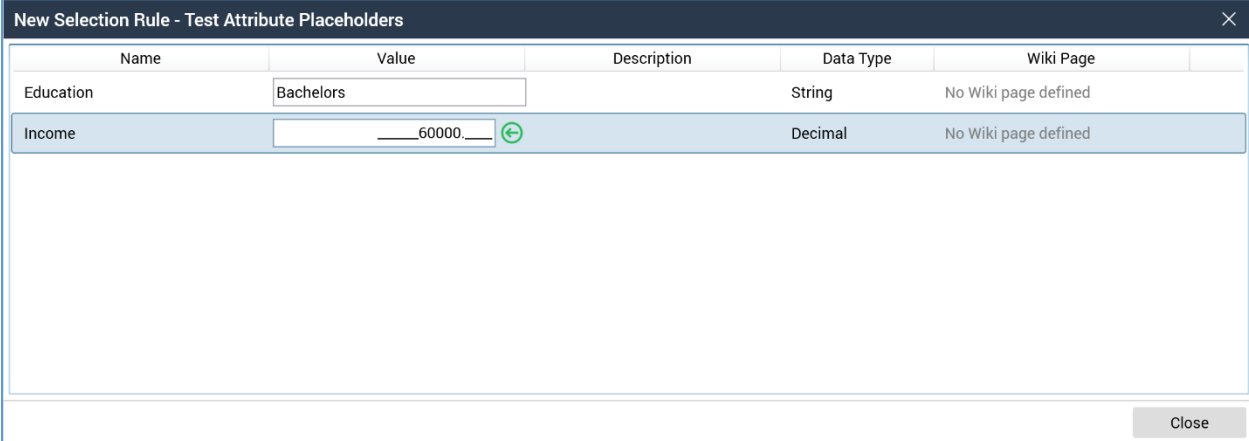
File metadata can also be specified at list assets within a dynamic or goal driven asset, and at message list slots within an inbound message list. When such assets or message lists are published/enabled, details of the metadata assigned to specific list assets or message slots are captured in a database table, meaning that metadata bound to specific rendered content can be associated with a site visitor. Similarly, metadata captured at a landing page or web form is also written to a database table.

User story reference: 3529, 3931, 3932, 4032, 5070, 7058, 7087

Selection Rule Placeholders

Selection rules now support the use of Placeholder Attributes when creating criteria. Placeholder attributes are created from the new Attribute Lists configuration interface (covered separately in this document).

Placeholder attributes can be used for two purposes. The primary use case is to use a placeholder attribute as the comparison attribute when creating a compare to attribute criterion. You can then specify a value for the placeholder attribute using the Attribute Placeholders Dialog:



Name	Value	Description	Data Type	Wiki Page
Education	Bachelors		String	No Wiki page defined
Income	60000		Decimal	No Wiki page defined

On executing the rule, the count of matching records is determined by comparing the 'left hand' attribute at the criterion to the value provided in the dialog. Values can similarly be applied at the Audience Designer, allowing for the passing of parameters into an audience test, and at the Interaction Designer, where the specification of values supports parameterized workflow execution.

The secondary use case is to create a criterion within a selection rule based on a placeholder attribute, and then use the value provided for the placeholder attribute to activate or deactivate an 'OR' statement within the rule.

User story reference: 900

Attribute Lists

A new configuration interface has been made available to manage Attribute Lists.

Attribute Lists

Name	Is Placeholder List	State
7257	✓	Unchanged
Default MAL	✗	Unchanged
New MAL	✗	Unchanged
Parameter AL 01	✓	Unchanged
Parameter AL 02	✓	Unchanged
Parameter AL 03	✓	Unchanged

Details

Attributes

Selected Attribute List Details

Name:

Parameter AL 01

Description:

Use for placeholders:

☒ This Attribute List is used to define placeholders for use within Selection Rules

Placeholder attribute folder:

Parameter AL 01\

✗ Folder to store a...

Attribute Lists are used in two contexts in RPI:

- To manage placeholder attributes, which can be used in selection rule criteria.
- To facilitate the capture of file metadata

Both are covered separately in this document.

User story reference: 5068

3 Plugins

Email Service Providers (ESPs)

New ESPs

Support has been added for a single new ESP:

- MailChimp (*User story reference: 6824*)

Existing ESP Changes

The following changes have been made in the context of RPI's existing ESP connectors:

- CheetahDigital:
 - The ability to specify the IP pool to be used has been added at CheetahDigital email channel configuration (*User story reference: 6788*).
 - A new Remove footer option, which facilitates the removal of the default email footer text, has also been made available at channel configuration (*User story reference: 6749*).
 - A Load data fields button has been made available at channel configuration. Clicking it populates data entity fields in the same context. Any existing mappings are not affected. A Clear all data fields button has also been added (*User story reference: 6995*).
 - The CheetahDigital email plugin now supports execution in a NoSQL environment (*User story reference: 6559*).
 - The ability to Stop and Pause a CheetahDigital email offer during execution has been added (*User story reference: 6750*).
- DotMailer:
 - The RPI ESP plugin has been updated to reflect the provider's change of name to 'Dotdigital' (*User story reference: 7060*).
- IBM Marketing Cloud
 - The ability to retain data files post-email offer execution has been added (*User story reference: 7290*).
- Listrak
 - The ability to choose an existing list, as managed in the Listrak portal, has been added (*User story reference: 7263*).
 - The Listrak email plugin now supports execution in a NoSQL environment (*User story reference: 6558*).
- Salesforce Marketing Cloud (SFMC) Data Transfer:

- New SFMC Existing Undeliverables, SFMC Existing Unsubscribes and Specific Link Clicks fulfillment states are now available (*User story reference: 5618*).
- SendGrid:
 - When configuring a SendGrid channel, the Username and Password are only visible when using v3 of the SendGrid API (*User story reference: 6955*).
- SparkPost:
 - New properties (IP pool, Campaign ID and Subaccount) have been made available at channel configuration (*User story reference: 4451*).

Database Plugins

New Data Warehouse Providers

Support for the following new data warehouse providers has been added:

- Google BigQuery (*User story reference: 6716*)
- Snowflake (*User story reference: 1966*)

Mobile Plugins

Support for a single new SMS provider has been added:

- CheetahDigital SMS (*User story reference: 5392, 7627, 6559*). Note that the provider is also supported in a NoSQL context.

Social Plugins

Changes have been made in the context of the following social plugins:

- Facebook:
 - The ability for a post to be made to the timeline of the Facebook user who authorized a Facebook channel has been deprecated (*User story reference: 7394*).
- Facebook Offline Conversions:
 - Support has been added for Facebook Offline Conversions, which allows RPI to send offline conversion events to Facebook. Facebook offline conversion measurement capabilities allow for the tracking of when transactions occur in physical business locations and other offline channels after people see or engage with Facebook ads (*User story reference: 6625*).
- Facebook Custom Audiences:
 - NoSQL support has been added (*User story reference: 6560*).
- Foursquare:
 - The RPI Foursquare plugin is now compatible with v2 of the provider's API (*User story reference: 7519*).
- LinkedIn:
 - The RPI LinkedIn plugin is now compatible with v2 of the provider's API (*User story reference: 7107*).
- Twilio Notify:
 - NoSQL support has been added (*User story reference: 6561*).

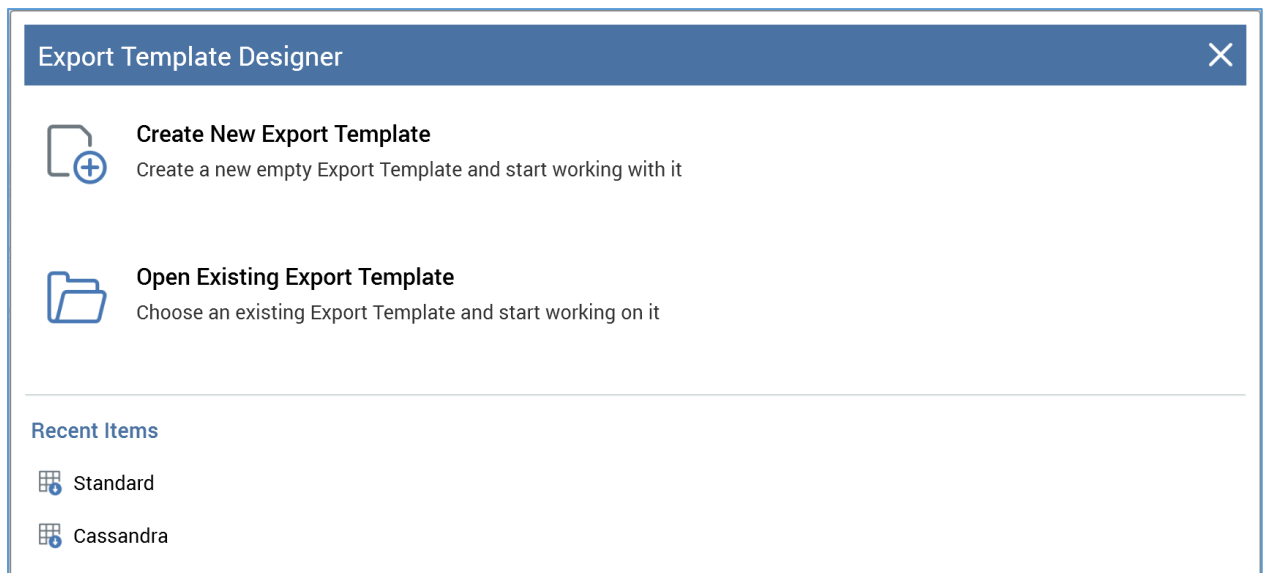
- Twilio Notify Direct:
 - NoSQL support has been added (*User story reference: 6562*).
- Twitter Direct:
 - NoSQL support has been added (*User story reference: 6563*).

4 Other New Features

The following features are also introduced in RPI v5.1:

'Create New' Changes

On clicking Create New in a single file designer (e.g. Audience, Export Template, etc.), the same overlay that is displayed on invocation of an empty designer from the Quick Access menu is now displayed.



User story reference: 7361

Compare to Relative Date Range Selection Criterion

A new Compare to Relative Date Range criterion type is now available at the selection rule.

Create a New Criterion in 'New Selection Rule' using 'Birth Date'

Relative Date Range Comparison

Birth Date is between

Start

Is before now

End

Is after now

Duration

1

days

Duration

1

days

Back

Finish

Cancel

This allows you to create a criterion that specifies that a matching attribute values are between a defined Start and End relative to the point of the rule's being run.

User story reference: 3737

Preview Email by Recipient

A new Preview By Recipient option has been made available in the Email Offer Designer. This allows you to search for a record using functionality also leveraged in the Single Customer View.

Search for Recipient

View: DCV

Scope: Customer

Customer Key

First Name

J

Last Name

Address Line 1

Gender

Birth Date

Enter date

Clear

Search

Search Results

Customer Key	First Name	Last Name	Address Line 1	Gender	
11,000	Jiminy	Hinder	Aaaardvark Court	M	4/8
11,001	J	Huang	2243 W St.	F	5/1
11,002	J	Torres	5844 Linden Land	M	8/1
11,005	Julio	Ruiz	7305 Humphrey Drive	M	8/5
11,006	Janet	Alvarez	2612 Berry Dr	F	12/
11,010	Jacquelyn	Suarez	7800 Corrinne Court	F	2/6
11,020	Jordan	King	7156 Rose Dr.	M	9/2
11,027	Jessie	Zhao	213 Valencia Place	M	12/
11,028	Jill	Jimenez	9111 Rose Ann Ave	F	4/1
11,029	Jimmy	Moreno	6385 Mark Twain	M	12/

Cancel

Choose

Having located the individual in respect of which you wish to view an email preview, a rendered version of the mail's content, tailored in accordance with the individual's characteristics, is displayed.

Recipient Email Preview

Content: HTML

Hi, Jiminy - and welcome to Dream Drives Fall 2018 newsletter! It's been a crazy busy few months, with gorgeous metal aplenty to feast your eyes on. Here are just a few of the machines we've been featuring recently - and some to watch out as the years ends...

The Ultimate 911?



Back Close

User story reference: 2145

Operations/Server Workbench – Execution Services Interface

A new Execution Services tab, which provides visibility of work undertaken at the current RPI cluster's Execution Service(s), has been made available in the Operations interface.

The screenshot displays the 'Execution Services' interface. At the top, it shows 'Master node: Registered' and 'Last updated status: 4/25/2019 3:54:27 PM'. Below this is a table with columns: Server Name, Last Status Update, Last Work Started, Last Work Completed, Work Items, System Tasks, Client Jobs, and a partial 'A' column. The first row shows 'TRYFAN' with various timestamps and counts (3, 3, 0).

Below the first table is a section titled 'Execution Services Work Items'. It includes filters for 'Last status update from' (4/25/2019 12:00 AM) and 'to' (4/26/2019 12:00 AM), a 'Show' button, and a dropdown menu set to '(All Statuses)'. The main table has columns: Active, Name, Type, Status, File, Server Name, and Active. It lists several completed tasks such as 'Preview offer by recipient', 'Customer View Search', 'Workflow Tidyup', and 'Audience Snapshot'.

Server Name	Last Status Update	Last Work Started	Last Work Completed	Work Items	System Tasks	Client Jobs	A
TRYFAN	4/25/2019 3:54:25 PM	4/25/2019 2:54:24 PM	4/25/2019 2:54:25 PM	3	3	0	

Active	Name	Type	Status	File	Server Name	Active
☒	Preview offer by recipient	Client Job	Completed			0.00:0
☒	Customer View Search	Client Job	Completed			0.00:0
☒		Workflow Tidyup	Completed			0.00:0
☒	Audience Snapshot	Audience	Completed			0.00:0
☒		Workflow Tidyup	Completed			0.00:0
☒	Audience Snapshot	Audience	Completed			0.00:0
☒	Refresh 'Geography Code' Value...	Client Job	Completed			0.00:0
☒		Workflow Tidyup	Completed			0.00:0
☒	Audience Snapshot	Audience	Completed			0.00:0
☒		Workflow Tidyup	Completed			0.00:0

The same interface has also been added at the RPI Server Workbench, where it provides access to the same information across all clients in the RPI cluster.

User story reference: 6613, 7237

Single Customer View – NoSQL Support

Support has been added for running the RPI Single Customer View in a NoSQL environment.

User story reference: 6717

Alerting Changes

The following changes have been made in the context of RPI alerts:

- Workflow Paused: new Test and Production Workflow Paused alerts have been added (*User story reference: 5766*).
- Long-running activity: new Test and Production Long Running Activity alerts have been added. These are sent when activity execution exceeds a configurable duration (*User story reference: 6424*).

- Failure zip attachment: optionally, on the occurrence of a Test or Production interaction workflow failing, a zip file can be attached to the alert email. This contains query trace and server log details, along with a series of other files that might help with issue diagnosis (*User story reference: 5344*).

Workflow Diagnostic Information

The ability to download a zip file containing diagnostic information relating to a workflow instance has been added to the Results Window. The zip file contains query trace and server log details, along with a series of other files that might help with issue diagnosis.

User story reference: 7213

Data Intake Enhancements

The following enhancements have been made in the context of Data Intake (aka the Data Project Designer):

- The ability to select which imported data are to be exposed in RPI as attributes (*User story reference: 5639*)
- The ability to specify an expiry date at a data project, and receive alerts in respect of the same (*User story reference: 6280*)

Realtime Audit

The optional ability to audit RPI Realtime activity (including the number of calls to and endpoint, and the number of records returned) has been added.

User story reference: 3777

Realtime Visitor ID Obfuscation

The optional ability to obfuscate RPI Realtime visitor IDs as returned by calls to the RPI Realtime API has been added.

User story reference: 7735

Offer History Details Sandbox Table

The optional ability to record offer history details data to a sandbox table has been added in RPI v5.1.

User story reference: 4775

Offer History Backfill Files

Offer history backfill files can optionally be generated during interaction workflow execution. Backfill files can be used by external processes to populate a reporting repository. Separate backfill files can be generated for offer history, offer history meta and offer history details tables.

User story reference: 6657

Managed Lists now Value Lists

The Managed Lists configuration interface's name has changed; managed lists are now referred to as 'value lists'.

Work item reference: 7074

Map Item Attribute – JSON Support

Map item attributes now support data persisted as JSON.

This feature is supported at the following database platforms:

- AWS Redshift
- Amazon Aurora (v5.7.x)
- Azure PostgreSQL
- Azure Database MySQL
- Azure SQL Database
- Cassandra (Compare to List criteria not supported)
- DB2
- MySQL
- MariaDB
- Oracle (v12.x)
- PostgreSQL
- Snowflake
- SQL Server (2016+ only)
- Teradata (v15)
- Vertica

User story reference: 7021, 7090

Audience Block Builder Size Retained

The size of the Audience Block Builder Window is now maintained on a per user, per client basis, so that it is always shown as per its most recent invocation in a given context.

User story reference: 6941

Open Rules Directly from Audience Blocks

You can now open the latest version of a selection or decision rule directly from its display in a suppressions or split block.

User story reference: 5307

Assign Seed to Group from Seeds List

A new Manage Seed Groups for the Selected Seed dialog allows you to assign seed groups to and remove seed groups from a given seed.

User story reference: 5649

Widget Changes

- **Save as:** a new Save as button allows a widget, with its specific configuration, to be saved to the RPI file system as an independent file. This file can then be added to other dashboards to take advantage of the previous configuration undertaken therein (*User story reference: 6350*).
- **Clone:** a new Clone option allows you to create an exact copy of a widget, again taking advantage of any previous configuration (*User story reference: 6350*).
- **Count results widget 'Daily' count update frequency:** the cadence at which a count results widget, configured to show daily counts, is updated has been made configurable (*User story reference: 6520*).

Designer Toolbox Section Height Maintenance

The relative heights of sections within designers' toolboxes are now maintained on a per designer per user basis.

User story reference: 4815

Paste File into Folder Where Exists

The ability to paste a file into an RPI file system folder where a file with the same name and file type already exists has been added. The file is pasted as '[Filename] - Copy'; if a file with this name already exists, an incrementable integer is added to the name to ensure its uniqueness.

User story reference: 5072

5 Upgrade Notes

The following points should be borne in mind when upgrading to RPI v5.1:

- System configuration setting 'OverrideDataIntakeNetworkRootDirectory' has been renamed 'DataManagementOverrideNetworkRootDirectory'.
- The LinkedIn dashboard part has been deprecated.