Redpoint Interaction Version 6.1 – Release Note

1 About this Document

This document describes Redpoint Interaction (RPI) version 6.1. 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 v6.1.
- Other Features: this section describes other features added in RPI v6.1.
- Upgrade Considerations: this section describes considerations that should be borne in mind when upgrading to RPI v6.1.

2 Major Features

The following section documents the major enhancements that have been introduced in RPI v6.1.

Smart Assets and Assets

RPI v6.1 sees the introduction of Smart Assets and Assets.

Migration

Previously, RPI provided Digital Assets and Message Lists. These file types have been migrated as follows:

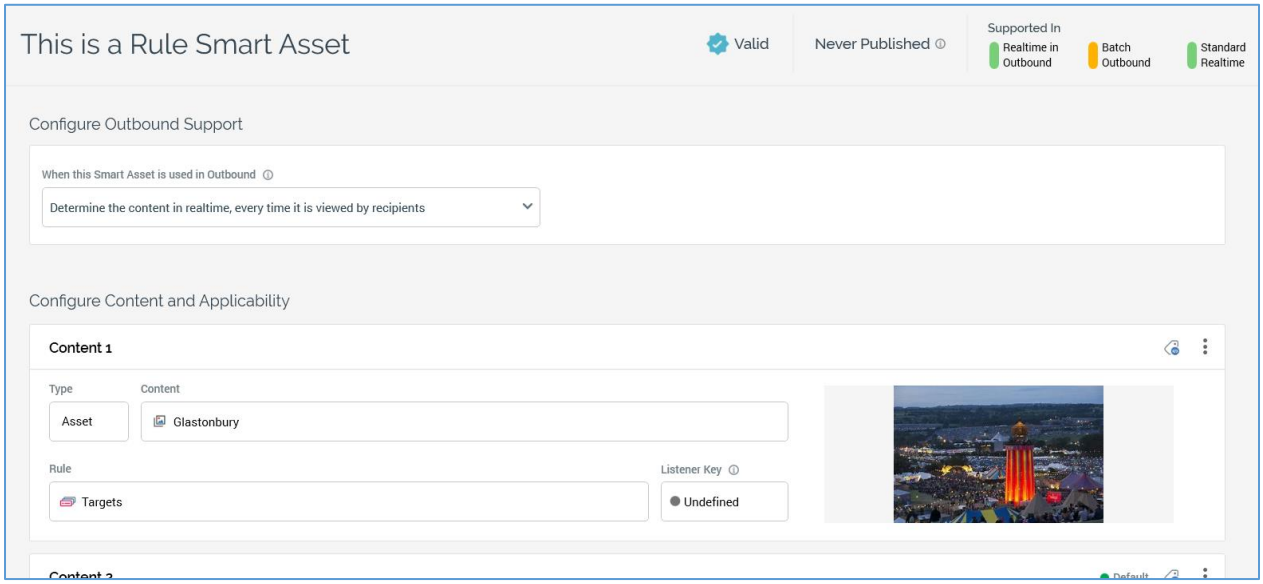
- The following types of digital asset are all now Assets:
  - Text Asset
  - HTML Asset
  - Image Asset
  - Table Asset
  - Web Form Asset
- Dynamic Assets are now covered by several types of Smart Asset:
  - Attribute Smart Asset
  - Audience Segment Smart Asset
  - Rule Smart Asset
  - Model Smart Asset
- Goal Driven Assets are now Goal Smart Assets.
- Inbound Message Lists are now Advanced Smart Assets.
- Outbound Message Lists have been deprecated. Note that existing interaction functionality can be employed as part of a manual migration of any existing outbound message lists.

Assets

All asset types' functionality remain exactly as per their digital asset equivalents.

Smart Assets

Smart Asset (formerly Digital Asset) designers have been revisited:

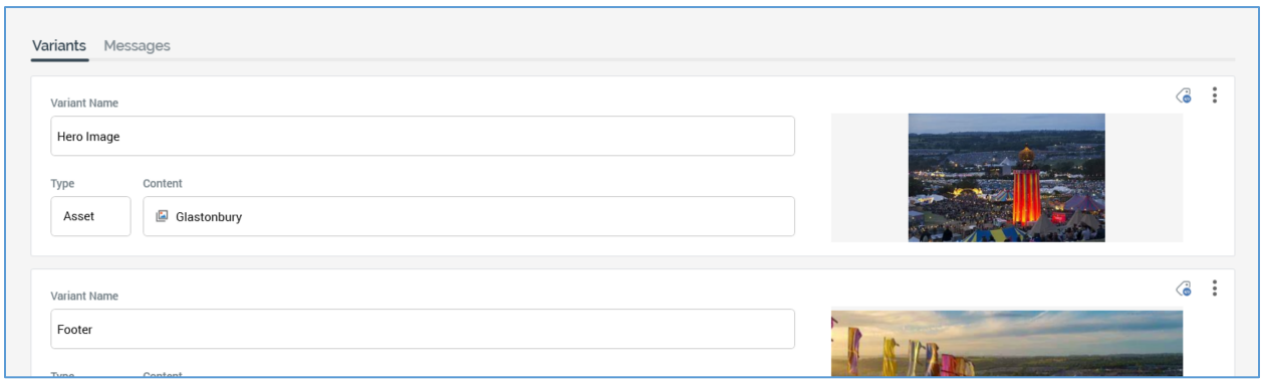


Functionality remains largely as per RPI v6.0; however, the ability to use the RPI Realtime services to dynamically vary content in outbound offers has been added at Rule, Model and Goal Smart Assets. For more information, please see Realtime Ubiquity, below.

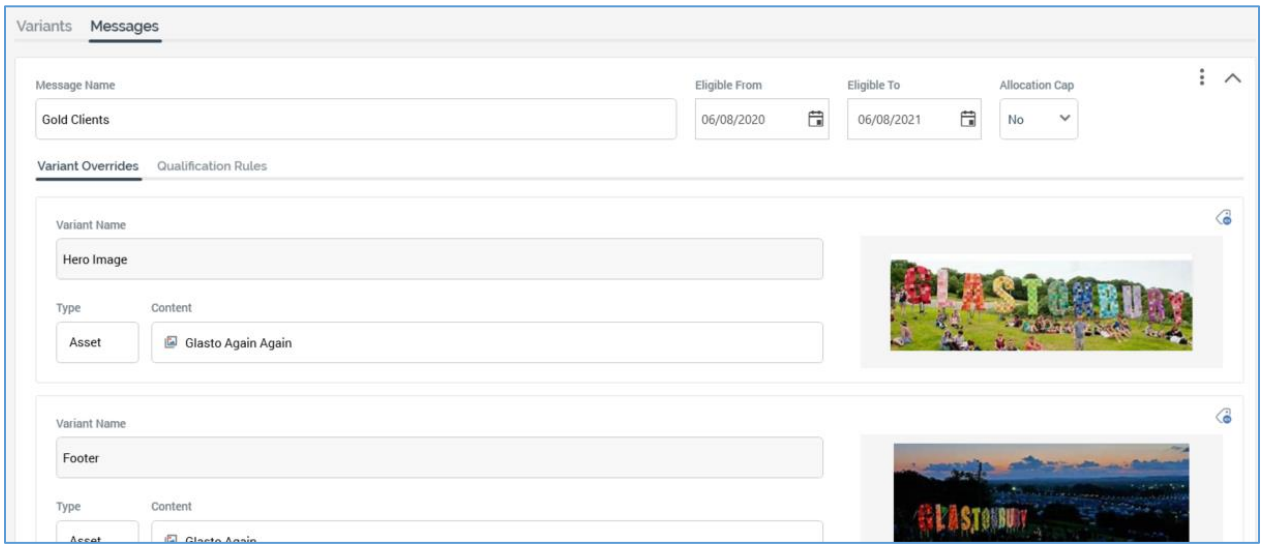
Advanced Smart Assets

Advanced Smart Assets replace Inbound Message Lists (IBMLs), but offer more flexibility. An Advanced Smart Asset can be used in an inbound context (as could an IBML); in addition, an Advanced Smart Asset can also be used to vary content in an outbound offer.

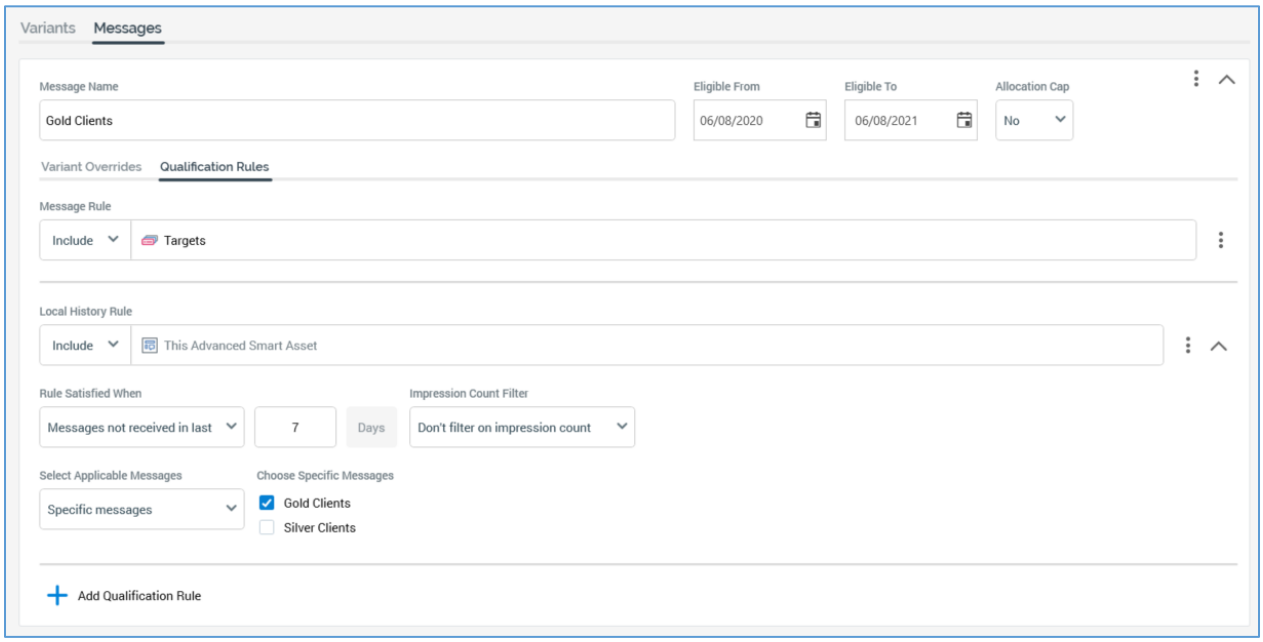
An Advanced Smart Asset allows for the definition of 'Variants', which define separate facets of a communication or page – e.g. a Hero Image, Sidebar or Footer:



In addition, 'Messages' can be defined. These represent variations on content that can be served for each variant, depending on the audience:



Determination of who is to be served which message (or default variant content) is made using Qualification Rules. These allow for determining message receipt on the basis of being targeted by a selection rule or realtime decision, or having been previously served a message from the current or another Advanced Smart Asset:



User story reference: 746, 896, 10677, 11288, 11386

Realtime Ubiquity

The introduction of Smart Assets realizes another benefit through the ability to use the RPI Realtime services to determine content applicability in an outbound context (such as an email offer), as well as in real time in an inbound context (such as a visitor's being presented with appropriate image in a web page, or a decision be made via the RPI Realtime API). In this way, Realtime Ubiquity is realized – the same smart asset can be used in both places.

For example – an email, containing a product image, is send to a customer. On opening the mail, the customer is presented with an offer. The customer subsequently diverges from their original path of engagement, and would benefit from presentation of a new, more relevant offer. On returning to the same email, the new offer is displayed. On visiting the website, the appropriate offer can be presented to the visitor via the same smart asset.

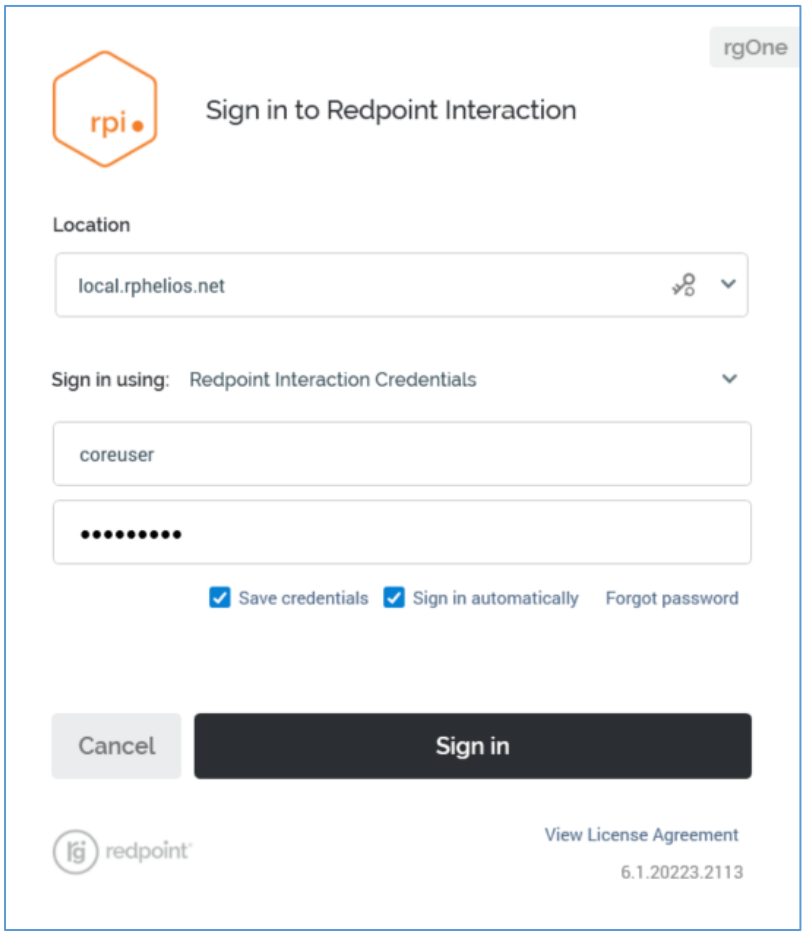
The RPI Realtime services can also be used to dynamically change hyperlink targets within an offer.

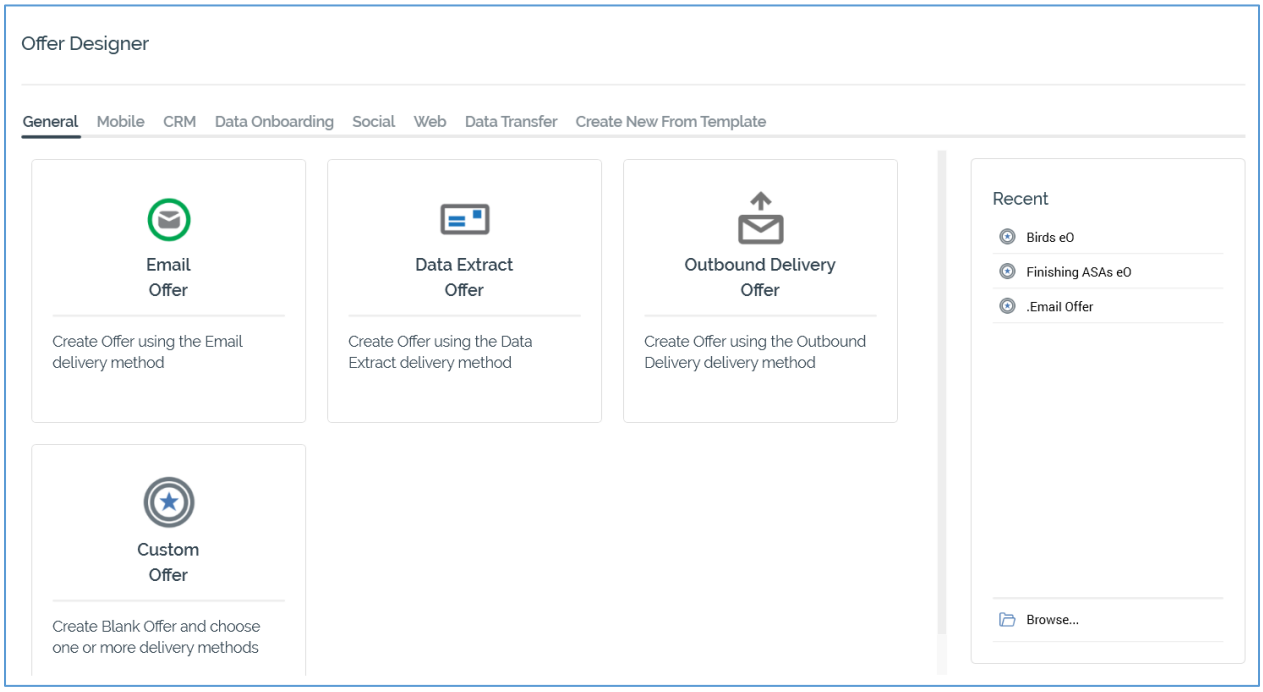
As a consequence of the above, the Realtime Details Report (formerly the Published Details Report) can now be used to display realtime personalization results within an interaction.

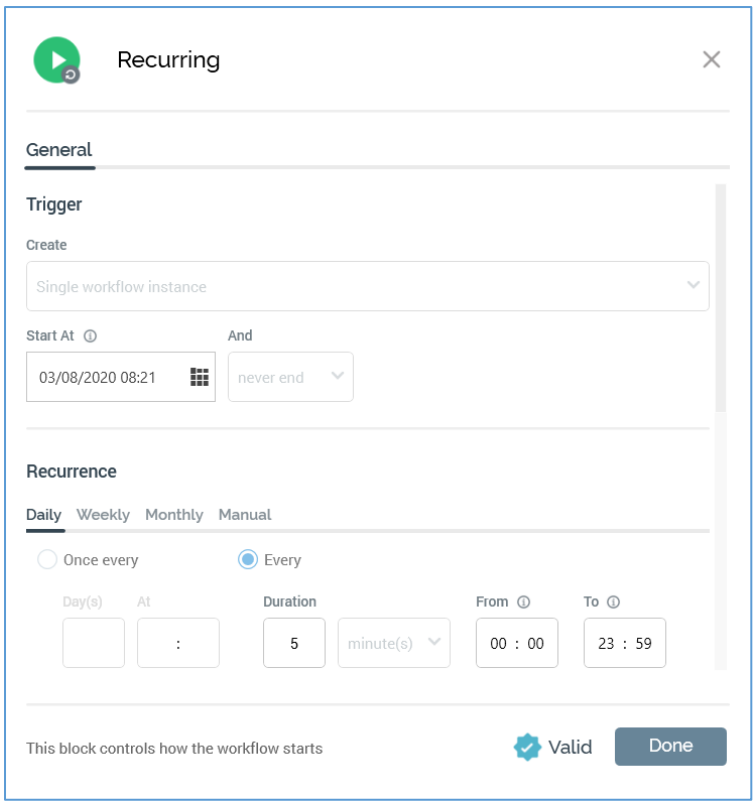
User story reference: 10433, 10434, 10436, 10437, 10438, 10439, 10440

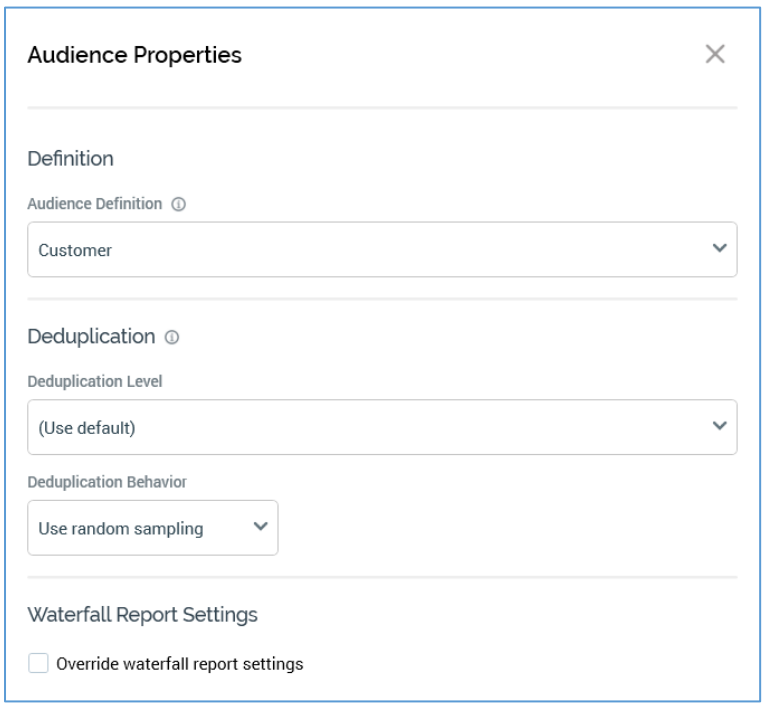
User Interface Updates

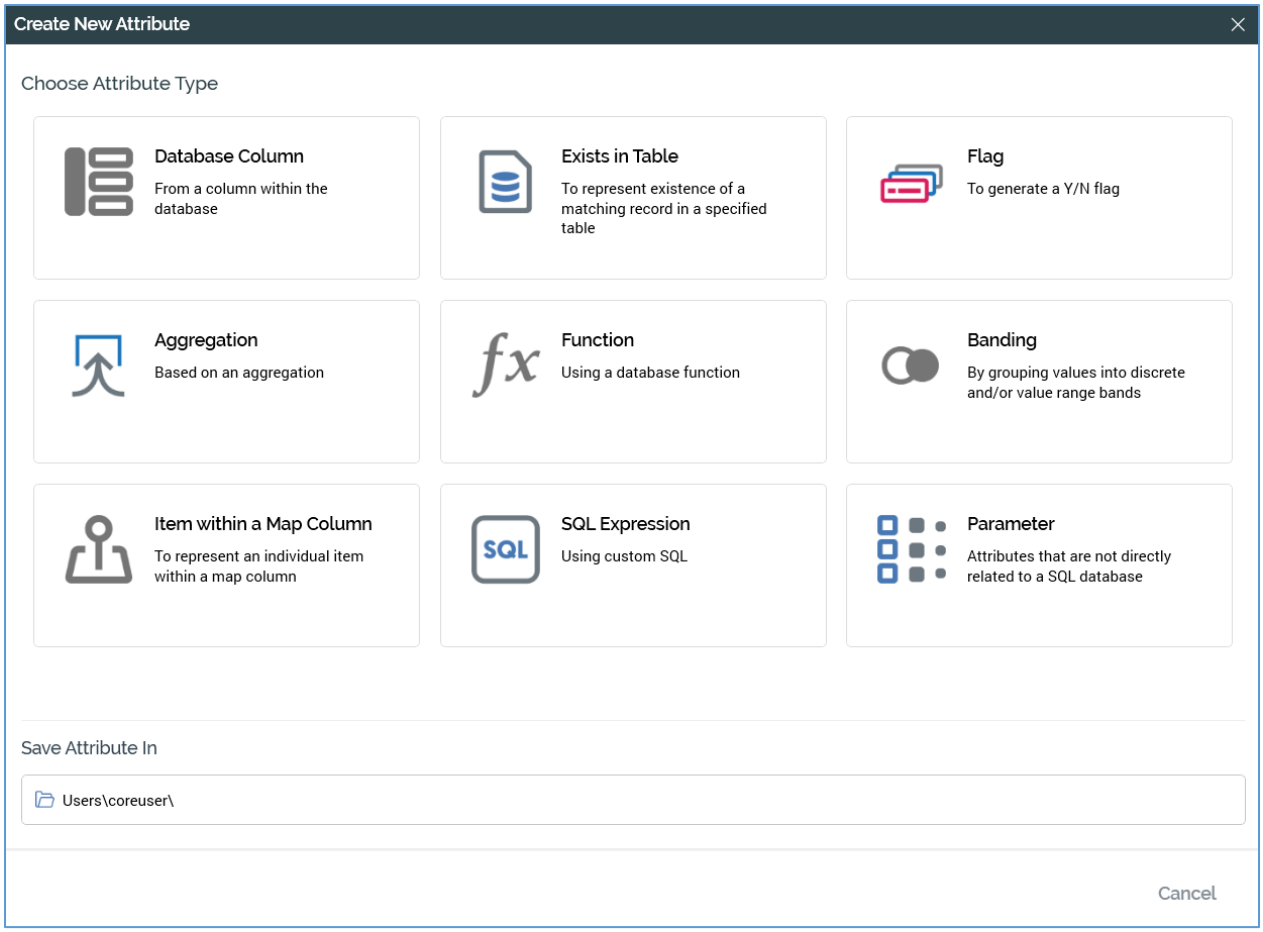
Elements across both the RPI Client and Server Workbench applications have been updated:

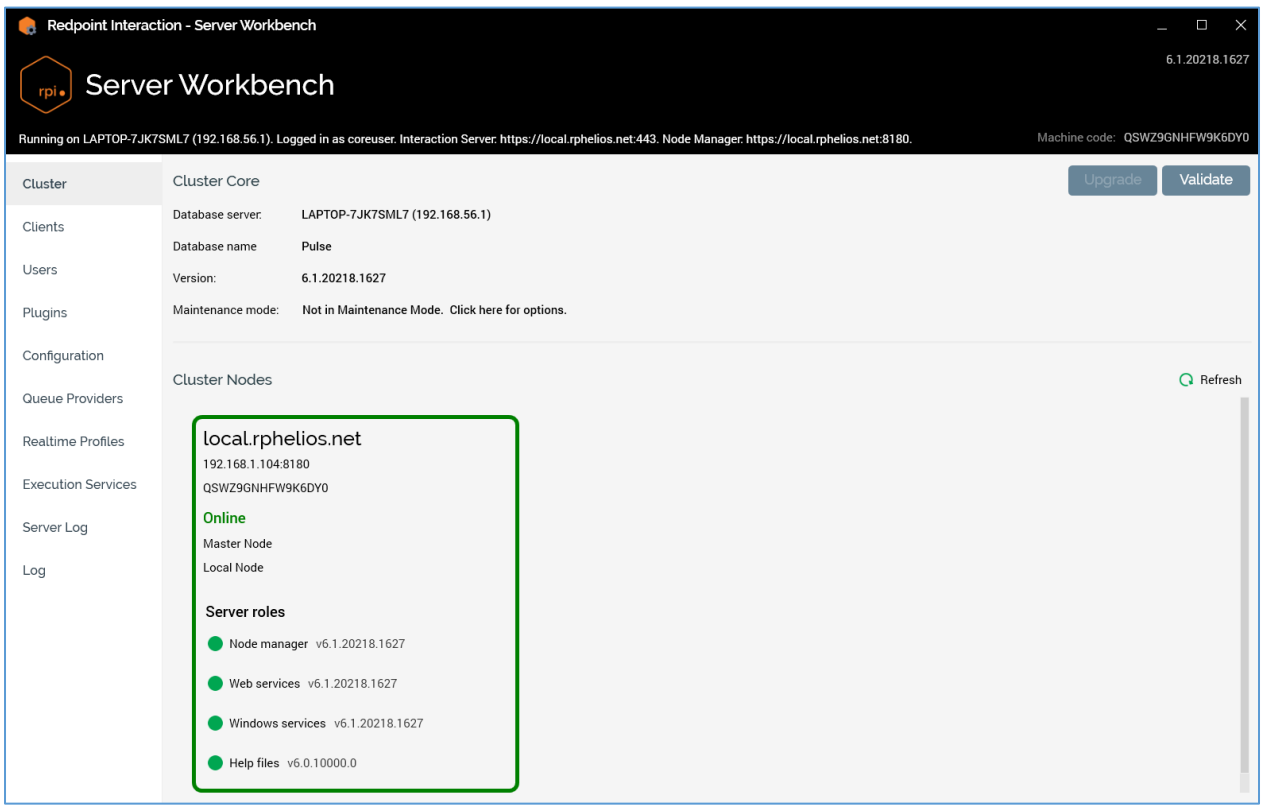





Recurring
General
Trigger
Create
Single workflow instance
Start At
And
03/08/2020 08:21
never end
Recurrence
Daily
Weekly
Monthly
Manual
Once every
Every
Day(s)
At
Duration
From
To
5
minute(s)
00 : 00
23 : 59
This block controls how the workflow starts
Valid
Done


Audience Properties
Definition
Audience Definition
Customer
Deduplication
Deduplication Level
(Use default)
Deduplication Behavior
Use random sampling
Waterfall Report Settings
Override waterfall report settings

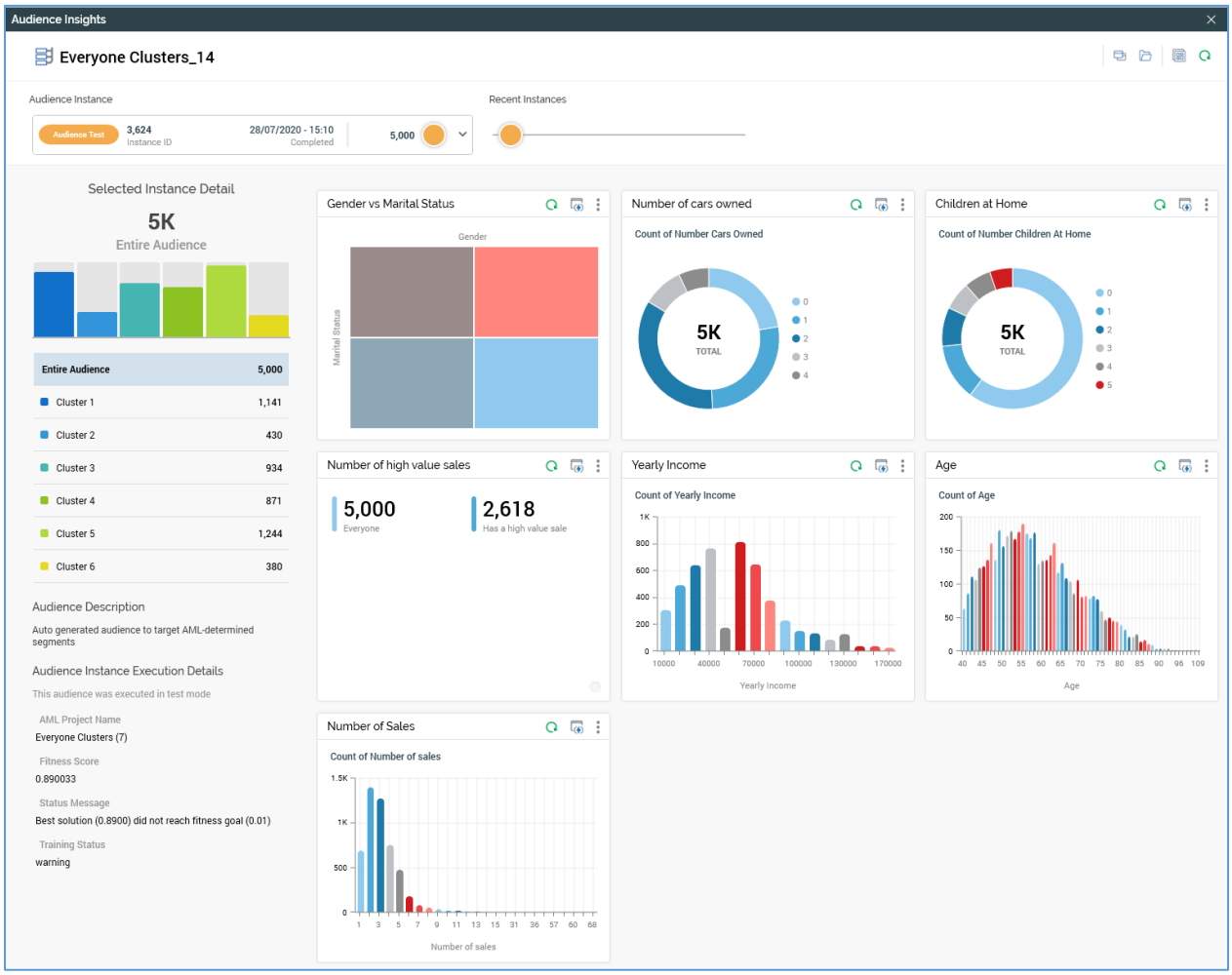




User story reference: 10695, 11361

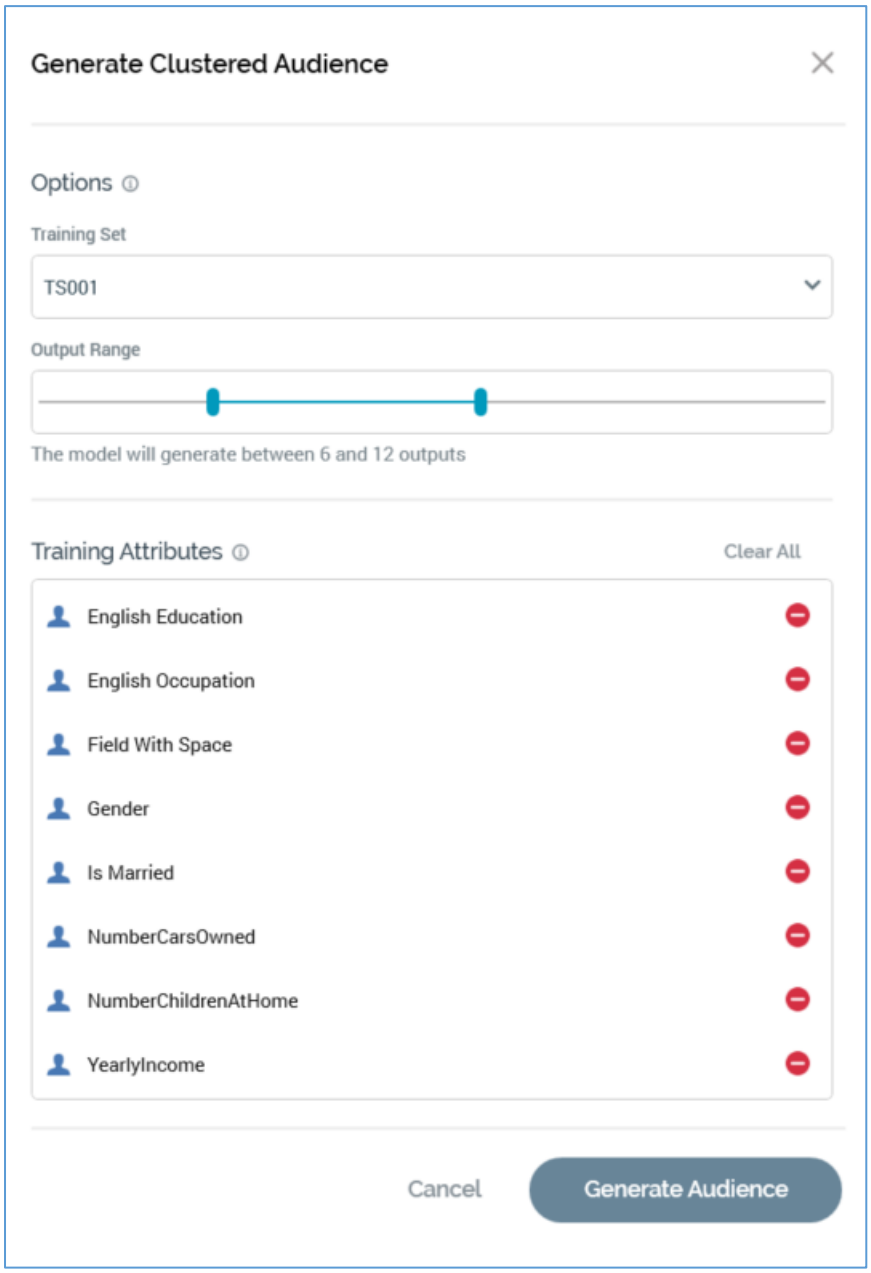
Clustered Audiences

The ability to generate a Clustered Audience from a standard selection rule has been added. RPI uses Redpoint Automated Machine Learning (AML) to analyze a set of data, targeted by a selection rule, to identify within the same a series of discrete clusters. The same clusters are then used as the basis for a new audience's outputs. The results of test execution of a newly-generated Clustered Audience are displayed for inspection within the Audience Insights Window.

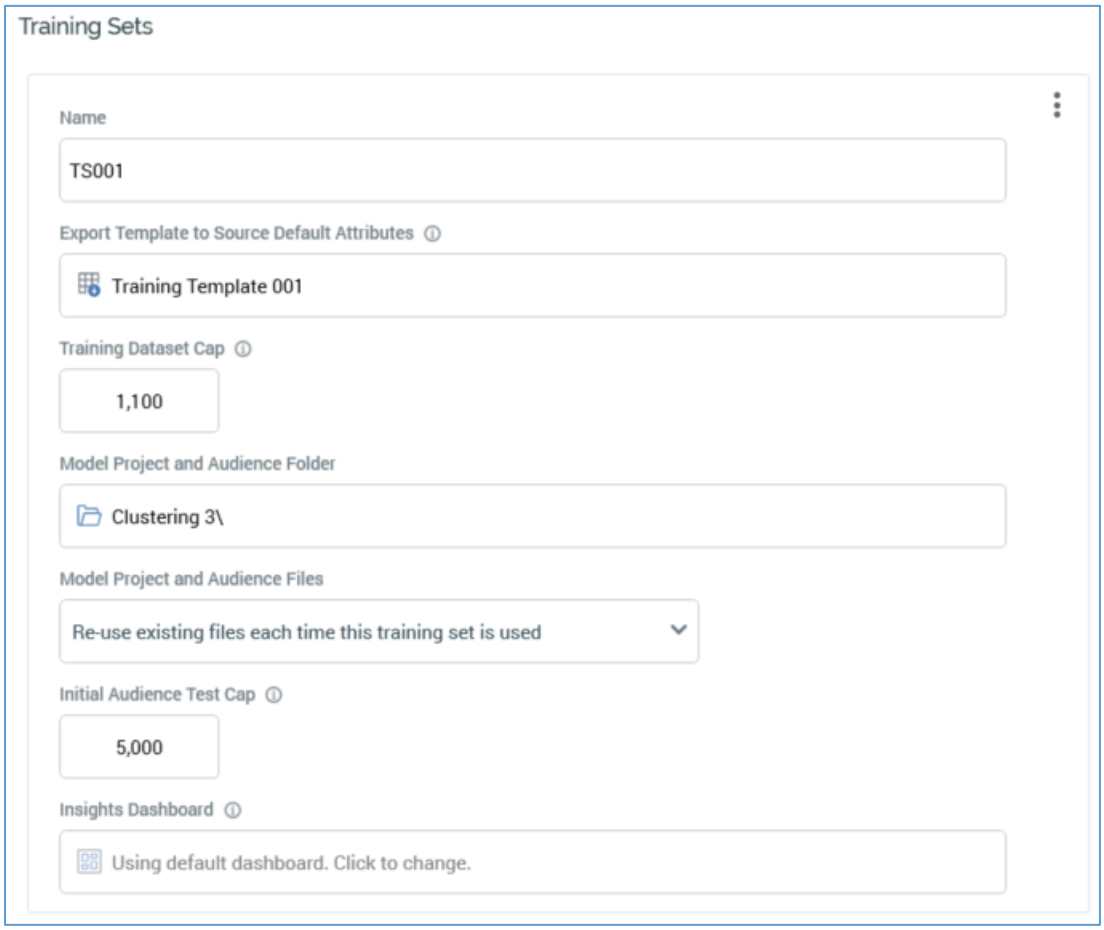


A Clustered Audience can then be used as required elsewhere in RPI.

A new interface supports the generation of Clustered Audiences:



A new tab within the Audience Definitions configuration interface supports the management of Training Sets, which define the default data set passed to AML to train the cluster model:

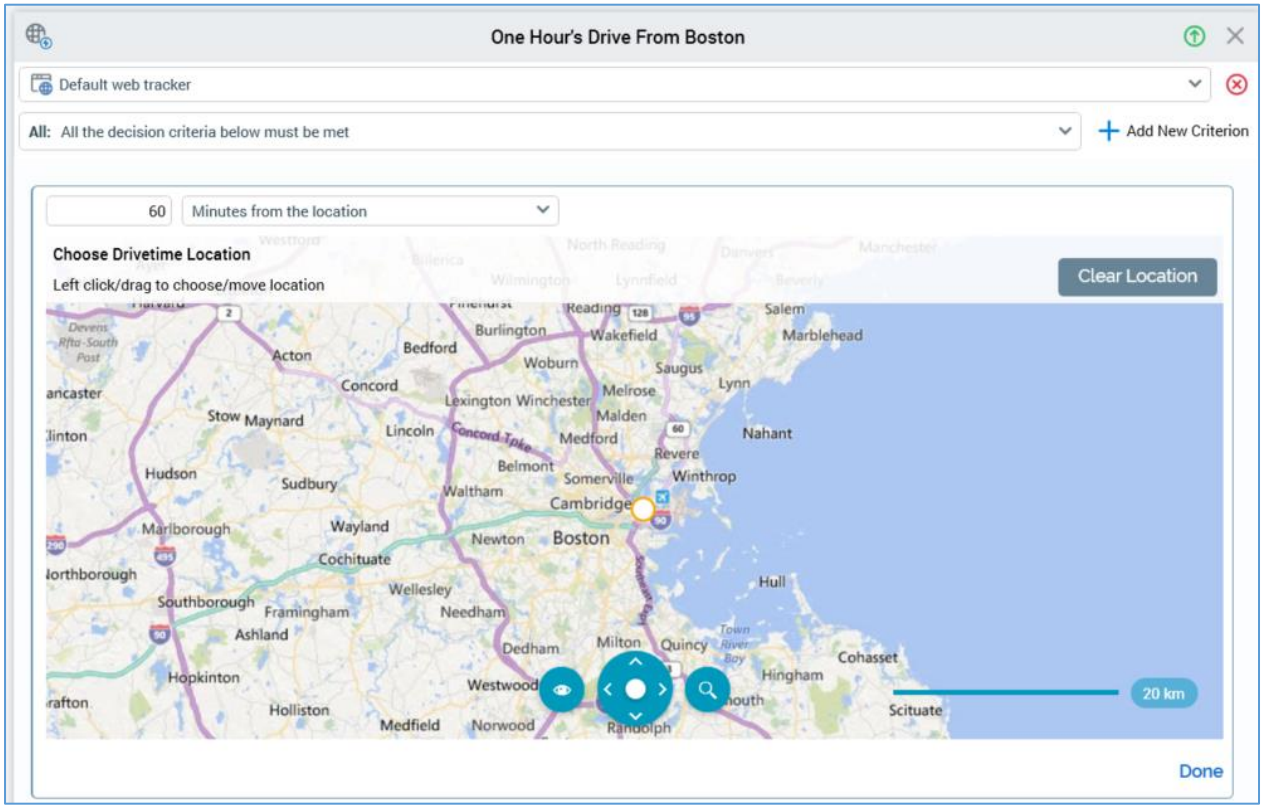


User story reference: 8841, 10938

Geolocation Enhancements

The following enhancements build on RPI Realtime's existing Geolocation capabilities:

- The Web realtime decision's Drivetime Geolocation criterion has been enhanced to make use of a map:

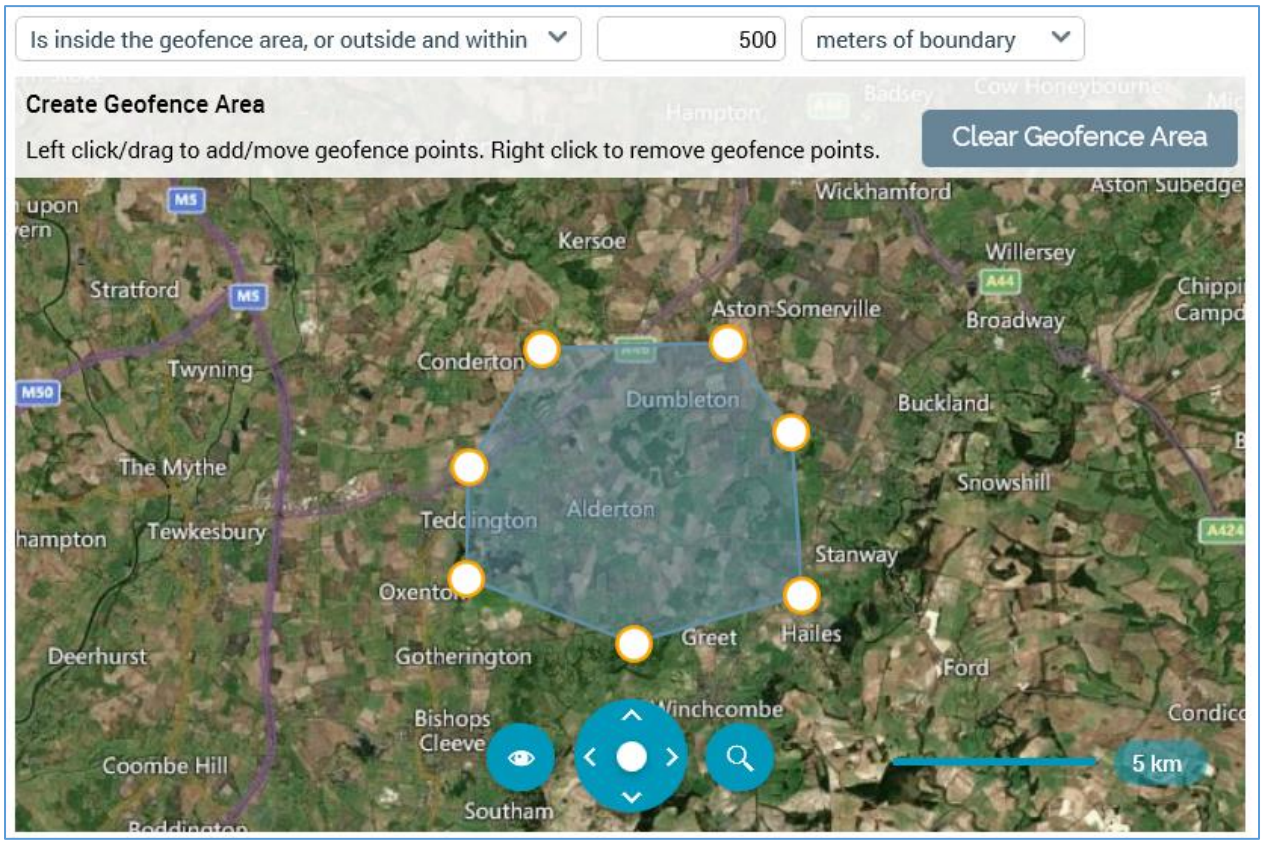


  These allow for the making of realtime decisions based on the proximity (distance or time) of a visitor to a specified location.

  User story reference: 9888

- RPI Realtime now supports the utilization of Geolocation providers through a plugin architecture (user story reference: 10515).

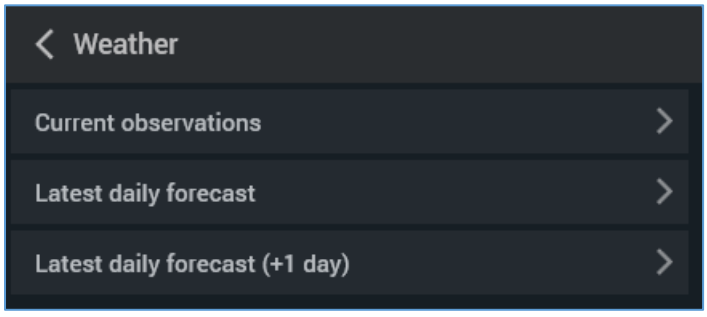
- A new Geofence Geolocation criterion has been introduced at the Web realtime decision:



The criterion facilitates the drawing, on a map, of a Geofence area. Realtime decisions can then be made on the basis of a visitor's interaction with the Geofence – e.g. is within, is outside and within a specified distance of, etc..

User story reference: 10655

- New Weather Geolocation criteria have been introduced at the Web realtime decision:



These provide for the making of realtime decisions on the basis of current weather observations or forecast weather predictions.

User story reference: 10656

- A new SearchString parameter can be passed when making a call to an RPI Realtime Decision endpoint that uses Geolocation realtime decisions. This provides for the identification of a location using free text – e.g. ZIP or postal code (user story reference: 10657).

- A new Country Code Geolocation criterion has been introduced at the Web realtime decision (user story reference: 10658).

- Existing Geolocation criteria types now support the use of Azure to provide location data. This complements the existing usage of Bing for the same purpose (user story reference: 10659).

- Changes have been made to the manner in which RPI Realtime's Geolocation capabilities are configured, at both cluster Configuration settings in Sever Workbench and in the appsettings file (user story reference: 10660).

3 Plugins

Email Service Providers (ESPs)

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

SendGrid Enhancements

Support has been added for the following in the context of RPI's SendGrid ESP plugin:

- List-unsubscribe support (user story reference 9725).
- Custom header support (user story reference 9912).
- Changes to the suppression of bounced email sends (user story reference 10073).
- Replacement of Segment Tag functionality with utilization of batching based on unique sets of content (user story reference 10507).
- Enhancements to the SendGrid Callback Service (user story reference 10738).
- The addition of new SendGridEvents table fields (user story reference 11829).

Cheetah Digital Enhancements

Support has been added for the following in the context of RPI's Cheetah Digital ESP plugin:

- When performing a test email send using Cheetah Digital, the ability to automatically switch the API to be used according to the offer's purpose (Marketing vs. Operational) (user story reference 9565).
- Replacement of the channel's Sender Profile property with Email Address (user story reference 10272).
- Increasing the channel's Max Batch Send Size property's maximum permissible value to 2,147,483,500 (user story reference 11675).

Database Providers

SQL Server

Support has been added for the following in the context of RPI's SQL Server plugin:

- Exposure of a new configuration setting to control usage of SELECT COUNT vs. SELECT COUNT_BIG (user story reference: 11406).

Azure SQL Database

Support has been added for the following in the context of RPI's Azure SQL Database plugin:

- Azure Managed Identity Support (user story reference: 10887).
- Use of SELECT COUNT_BIG (see above) (user story reference: 11421).
- Use of ColumnStore indexes in temporary tables (user story reference: 11792).
- Use of an identity column when generating a unique temporary table IDs (user story reference: 11793).
- Use of SELECT INTO as an alternative to UPDATE FROM (user story reference: 11794).

Azure SQL Data Warehouse (aka Azure Synapse Analytics)

Support has been added for the following in the context of RPI's Azure SQL DW plugin:

- Rename of the Azure SQL DW database platform to Azure Synapse Analytics (user story reference: 10268).

Oracle

Support has been added for the usage of a SqlNet.ora configuration file.

User story reference: 9412

Social Providers

Facebook Enhancements

- Dynamic custom audience names (user story reference: 9884).
- Updates to ensure compatibility with v7.0 of the Facebook REST API (user story reference: 11021).
- Configuration of the location where Facebook Custom Audience export files are to be written (user story reference: 11634).
- Changes to support Facebook channel utilization within RPI without requiring internet access from a user's client machine (user story reference: 11712).

Twitter Enhancements

- Image support at Twitter and Twitter Direct channels (user story reference: 9834).
- Twitter Tailored Audiences (user story reference: 10094).

External Content Providers (ECPs)

Contentful

Support for the Contentful ECP has been added.

User story reference: 9608

4 Other New Features

The following features are also introduced in RPI v6.1:

Channel Enhancements

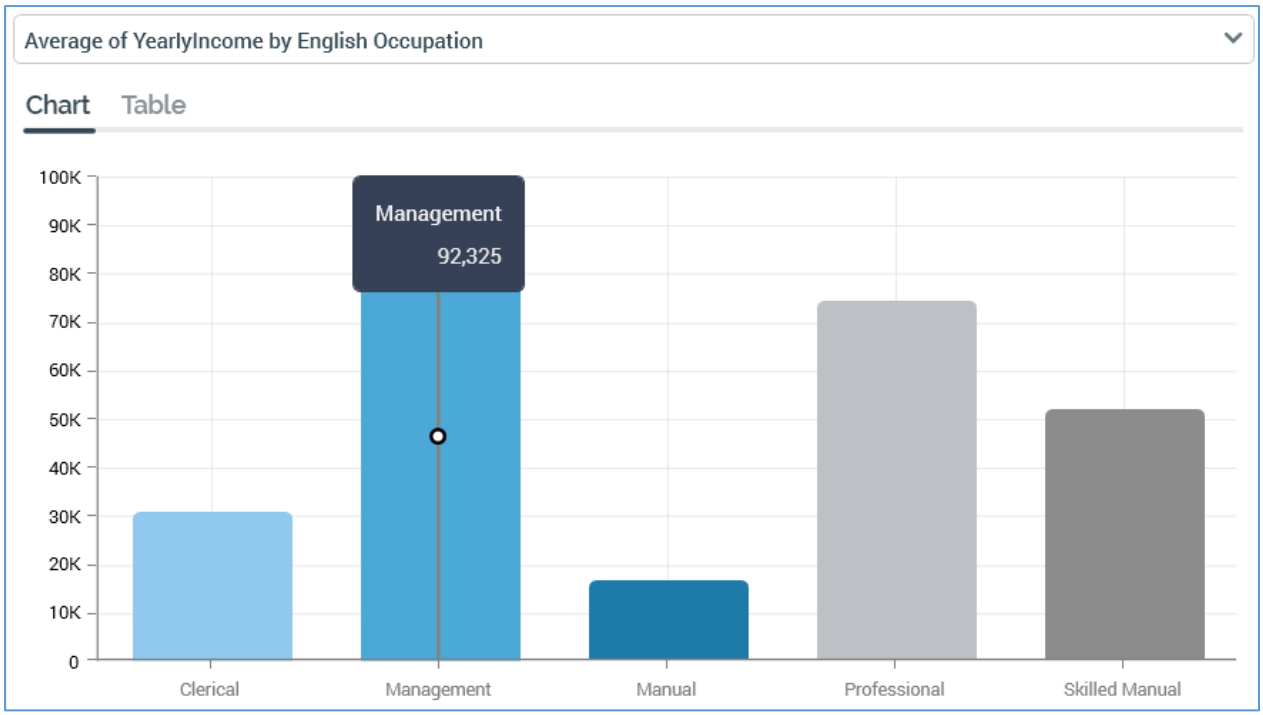
The following enhancements to Interaction Designer functionality have been added in v6.1:

- Enabling of trace logging at non-ESP channel providers (user story reference: 10902).
- Exposure of hard-coded settings at channels' configuration interfaces (user story reference: 10903).
- A configurable limit to control the number of channels that can be created at an RPI client (user story reference: 9887).
- Specification of how a channel's Post-execution Service call is to handle errors (user story reference: 5031).
- Consistent handling of special characters across email channels (user story reference: 10364).
- Introduction of API call retries across all channel providers (user story reference: 11111).

Rule Designer Enhancements

The following enhancements to Interaction Designer functionality have been added in v6.1:

- The Orchestration realtime decision's Smart Asset Result (formerly Content) criteria have been enhanced to support the use of Impression Counts when making realtime decisions (user story reference: 8825).
- New Event Metadata criteria at the Web Tracking realtime decision (user story reference: 8849).
- Support for Waterfall Counts at basic selection rules (user story reference: 9584).
- Use of a new charting control at the Chart analysis panel, bringing it inline with the Chart Widget:



User story reference: 10413

- Support for the use of Placeholders at the basic selection rule (user story reference: 10460).
- Introduction of new Message History criteria at the Orchestration realtime decision, which allow for the making of realtime decisions on the basis of previous receipt of Advanced Smart Asset messages (user story reference: 10603).
- Automatic display of previously-calculated results when opening a selection rule or analysis panel (user story reference: 10934).
- Exposure of Aggregate Filter Overrides at basic selection rules (user story reference: 11473).

Interaction Designer Enhancements

The following enhancements to Interaction Designer functionality have been added in v6.1:

- Writing of Metadata to Offer History Meta at execution of a queue activity (user story reference: 706).
- Firing of a Recurring Trigger on an ad hoc basis (user story reference: 6590).
- Changes have been made to a Recurring Trigger that facilitate definition of the action to be taken when an hourly trigger is unable to fire (user story reference: 7744).
- New Minimum and Maximum Batch Limit properties have been exposed at the Batch Audience (user story reference: 10072).
- The ability to define a Qualification Rule has been added at the Queue Activity. This allows for the application of eligibility conditions to determine the audience to which an incoming queue message applies (user story reference: 10430).
- The Queue Listener has been enhanced to support responding to Realtime Events (such as a link click or a shopping cart update) (user story reference: 10431).

RPI Realtime Enhancements

The following enhancements to RPI Realtime functionality have been added in v6.1:

- A new Visitor Backup cache setting is now supported. This facilitates the writing of visitor profile data to a parallel persistent cache. This can be used to rehydrate the main cache in the event of visitor profile expiry therein (user story reference: 8844, 8845).
- Visitor Parameter and DB Values profile information is now stored in a flattened format, making that data easier to access in an auxiliary database capacity (user story reference: 8846).
- A new configuration setting allows for the persistence of submitted web form data in data warehouse table RPI_WebFormFieldSubmission (as stet), or as JSON in table RPI_WebFormSubmission (user story reference: 8847).
- New Recent Items and Shopping Cart Realtime plugins have been made available. These provide the basis for a client's custom implementation of the same (user story reference: 8848).
- A new Realtime Configuration endpoint has been made available. This exposes a series of methods, each of which returns upon invocation a specific section of the current RPI Realtime installation's appsettings file (user story reference: 10513).
- Server-side Cookie support (user story reference: 10516).

Follow File

The ability to Follow a file has been added. When a file has been followed, an email notification is sent to the follower on the event of another user undertakes an action on the file (e.g. starting an interaction workflow, publishing a smart asset, or deleting the file). A new Preferences interface provides visibility of all currently-followed files.

User story reference: 10064

Search File System by Subtype

The ability to search the RPI file system by file subtype has been added. This has been made available at both the File System Dialog and the Folder Search component.

User story reference: 10336

Reply-To Email Address

The ability to define a Reply-To email address at an email offer has been added. This property can be used by all RPI ESPs that support this feature.

User story reference: 8617

Read-only Data Warehouse Connection

It is now possible to configure, at a client within Server Workbench, a Read-Only Data Warehouse Connection String. This can be used to improve performance in a number of RPI contexts (e.g. getting a selection rule count or refreshing a chart).

User story reference: 11770

PII Data Visibility Restriction

RPI now supports the defining of a column, within the Catalog configuration interface, as PII data. When a column is defined as PII, its values cannot be viewed within RPI – e.g. when creating a compare to list criterion, using the Data Viewer, or refreshing a chart.

User story reference: 10347

Automatic Band Generation at Cluster Model Project

When creating a model project based on an AML cluster model, RPI will automatically generate model score bands based on the discrete values exposed by the model

User story reference: 10813

Azure KeyVault Support

Support has been added for Azure KeyVault, which leverages a secure external mechanism to persist RPI password data when RPI is installed in a Microsoft Azure environment.

User story reference: 10512, 10602

Clone User Groups

The ability to clone a user group has been added.

User story reference: 9346

Create New Export Template at Data Viewer

The ability to initiate the creation of a new export template has been added at the Data Viewer.

User story reference: 10552

Disable/Enable Node

It is now possible, in Server Workbench, to disable and enable a node in an RPI cluster.

User story reference: 11127

5 Upgrade Considerations

The following should be borne in mind when upgrading to RPI v6.1:

- A warning will be provided at upgrade to v6.1 if an RPI client's file system contains one or more Outbound Message Lists (file type now deprecated). If use is being made of outbound message lists, please discuss upgrade paths with Redpoint Professional Services.
- Direct upgrades to RPI v6.1 are only supported from v5.0 onwards.