

**Unica Plan
V12.0 Release Notes**



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Chapter 1. Release Notes

Contains information about new features, defect fixes, and known issues that HCL releases as part of a scheduled software release.

System requirements and compatibility

Unica Plan operates as part of the Unica suite of products.

- Unica Plan version 12.0 requires Unica Platform 12.0.
- For reporting, Unica Plan 12.0 uses the 12.0 version of the Unica Plan and the Unica Plan/Unica Campaign reports packages.

For installation instructions, see the Unica Plan Installation Guide.

If you have a previous version of Unica Plan see the Unica Plan Upgrade Guide for upgrade instructions and supported versions for the upgrade process.

New features and changes in version 12.0

Unica Plan 12.0 includes the following new features.

For more information about the new features and changes in Unica Plan 12.0, see the Unica Plan documentation set.

JBoss and Tomcat support

- You can deploy the Unica Plan application from a WAR file or an EAR file on the JBoss Application Server (JAS).
- You can deploy the Unica Plan application from a WAR file on the Tomcat Application Server (TAS). Deploying an EAR file is not supported on the Tomcat Application Server (TAS).

MariaDB support

MariaDB 10.4.x database is supported for system tables.

Copying projects - high flexibility with many options

In version 11.1, we provided higher flexibility while copying a project. During a project copy, users could choose to copy from the project or from a template or customize copy people, attachments, workflow, budget, and approvals. In addition to this capability, users can now select the custom tab they want to copy or get from the template. For details, see the Unica Plan User's Guide > Projects > Copying projects section.

Rich Text attributes in forms

You can now customize your form by adding rich text attributes. Users can enter Rich Text such as "Bold", "Italics", different colors, highlighting and different fonts. Users can also add tables, images link and copy or paste from Word or Excel. These enhanced capabilities make the form much easier to follow and fill out the appropriate sections more quickly.

Out-of-the box reports with BIRT

All out-of-the-box reports are available via BIRT , which is built into Plan, and hence no need for installing and maintaining additional software. For more details, see the Reports section in Unica Plan User Guide.

Fixed defects

The following defects are fixed in Unica Plan version 12.0.

Defects corrected in version 12.0.

Issue Id	Description
HMA-289455	After assigning a task to a team member, when you try to delete the assignment under project workflow spreadsheet, an error message is

	displayed and after closing this message the task member assignment is not retained.
HMA-298708	The first offer in any new folder does not show up while assigning that offer in TCS when you browse for the offer
HMA-294551	In Form editor, the Date Select attribute type no longer displays Attribute Type .
HMA-294047	Form attributes type displays "text area" instead of" Text - Multi Line" and "text field" displays instead of "Text - Single Line".
HMA-288059	When printing project, some project information is truncated.
HMA-294767	Form attribute rules do not work properly after changing the name of a form.
HMA-284415	Saving user Preference throws error in tcs tab.
HMA-297698	In project request wizard, if the summary tab has a form with multi-select object reference attribute, when you edit this attribute the recipient information gets deleted.
HMA-303861	Memory increases while attaching the excel file in project and can lead to out of memory.
HMA-294895	Using Plan, one can access the password file from RHEL environment by performing some modification in the link.
HMA-293354	Forecast or Actual Duration is not reflected in expected duration.
HMA-304920	The select button for adding a Business Area in creating Plan wizard is hard to see due to the graphical button and the shadowing behind the button.
HMA-304924	Markup buttons are not visible on IE11
HMA-284067	The "Request a Project" popup message for selecting templates is too small to show all content.

HMA-294700	VERSION - updateAttributes API issue -- seems to generate a foreign key constraint on uap_mo_hist2 during "InsertRevisionHistory" call
HMA-293977	appendGridRow API generates a foreign key constraint on uap_mo_hist2 during "InsertRevisionHistory" call
HMA-293853	"Approvals awaiting action" portlet is "blank" on dashboard.
HMA-294020	Version - Problem in a Plan search screen with a certain keyword.
HMA-293999	The Rest API createOffer fails, if an uapParentFolderId is specified.
HMA-293997	VERSION - Issue with Scheduled invoice rollup's
HMA-294557	Error when calling findFinancialAccountByNumber API with non numerical account Id.
HMA-295090, HMA-294862	5000 error when opening a project tab in edit mode and the form name contains character '&'. Characters & , ' + and . are now forbidden in a form name.
HMA-294049	Planning Tab is not visible after clicking History tab of Campaign.
HMA-298965	5000: An unexpected error has occurred when disabling values through manage link for a form when lookup table is used in a grid attribute and in a form attribute.
HMA-291133	Cannot expand budget rule to view criteria without editing.
HMA-284883	Folder name is distorted under template section
HMA-294127	Plan Offer UI distorted for Offer Suppression Rules with German locale.
HMA-289698	An error occurs while deleting flowchart approval is not displayed for Plan User.
HMA-289761	'null' is displayed in comments when existing flow chart approval in draft state is edited.
HMA-289749	The message which is displayed when flowchart attached to approval is deleted is confusing.

HMA-294325	Publishing multiple offers to Campaign ends in an error.
HMA-289705	5000 error on URL Markup with SAML authentication.
HMA-294129	5000 error on changing Flowchart Approval status on clustered setup.
HMA-294419	Connection Leak Found in create project with validateAllWizardSteps set to true.
HMA-294562	Nullpointer exceptions in log on copying form with grid attribute on setting up with MariaDB as a database,
HMA-295456	Cross-Site Scripting issue on description column while creating plan,program, team.
HMA-294556	Message displayed for text field length in misleading while creating form.
HMA-294554	Form rules are not working in program instance.
HMA-287761	User selection is not working with clone project option.
HMA-305916	Approval Item - 5000 error on URL Markup.
HMA-290009	System does not delete role even if all its references are removed.
HMA-286270	Adobe Mark up results in duplicate comments when clicking View/ Add / Markup.
HMA-304967	After adding an attachment as an item to approve in a approval, is displayed below the attachment name.
HMA-294311	Users are able to add a Flowchart Approval on a non Campaign project.
HMA-294312	Duplicate Tool Tip for Flowchart Approval appears in disabled mode.
HMA-293745	Problem with Custom Triggers - com.unica.uap.triigger.TriggerExecutionException: Trigger failed due to errors in procedure: Commitment Grid Event.
HMA-294558	Flowchart Approval Task can not be opened with LDAP user.
HMA-294555	5000 error while approving the workflow approval with concurrent users.

HMA-294560	Budgets : Not able to compare budget versions.
HMA-293742	5000 error when posting feedback in an approval task when multiple attachments exists.
HMA-286353	The "Save changes" and "Cancel" buttons on Out-Of-Office page are not translated in French locale.
HMA-304921	In Plan creation wizard, when scrolling through the list of already selected members, the scroll bar launches the Add Team Members pop up window despite only clicking the scroll bar.

Known issues

This table contains known issues in Unica Plan version 12.0.

Issue	Issue ID	Description
Forms : The Single select attribute does not display the form as expected with URL attributes included in form rules.	HMA-283675	When URL value is used in a single select attribute value, all attribute values display.
Delegation does not take place, if the team member assigns tasks to himself.	HMA-283523	When an OOO user tries to assign the task to himself, delegation fails.
The dependent task numbers are displayed twice in the alerts.	HMA-283450	When task is delegated, alert is triggered and dependent task is displayed twice.
Analysis tab does not get updated when delegated user is already approver of standalone approval	HMA-283160	Analysis tab does not get updated when the delegated user is already the approver of standalone approval.
Form Attribute selection is not highlighting the attribute	HMA-283029	When user tries to edit a grid attribute using IE11, the attribute is not highlighted as per the selection.

Too many errors occur while assigning team task to member	HMA-283013	When a task is assigned to team and user tries to delegate it using the option under project list page, then same error is displayed multiple times.
Copying and cloning the projects - must delegate for the independent tasks which are in ready to start state.	HMA-282791	Copying and cloning the projects - must delegate for the independent tasks which are in ready to start state.
Detailed alert is not displayed, if task is marked as completed	HMA-282471	When "Detailed workflow change notification" is checked in the Alerts subscription window and user tries to update the status, detailed alert is not displayed.
Approver status does not go into 'Waiting' state if delegation fails	HMA-282129	When a delegation fails for a standalone approval, analysis tab is not updated.
The Projects menus are not seen in the Plan application user interface.	Defect 270652	When the user clicks "Clone this item" and "Clone this project", the Projects menus cannot be seen in the Plan application user interface and a pop-up window opens.
After upgrading the Required field in the form rule is reset.	Defect 272141	<p>If you use the required attributes feature in versions before 10.1 and have upgraded to version 12.0, the rules for required features are not retained in version 12.0. To make an attribute required, you must edit the attribute and select the Required option for the attribute. However, this makes the attribute a required attribute on all the forms that it is included in.</p> <p>This issue does not occur if you upgrade from version 10.1 or newer version.</p>

Error occurs when performing certain actions on setup integrated with Tivoli AccessManager.	N/A	When integrated with Tivoli Access Manager, under select circumstances, an "Incomplete Reply from server" error might occur when performing certain actions in the application (for example, configuring form attributes).
REST API support is not available for all APIs in V12.	N/A	REST API support is not available for all APIs. To see supported APIs in V12, see the Unica Plan REST APIs documentation.
NOT EXISTS produces duplicate results in DB2® v10.1.	N/A	<p>The systems that use DB2 v10.1, the NOT EXISTS operator produces duplicate results. Results can be incorrect for queries that include a NOT EXISTS clause.</p> <p>As a workaround, you can set the <code>DB2_ANTIJOIN</code> registry parameter to NO and restart the DB2 server. Forexample,</p> <pre><DB2-HOME>\BIN>db2set DB2_ANTIJOIN=NO</pre>
Error generated on Return to Previous Page.	1054	An error occurs when a user with no security permissions clicks "Return to Previous Page" on the Dashboard.
An error occurs in the fill-down feature of the workflow, if user selects localized user or team.	71853	In some non-English locales, on the Workflow page, the cell fill-down feature does not save values if the users or teams have special characters in their names. The special characters include: "^", "%," and "&."
When the zoom feature of the Calendar object is used, the view does not show the current Quarter and Month values.	91722	On the Calendar object, when a user zooms from the weekly view to a more granular timeline option, the correct span of weeks is not displayed. In a quarterly view, Quarter 1 is displayed on screen instead of the current

		quarter. In Monthly view, January is displayed for the Monthly view instead of the current month.
Process flow chart layout issue in workflow designer and project workflow.	163452	The process flow chart layout does not render correctly in Internet Explorer 10.
An approval with dependencies enforced can be canceled, even if its dependent task is not yet finished.	163730	The user receives an error and is not able to cancel the approval, until the dependent task is finished.
Columns moved to Selected columns still display in Available Columns .	163736	After the user adds columns to Selected columns , the columns must not appear in Available Columns .
Plan does not provide the information regarding the effect of deactivation to the project or request.	166376	Plan must include information or confirmation about what deactivation means to a project or request.
Rich text toolbar tooltips are not correct.	HMA-305383	In assets and invoices, rich text toolbar tooltips are in English for user with chinese language configured.
Rich text - Issues when manipulating cells in a Rich Text attribute on Internet Explorer 11	HMA-303714	<p>When the rich text is at screen bottom and users need to scroll down the screen to reach it, use of tools of Rich Text makes the scroll to back to the top of the screen.</p> <p>When the rich text field has a scrollbar and a table is inserted at the bottom of this field, the user needs to scroll the field to see the contextual menu of table when they selects a cell.</p>

Rich text - Internal border disappear in Internet Explorer 11	HMA-305491	IE11 - Internal table borders disappear when a same background color is added to multiple cells.
Rich text - Long list with number prefix requires enough left space	HMA-297477	Long list with number prefix requires enough left space for the number to be displayed and the text list to be aligned.
Rich text - Bulk formatting of the content of table cells is not possible	HMA-305492	There is no bulk formatting of the content of the table cells. The selection of several cells is to use to format the table cells appearance, not its content
Rich text - Contextual tool menu of table overlaps	HMA-305693	Contextual tool menu of table overlaps the rich text toolbar if the table is placed at the top of the rich text field.
Rich text - Export of the project exports the whole content of the rich text , including the format tags	HMA-296385	The export of project exports the content of the fields which results in the format tags getting applied to the raw data of the rich text field.
Automatic Datasource creation fails for UnicaPlatformDS -Linux/AIX	HMA-305850	<p>Automatic Datasource creation fails for UnicaPlatformDS -Linux/AIX.</p> <p>The datasource must be created manually by using:</p> <ul style="list-style-type: none"> • Creating the deployment xml - plan.xml manually for tomcat deployment • Creating "planDS" - JNDI manually in the unica.xml. • Using the Unica Platform utility to encrypt tomcat password. • Updating the plan.xml file with the newly generated password.

<p>Web Application does not start application properly when java options-DUNICA_PLATFORM_CACHE_ENABLED=true</p>	<p>HMA-305445</p>	<p>Web Application does not start application properly when java options-DUNICA_PLATFORM_CACHE_ENABLED=true</p> <p>When the installer completes the installation, verify that the conf/plan_ehcache.xml file contains the attribute name="PlanEhCacheManager". If not, edit the file and add it. Example:</p> <pre><ehcache updateCheck="false" name="PlanEhCacheManager"></pre>
<p>During installation, uppercase database credentials cause errors</p>	<p>HMA-176872, HMA-176873</p>	<p>During installation, uppercase database credentials cause errors.</p> <p>Workaround: Enter database details for the host name and domain name in lower case characters.</p>
<p>A saved form is not editable in a Safari browser.</p>	<p>HMA-220089</p>	<p>A saved form is not editable in a Safari browser when users drag the attribute element on the form palate, and immediately after try to click any button.</p> <p>Workaround: After dragging the attribute element on form palate, if the user clicks somewhere else in form editor palate before they click any button, and then click Save and Exit, Save Changes, Preview, or Cancel, users can edit the form.</p>
<p>In a Safari browser, when you click Download Original in the markup window, it opens a blank tab window along with every download.</p>		<p>In a Safari browser, when you click Download Original in the markup window, the file is saved successfully on disk. However, it opens a blank tab window along with every download. This is a Safari browser issue.</p>

		To avoid this issue you can try to hold the Option key and click Download Original to download without opening new blank tab. You can also right click Download Original to open a context pop-up menu. Click Save Image As... to save the file to the desired location. It does not open a new tab.
DOC: JBOSS: Warning "Failed to define class	287668	DOC: JBOSS: Warning "Failed to define class <code>com.sun.jersey.api.json.JSONWithPadding</code> in Module <code>"deployment.Campaign.war:main"</code> The error is displayed on JBOSS console - though it does not have any impact.
The non-existing users get imported for approval rules for the attributes.	HMA-289745	While importing a workflow template or a project template, the non-existing users in the form rules are imported for the User type attributes.
Users are able to create and link flowchart approval on a MO_CAMP Integration off setup.	HMA-289433	When UMO_ Campaign integration is OFF on the setup, users can still create a flowchart approval and link it to an existing flowcharts.
For single select grid attribute, system discards values after saving when it has special characters.	HMA-290456	If project instance has form with grid attribute - single select type, system discards the values after saving, when grid attribute has some special characters.
Resource task load BIRT reports displays an exception when some project name contain the \$ character	HMA-305352	When you open resource task load BIRT report, select a project with name containing a \$ and click on filter throws an exception.

The Task on time analysis report for DB2 shows an hyperlink	HMA-305965	The reports shows an unexpected hyperlink. Hyperlinks are not supported and clicking this link gives an exception.
Project tasks BIRT report is not showing green background for positive variance.	HMA-306022	The green color is not indicated when variance is equal or greater than 0.
Project tasks report: project without members are not displayed	HMA-306023	This reports only shows tasks which are assigned to someone.
Resource task load report : Exception for selecting the null values for dates.	HMA-306045	Selecting null value for dates gives exception
Days late not showing as expected on Overdue milestone report on DB2	HMA-306165	The number of days late are coming in black color instead of red color.
The variance is not showed as expected on Program tasks & milestones for SQL Server	HMA-306179	The variance is coming as positive instead of negative.
"Programs tasks and milestones" and the "Project tasks" reports for DB2	HMA-306185, HMA-306209	These reports sometimes give an exception when run.

Known limitations

This table contains known limitations in Unica Plan version 12.0.

Issues	Issue ID	Description
Default input value is not recognized by installer for supported locale prompt.	HMA-282187	During installation in Linux, the user is prompted to enter a value to select locale. User can press Enter button to choose default option, but it does not work.

Acrobat DC support for Plan 12.0	Defect 283290	"Attach File" and Recorded Sound annotation types is not supported. (Acrobat SDK does not provide any API for that).
User interface issues occur when a user creates numerous Marketing objects from the Plan settings > Marketing object type settings menu.	Defects 267053, 267054, 267056	<p>When a user creates numerous Marketing objects from the Plan settings > Marketing object type settings menu, the following user interface issues occur:</p> <p>The menu objects do not fit in the browser window and the user cannot scroll to see or access all the menu items.</p> <p>The Save changes and Cancel buttons are not completely visible in the Add Marketing object type window.</p> <p>The Save changes and Cancel buttons are not completely visible in the Add Template window.</p>
The value for a single select attribute is not saved when the grid is saved.	Defect 267800	When a single select attribute is used in a grid, the value is not saved when the grid is saved if the Single select attribute value contains special characters
5000 error occurs on Oracle when form attribute string is too long.	175488	The Oracle database limits the form attribute string to 30characters. Exceeding this length causes a 5000 error.
Incorrect asset URLs	177613	Adding forms to asset templates can cause errors on URLs
Relevant products related to offers from Campaign are	Defect 62333	Campaign offers have a relevant products feature, Plan offers does not have this feature. Therefore,

not migrated over to Plan		relevant products are not migrated from Campaign to Plan.
Safari browser downloads data migration files directly to Downloads folder	DEF063699	When you perform a data migration import, while using Plan with the Safari browser, you are not prompted for a destination folder. Imported files are downloaded directly to the folder designated for downloads in Safari.
Users cannot add marketing objects in languages other than English.	DEF057079	Plan does not allow multibyte characters in the marketing object type name.
Unable to add forms or templates with non-English characters in the form name, form attribute name, or table name fields	DEF057100	Form and template fields with non-English characters cannot be saved.
The task pane allows users to edit the Summary tab even if the project is canceled or completed	DEF057121	If a project is cancelled or completed on the Summary tab while the task pane is open at the right side of the page, you can continue to edit project forms in the task pane, even though it is no longer active.
Default dates on the grid do not always localize correctly	DEF057605, DEF040170	The date selection control for grids is not localized for non-English locales, so the default value for a grid date attribute is not always populated for some non-English language locales (such as Japanese).
A reviewer who has not yet responded	DEF057650	If a reviewer has not responded to an approval in the "On Hold" state, then the task pane on the

cannot continue an "On Hold" Approval from right task pane		<p>right cannot be used to continue that approval. The Approve, Approve w/changes, and Deny buttons display for the approval in the task pane, but the Continue and Cancel buttons do not display. In contrast, an approver who has already responded to the approval can continue it from right pane.</p> <p>This scenario occurs because the buttons on the right pane are driven by the role of the user: Approver or Approval owner. If the approver and the owner are the same user, approver actions take precedence.</p>
Formulas for computing metrics must be in English	DEF057660	<p>When adding metrics to metrics templates, the user can specify them as Planned or Rollup. If the user enters a formula in the Computed by Formula field, the formula must be in English. An error results if a user enters a translated string instead of ROLLUP.</p>
Metrics formulas are not validated	DEF057726	<p>If an invalid formula is specified for a metric, an exception error results when Unica Plan finalizes values entered on the Tracking tab of an object instance that uses the metric. See the product documentation for information about valid operators and operands.</p>
Limitations in importing offer templates	DEF059793	<p>Offer templates are not imported in the following cases:</p> <ul style="list-style-type: none"> An offer template with the same ID exists. An offer template with the same ID was published and deleted. Any form with same name is used in an offer template.
Requirement for reason for denying	N/A	<p>When Unica Plan is configured to require a reason when users deny an approval, users must select a</p>

an approval feature cannot be disabled		value for the deny reason. After users begin to use this feature, the system cannot be re-configured to disable this feature
Plan single URL configuration does not support the analysis tab for plans and programs	Defect 172856	If the analysis tab for a plan and program object is configured as single URLs, after clicking these URLs the user interface does not display the tabs to navigate to other parts of the plan or program objects.
In Plan-Campaign integrated systems, the single URL feature has limited functionality	Defect 177309	For a single URL configured campaign project, the implementation tab is not visible. The single URL feature is not implemented for campaign tabs
Plan approvals on mobile IOS systems have layout problems	Defect 178600	The post-complete response button and file names are difficult to see on IOS devices.
AcquireLock API does not throw an exception even if a user has opened the people tab and other tabs in edit mode.	Defect 166474	When using the Unica Plan API, it is not possible to acquire a tab level lock on an object. The API only allows object level locking, whereas the GUI allows tab level locking.
Form creation, publishing, and usage does not work when DB2 owner and user different	Defect 19733	This issue occurs only when the user mentioned in the data source is not the one who has created the database tables

<p>Sorting of Projects- Under supporting Projects and requests On page 2 Try to sort any one column (say Last date) then the page refreshes and moves to page 1</p>	<p>Defect 801917</p>	<p>Sorting on Page 2 for the Supporting Projects and requests will refresh the page and navigate to the first page.</p>
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