

Unica Plan V12.1 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 12.1 requires Unica Platform 12.1.
- For reporting, Unica Plan 12.1 uses the 12.1 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 12.1

Unica Plan 12.1 includes the following new features.

For more information about the new features and changes in Unica Plan 12.1, see the Unica Plan documentation set.

New Workflow UI

A completely redesigned workflow with modern UI. The new workflow UI retains capabilities of previous versions, like copy-paste, date calculation, etc, and adds the following new capabilities:

- Drag-and-drop tasks, collapse stages, and resize and reorder columns.
- Editable tasks and approvals details within the spreadsheet and in a panel that opens when you click the task or approval.

- Based on the permissions you set, the workflow now opens directly in edit mode allowing quick changes. Any modification made in the spreadsheet is automatically saved. Any modification made in the task panel or approval panel, which is not saved, can be cancelled, if required.
- Several users can now work on same workflow at the same time. Any changes made by one user will be automatically refreshed on the other users' browsers.
- Similar to Classic Worklow UI, the timeline view, in the Enhanced Workflow UI, will be a read-only view.
- Process view, in the Enhanced Workflow UI, is not available in the 12.1 release.

New APIs for managing Workflows

A new set of REST APIs for creating and updating workflow tasks and approvals.

REST API Swagger UI

For users with Plan Administrator role, Swagger UI has been introduced, on the Plan Settings page, for exploring Unica Plan V1 and V2 REST APIs.

Saving user preferences in new workflow

From version 12.1.0.1, user can save column preferences in the new Workflow. For 12.1.0.1, user can hide columns or unhide columns and these settings will be saved upon exit. User cannot hide Task name and the following mandatory columns:

- Status
- % completed
- Required
- Task code

Fixed defects

The following defects are fixed in Unica Plan version 12.1.

Table 1. Defects corrected in version 12.1.

Issue Id	Description
HMA-312381	When you enabled SOAP markup (with Acrobat), versions of the PDF with markup, or without markup, could not be created when the approval was opened from the new workflow UI. This was a limitation in Unica Plan 12.1.0 and fixed in Unica Plan 12.1.0.1.
HMA-310321	When you created a customized copy for a project, without including task attachments, and later clicked the project attachment tab, a 5000 error used to appear.
HMA-308915	Dropdowns were not the same on the Unica Insights DetailExpenseBreak report.
HMA-308907	The REST API ExecuteProcedure allowed calls to a procedure (trigger). If the procedure returned some message, an error used to occur during the conversion of the result.
HMA-308385	A Form, which contained <code>line wrap view</code> type of grids, threw 5000 exceptions in the project.
HMA-307797	On the Unica Insights Detail expense breakdown report, the selected fiscal year was getting not displayed after generating the report.
HMA-307789	On the Unica Insights Approval & Compliance listing, Approval Process/ Progress was not getting updated correctly.
HMA-307788	On the Unica Insights Approval & Compliance listing, Duplicate approvers column name is displayed in the report.
HMA-307577	Grid API had performance issues post Unica version 10.
HMA-307544	There was discrepancy in behaviour between project creation in UI and project creation using REST API.
HMA-307409	Could not delete a team even if it was not used anywhere.

HMA-307343	On the Unica Insights Overdue milestone report, the date filter was not working with the equal end date.
HMA-307335	In the Grid column on Form Editor, if there were several grids, selecting a column did not highlight the cell correctly.
HMA-307256	On the Unica Insights Overdue milestone report, days late was displayed as zero.
HMA-306820	Project cloning was not working.
HMA-306270	In the Project attachments tab, if you added a markup on a URL, 5000 error used to appear.
HMA-305452	Could not access Plan when automatic data source option was selected for Apache Tomcat installation.
HMA-306024	On the Unica Insights Project Tasks report, 0 variance was not displayed for a few rows in a project, and there was a mismatch with IBM Congos data.
HMA-287461	CSRF error message showed invalid characters for German locale.

Known issues

This table contains known issues in Unica Plan version 12.1.

Issue	Issue ID	Description
Text appears in English language even after changing the locale	HMA-313446	<p>In the Internal Review screen, the following labels appear in the English language even after changing the locale:</p> <ul style="list-style-type: none"> • Create version • with markup • without markup

Error displayed in logs	HMA-307699	<p>An error <code>ERROR - Unexpected Fatal Error in Class: com.unica.install.ia.custom.BirtDbTool.install()</code> is seen in the logs.</p> <p>Workaround: After copying the reports on the Insights server, run the insightsDBTool to update database credentials.</p>
The vendor name dropdown goes off the widget.	HMA-312237	When creating or editing an invoice, the vendor drop down is larger than its container. It does not prevent selecting a Vendor.
If you give long comments for approver attachments, tool tip does not display complete comments.	HMA-312235	On the enhanced workflow UI, when you add a long comment to an attachment, in the list view, the tool tip does not display the complete comment.
Stage name in new workflow missing '.' after the stage number.	HMA-310965	On the enhanced workflow UI, the number that precedes the name of the stage is missing a dot. For example, it is showing « 1 Stage » instead of « 1. Stage »
If you give long comments for approver Instructions, tool tip does not display	HMA-309868	On the enhanced workflow UI, when you add a long comment, to instructions of an approver, the tool tip does not display the complete comment.

complete comments.		
If you give long comments for approval response section, tool tip does not display complete comments.	HMA-309865	On the enhanced workflow UI, when you add a long comment, to the approver response section in the responder history, the tool tip does not display the complete comment.
Reviewer Role appears after adding Member for Approval workflow spreadsheet.	HMA-309789	On the enhanced workflow UI, if you add a Member for approval using the spreadsheet view, it shows the selected roles in the Reviewer Role column for this approval.
In the new UI, user cannot move stages up and down.	HMA-307200	On the enhanced workflow UI, you cannot move stages using drag-and-drop.
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.
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	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.

		As a workaround, you can set the <code>DB2_ANTIJOIN</code> registry parameter to <code>NO</code> and restart the DB2 server. Forexample, <code><DB2-HOME>\BIN>db2set DB2_ANTIJOIN=NO</code>
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.
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.
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	HMA-303714	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. When the rich text field has a scrollbar and a table is inserted at the bottom of this field, the user needs to

Internet Explorer 11		scroll the field to see the contextual menu of table when they selects a cell.
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.

<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> <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.</p>
<p>DOC: JBOSS: Warning "Failed to define class</p>	<p>287668</p>	<p>DOC: JBOSS: Warning "Failed to define class</p> <pre>com.sun.jersey.api.json.JSONWithPadding in Module "deployment.Campaign.war:main"</pre> <p>The error is displayed on JBOSS console - though it does not have any impact.</p>

Known limitations

This table contains known limitations in Unica Plan version 12.1.

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	Defect 267800	When a single select attribute is used in a grid, the value is not saved when the grid is saved

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 not migrated over to Plan	Defect 62333	Campaign offers have a relevant products feature, Plan offers does not have this feature. Therefore, 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 cannot continue an "On Hold" Approval from right task pane	DEF057650	<p>If a reviewer has not responded to an approval in the "On Hold" state, then the task pane on the 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	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.
Metrics formulas are not validated	DEF057726	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.
Limitations in importing offer templates	DEF059793	<p>Offer templates are not imported in the following cases:</p> <p>An offer template with the same ID exists.</p> <p>An offer template with the same ID was published and deleted.</p> <p>Any form with same name is used in an offer template.</p>
Requirement for reason for denying an approval feature cannot be disabled	N/A	When Unica Plan is configured to require a reason when users deny an approval, users must select a 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	Defect 166474	When using the Unica Plan API, it is not possible to acquire a tab level lock on an

if a user has opened the people tab and other tabs in edit mode.		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
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	Defect 801917	Sorting on Page 2 for the Supporting Projects and requests will refresh the page and navigate to the first page.
Informix: error 5000 is displayed when user clicks on finalize in budget tab	HMA-305950	An error occurs when user clicks on finalize in budget tab.
With Informix database, on filling multiline values in rich text attribute, after saving the data, values entered gets trimmed and does not get saved completely, after clicking edit again also, trimmed half data is visible, rest is lost	HMA-296553	Informix has a limitation and Rich Text attributes cannot have a size of 4096 characters, including the html tags for formatting .