

# **Unica Plan V12.1.1 Release Notes**



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# Chapter 1. Release Notes for version 12.1.1

Contains information about new features, defect fixes, and known issues in Unica Plan 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 12.1.1 requires Unica Platform 12.1.1.
- For reporting, Unica Plan 12.1.1 uses the 12.1.1 version of the Unica Plan and the Unica Plan Campaign reports package.

For installation instructions, see the Unica Plan Installation Guide.

### Upgrade paths

Unica Plan supports the following upgrade paths:

- 12.1.x → 12.1.1
- 12.1.0.x → 12.1.1

Customers on versions earlier than 8.6.x must:

- perform a Fast Upgrade from existing version to version 8.6.0 (for more information, see *HCL Unica 8.6.0 Fast Upgrade Guide*).
- perform a Fast Upgrade from version 8.6.0 to version 12.1.0 (for more information, see *HCL Unica 12.1.0 Fast Upgrade Guide*).
- perform an in-place upgrade from version 12.1.0 to version 12.1.1.

Customers on versions earlier than 11.1.x.x can:

- perform a Fast Upgrade from existing version to version 12.1.0 (for more information, see *HCL Unica 12.1.0 Fast Upgrade Guide*).
- perform an in-place upgrade from version 12.1.0 to version 12.1.1.

Customers on versions 11.1.x.x/12.0.x.x can use one of the following options for upgrade:

- **Option 1**

- perform an in-place upgrade from existing version to version 12.1.0.
- perform an in-place upgrade from version 12.1.0 to version 12.1.1.

- **Option 2**

- perform a Fast Upgrade from existing version to version 12.1.0 (for more information, see *HCL Unica 12.1.0 Fast Upgrade Guide*).
- perform an in-place upgrade from version 12.1.0 to version 12.1.1.

We have updated the Unica Plan documents and you can access the latest documentation using the following links:

- **PDFs:** <http://doc.unica.com/products/index.php?showFolder=RW50ZXJwcmIzZQ==&folder=bWFya2V0b3BzLzEyXzFfMS9lbl91cw==>
- **Online Help:** <https://help.hcltechsw.com/unica/MarketingOperations/en/12.1.1/index.html>

## New features and changes in version 12.1.1

Unica Plan 12.1.1 includes the following new features.

For more information about the new features and changes in Unica Plan 12.1.1, see the Unica Plan documentation set.

### Marketing Object Default Report Type parameter

Introduced a new parameter, `Marketing Object Default Report Type`, in **umoConfiguration** to set default report type for custom marketing objects including offers.

### Auto wrap parameter

Introduced a new parameter, Auto wrap, in **umoConfiguration** >> **listingPages**. This feature enables display of long names, without truncation, instead of displaying ellipsis at the end. It is applicable to Project name, Task name, Approval name, Offer name, and Offer list name. The long name is wrapped and shown in the next line of the same row.

By default Auto wrap is set to `FALSE`. After setting the value of Auto wrap to `TRUE`, restart Platform and Plan application to activate the configuration.

## Search and sort in importing workflow templates

Introduced the search feature in Import and save workflow feature and also introduced sorting on **Name**, **Created date**, and **Last modified date** fields.

## Migrate offer/offer list history

Introduced an option to migrate offer history or offer list history to Centralized Offer Management. The history records eligible for migration must meet the following criteria:

- For offers or offerlists, which are in published state, the entire history is migrated.
- For offers or offerlists, which are in retired state, the entire history is migrated.
- For offers or offerlists, which are in draft state (either new or redrafted), all the history records till the most recent published event are migrated.

## Insights support of OneDB database for Plan

Introduced Unica Insights support of OneDB database for Unica Plan.

## Fixed defects

The following defects are fixed in Unica Plan version 12.1.1.

Issue ID	Description
HMA-329113	Migration utility, which migrated offers from Plan to Centralized Offer Management, did not work properly in case of multi-partition environment.
HMA-328802	If you opened a user selection widget, it was not completely visible for a couple of rows in the Workflow.
HMA-328624	Users could not select team members in 'projects/people' tab that had only the Plan user role.

Issue ID	Description
HMA-328059	Saving a task search, which was sorted by target date as homepage, resulted in 5000 error when logging in.
HMA-327719	Offer-related fields were overlapping when opened from Plan approvals.
HMA-327644	The Milestone rule was not being triggered when the project was created by request.
HMA-327295	Character length was not displayed when attaching offers to the approvals.
HMA-327294	Checkbox, for selection of offers, did not allow multiple selection of offers when attaching offers in the approval.
HMA-327293	For the Safari browser, Update Marketing object UI was distorted.
HMA-327136	If you closed or minimized the task panel, Gantt view screen was not getting maximized.
HMA-326037	The focus was not placed on the first field of screen.
HMA-325982	New workflow was accessible despite being in a Disabled state.
HMA-325968	In case of CDW Approval, status dropdown was disabled for users other than owner and approver.
HMA-325786	Sticky sorting issue was observed in task listing pages.
HMA-325674	Even if the required approvers were selected for a case, the approval resubmission dialog appeared requesting you to select the required approvers.
HMA-325665	Date and time formatting was incorrect for certain locales.
HMA-325642	Task list sorting lost when Completing Task or if open Task in dialog.

Issue ID	Description
HMA-325639	List column data, displayed with ellipsis, made the data difficult to read.
HMA-325574	If you used the Migration to Centralized Offer Management utility, no message appeared after offers were imported by Cenralized Offer Management.
HMA-325229	For Import workflow template, distortion was observed in UI in case of a lengthy template name.
HMA-324492	Redundant scroll bars were displayed on the Content Integration slider.
HMA-320581	In Project performance summary (Custom), few sections were displaying incorrect data units.
HMA-320579	In Project health monthly report, for MariaDB database, choosing None for projects was displaying the data for all projects.
HMA-320578	The Forecast by project type report was displaying the budget amount but not displaying the correct forecast amount.
HMA-320354	In the My task summary report, some sections like Due to start today, and Due to finish today were not displaying any data.
HMA-320353	In the Manager task summary report, few sections were not displaying display data.
HMA-320352	In My approval summary report, few sections did not display data.
HMA-320351	In Manager Approval summary, few sections were not working as expected.

Issue ID	Description
HMA-320227	The vendor name and other fields were not displayed correctly in the Detailed expense breakout report.
HMA-320221	For Program budget summary by quarter, selecting 2022 as the financial year displayed the filter as 2020 in the report.
HMA-320169	In the Project ontime analysis report, the project name was displayed twice in the drill down report.
HMA-320168	For the Project health(Trend) table, duplicate columns were displayed in the table.
HMA-320086	For Projects requested and completed, the Jobs completed count was incorrect.
HMA-320085	Unica Content Integration had a UI issue for lengthy file names.
HMA-319755	Selection of checklist, using the dropdown menu, was possible even if the user has only view permission.
HMA-319130	In case of the Internet Explorer browser, user had to click twice, in the first attempt, to select and share with users from the list.

## Known limitations

This table contains known limitations in Unica Plan version 12.1.1.

Issues	Issue ID	Description
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 <b>Approve</b>, <b>Approve w/changes</b>, and <b>Deny</b> buttons display for the approval in the task pane, but the <b>Continue</b> and <b>Cancel</b> 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 <b>Planned</b> or <b>Rollup</b> . If the user enters a formula in the <b>Computed by Formula</b> 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	Defect 166474	When using the Unica Plan API, it is not possible to acquire a tab level lock on an object. The API only

exception even if a user has opened the people tab and other tabs in edit mode.		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.

## Known issues

This table contains known issues in Unica Plan version 12.1.1.

Issue ID	Description
HMA-330655	<p>Auto wrap configuration is missing in Docker environment.</p> <p><b>Workaround:</b></p> <p>Create an XML file with following content:</p> <pre>&lt;property name="Auto wrap" type="radio"&gt; &lt;value predefined="true" selected="false"&gt;true&lt;/value&gt;</pre>

	<pre>&lt;value predefined="true" selected="true"&gt;false&lt;/value&gt; &lt;/property&gt;</pre> <p>If the XML filename is <code>auto_wrap.xml</code>, execute following command:</p> <pre>./configTool.sh -i -p   "Affinium Plan umoConfiguration listingPages" -f   &lt;location of auto_wrap.xml&gt;</pre>
HMA-330133	In some cases, clicking Save for later throws an error and does not save the approval.
HMA-330116	Selecting the approver, under the pre-assigned role, displays two steps in the approval steps.
HMA-330115	Deleting approvers, from the selected steps, does not unblock the users from selection after the steps are deleted.
HMA-329839	In Unica Insights Reports, today's date is not mentioned at the bottom of the excel exported file type.
HMA-329470	For OneDB, by default, the <code>dbtype</code> in <code>umoconfiguration</code> of Plan shows all five values. We must manually edit it and set it to <code>OneDB</code> .
HMA-329402	Centralized Offer Management offers displays an error and redundant buttons "Actions" and "Close", when user opens it from Approval > Items for approval.
HMA-328588	Offer revision history not getting localized.
HMA-326549	Approvals should not be automatically delegated when it is in Not started state.
HMA-307200	On the enhanced workflow UI, you cannot move stages using drag-and-drop.
HMA-303840	On a Plan setup with OneDB database, if you navigate to <b>Plan &gt; Tasks &gt; All Tasks</b> , a <code>5000 Error</code> appears.

	<p><b>Workaround:</b> On the OneDB database, execute the following command:</p> <pre>onmode -wf SQL_FEAT_CTRL2=0x10</pre>
HMA-283675	When URL value is used in a single select attribute value, all attribute values display.
HMA-283523	When an OOO user tries to assign the task to himself, delegation fails.
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>
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).
N/A	REST API support is not available for all APIs. To see supported APIs in V12, see the Unica Plan REST APIs documentation.
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>&lt;DB2-HOME&gt;\BIN&gt;db2set DB2_ANTIJOIN=NO</pre>

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>
HMA-176872, HMA-176873	<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>
N/A	<p>In a Safari browser, when you click <b>Download Original</b> 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 <b>Option</b> key and click <b>Download Original</b> to download without opening new blank tab. You can also right click <b>Download Original</b> to open a context pop-up menu. Click <b>Save Image As...</b> to save the file to the desired location. It does not open a new tab.</p>