Unica Plan V12.1.2 Release Notes

Contents

Chapter 1. Release Notes for version 12.1.2

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 12.1.2 requires Unica Platform 12.1.2.
- For reporting, Unica Plan 12.1.2 uses the 12.1.2 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 → 12.1.2
- 12.1.0.x → 12.1.2

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 12.1.2.

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 12.1.2.

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 12.1.2.
- **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 verison 12.1.2.

Unica Plan 12.1.0 supports the fast upgrade approach. This helps in bypassing the multistep upgrade. The Fast Upgrade approach is also useful in reducing upgrade downtime. The approach is provided for Unica Platform, Campaign, Collaborate, Plan, and Interact.

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=RW50ZXJwcmlzZQ==&folder=bWFya2V0b3BzLzEyXzFfMi9lbl91cw==
- **Online Help**: https://help.hcltechsw.com/unica/MarketingOperations/en/12.1.2/index.html

New features and changes in version 12.1.2

Unica Plan 12.1.2 includes the following new features.

For more information about the new features and changes in Unica Plan 12.1.2, see the Unica Plan documentation set.

To-do Checklist Notifications

You can now use alerts for the Checklist and To-do feature as well.

Slack Integration

Message board now integrates out-of-the-box with Slack messaging tool. It is applicable only for the Project Messge board. For more information see Unica Content Integration Framework Slack Integration Guide.

`serverURLInternal`

A new parameter serverURLInternal is introduced in **Settings > Configuration > Unica Plan > navigation**. This parameter specifies the internal URL of the Unica Plan server. If you are using reverse proxy or web access management software (ISAM, Siteminder, etc), set this parameter to the internal URL of Unica Plan. Otherwise, set its value to the value of **serverURL** (`Affinium|Plan|navigation|serverURL`).

This value is used by other Unica applications when they consume Plan's new rest APIs v2, for example, Offer Approval in Centralized Offer Management.

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Offer Approval

Unica Plan approvals are now enabled to approve Centralized Offer Management offers.

Fixed defects

The following defects are fixed in Unica Plan version 12.1.2.

Issue ID	Description
HMA-334044	The modified workflow was not retaining the correct duration when saved as a template
HMA-333996	When you executed a trigger binding (for Approval Approved/Approved with Changes), if the trigger failed, a generic 5000 error appeared instead of displaying the specific error.
HMA-332890	On a Docker setup, when searching users in checklist, the last row was displayed as a blank.

Issue ID	Description
HMA-332888	On a Docker setup, checkboxes were not displayed for default alert subscription.
HMA-332657	Project owners and users with full PlanAdmin status could not access any task that was assigned to a team group or a teamp group member.
HMA-332648	Plan version 12.1.1 was facing issues on OneDB with JDBC driver `onedb-jdbc-8.1.0.0`.
HMA-332382	In the new task workflow user interface, edit workflow permission was preventing Task users from adding an attachment.
HMA-332281	Users could not modify a single row on the Reassign Team Request Window.
HMA-332161	When migrating offers history from Plan to Centralized Offer Management, a NullPointerException was getting displayed.
HMA-330808	Some user experience issues existed with Plan Reports.
HMA-330721	User could perform actions related to PlanAdmin role without having the role assigned to them.
HMA-330655	Auto wrap configuration is missing in the Docker environment.
HMA-330157	On MariaDB database, users could execute create lookup table queries of exported form with SSDB attributes.
HMA-329845	Some user experience issues existed in exported report files.
HMA-329835	If you exported files from Insights Reports, the name of the exported files had `dbtype` as the file name instead of a report name.

Issue ID	Description
HMA-329834	Exporting the System Projects report to PDF format, using Insights Reports, was displaying incomplete data in the exported PDF.
HMA-329470	For OneDB, by default, the `dbtype` in `umoconfiguration` of Plan was showing all five values. The user had to manually edit it and set it to `OneDB`..
HMA-329402	Centralized Offer Management offers used to display an error and redundant buttons "Actions" and "Close", when user opened it from Approval > Items for approval.
HMA-327379	A Journey was getting linked without selecting the Journey in "Link a journey" pop-up.
HMA-327378	The following issues existed while Linking a Journey: • User experience issues. • There was no notification even if the Journey was already linked to another Project. • The Save button was enabled even without selecting a Journey.
HMA-327376	A confirmation was not appearing while removing a linked Journey.
HMA-327137	The order of the task number was not maintained if you added multiple tasks.
HMA-326378	The confirmation dialog for "Delete" operation had user experience issues.
HMA-326134	In the TCS tab, clicking on offers and offer lists was redirecting to different pages.

Issue ID	Description
HMA-325666	For Japanese and Korean locales, incorrect date format or missing date units were displayed in the created to-do in the "Notes" tab.
HMA-324193	If Centralized Offer Management was enabled, offer lists were not displayed in the workflow approval.
HMA-323959	In the Approvers section, dragging-and-dropping users was not displaying the names or the count of users in the pre-view.
HMA-311186	Available resources group was expanding when you drag a user to the right panel.
HMA-303840	On a Plan setup with OneDB database, if a user navigated to **Plan > Tasks > All Tasks**, a `5000 Error` appears. This issue is fixed and the user needs to set the following configuration parameter on OneDB database: ```onmode -wf SQL_FEAT_CTRL2=0x10```

Known limitations

This table contains known limitations in Unica Plan version 12.1.2.

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 al-	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

ways localize correctly		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	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. 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.
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	Offer templates are not imported in the following cases: 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 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 if a user has opened the people tab and	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.

other tabs in edit mode.		
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 12.1.2.

Issue ID	Description
HMA-334544	If you use the rich text editor, it displays a license error for Invoices and Assets.
HMA-334268	If users are added to tasks or approvals, they are added to the Peoples tab but not to the Slack channel.
HMA-333931	Deleting a Plan project does not delete the corresponding Slack channel.
HMA-333333	The menu item Checklist is not getting localized for the following languages:

	• Chinese - Simplified • Chinese - Traditional • French • Italian • Japanese • Korean • Portuguese • Russian • Spanish
HMA-333002	On Internet Explorer browser, for a new workflow, Save and Cancel buttons do not work properly, for Tasks, if you change the duration.
HMA-332834	On Plan Reports, the Resource Task Load has some input fields that are mentioned as Optional as well as Mandatory.
HMA-332833	There is no progress bar to know if the Birt report is loading or not.
HMA-332730	For Approvals, the same user can be added as an Approver from multiple groups.
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, todays date is not mentioned at the bottom of the excel exported file type.
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-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	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. This issue does not occur if you upgrade from version 10.1 or newer version.
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	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 `DB2_ANTIJOIN` registry parameter to NO and restart the DB2 server. Forexample, `<DB2-HOME>\BIN>db2set DB2_ANTIJOIN=NO`
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 scroll the field to see the contextual menu of table when they selects a cell.
HMA-176872, HMA-176873	During installation, uppercase database credentials cause errors. Workaround: Enter database details for the host name and domain name in lower case characters.
N/A	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. 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.