



CRM ON DEMAND

Product Release Notes

Release 35

November 2017
VERSION 20171124

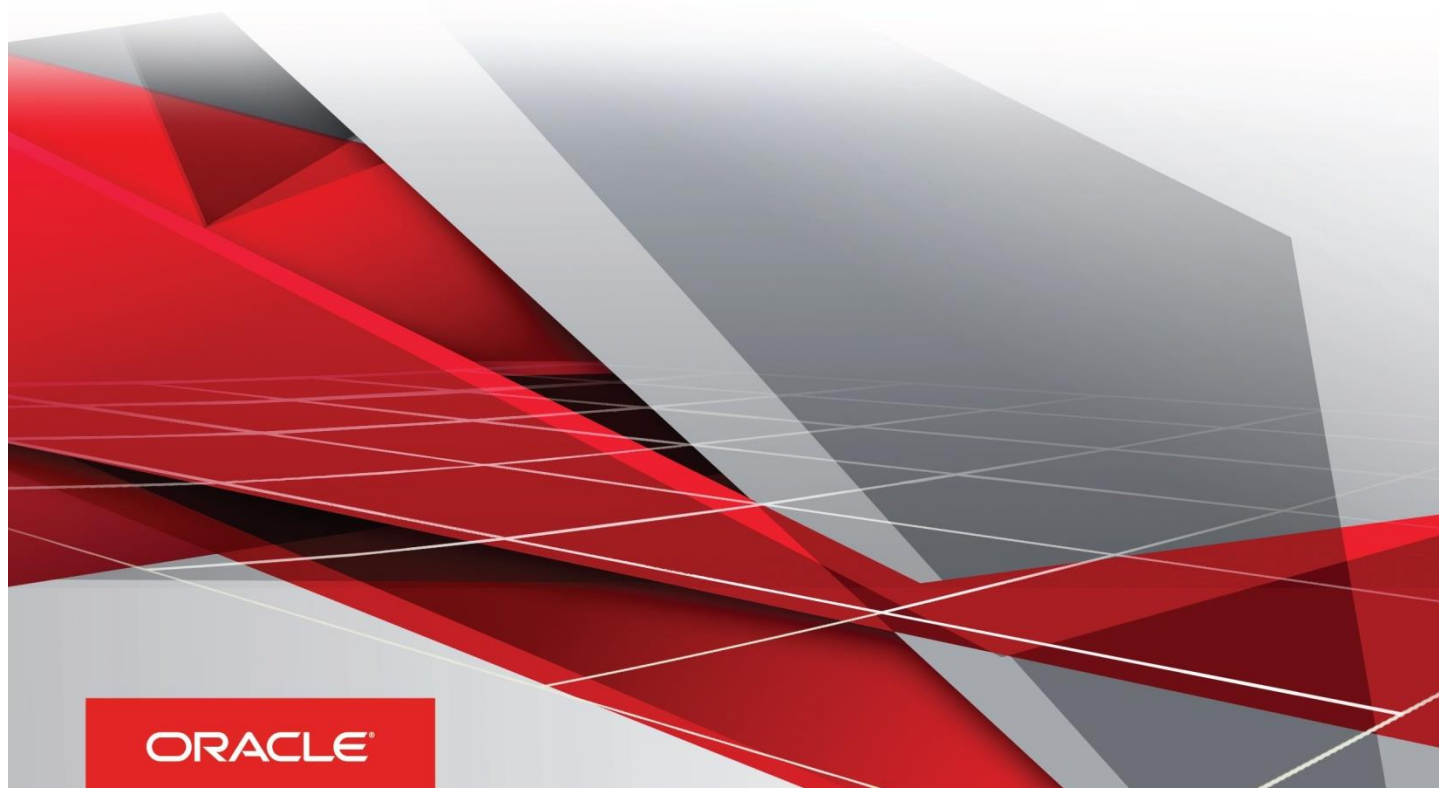





Table of Contents

Document Versioning	5
Overview	6
Customer Impact	6
Analytics	6
Gauge View Ranges in V3 Reports	6
Manage Custom Reports Privilege and My Folders Access in V3 Analytics	6
Maximum Number of Sections in Views in V3 Analytics	6
Pre-built Communications Dashboard In V3 Analytics	7
Pre-built V3 Dashboards and Last Refresh Date	7
V2 to V3 Analytics Migration	7
V3 Analytics	8
V3 Reports and Dashboards with Long Names at Runtime	8
V3 Reports with Filter Prompts on Nullable Columns	8
Known Issues	8
Analytics	8
Accessing the Analytics Tab after Clicking an Action Link in V3 Analytics and	
Custom Themes	8
Action Link Strings with no Translation in V3 Analytics	8
Action Links Using Custom CSS ActionLink Class in V3 Analytics	8
Action Links with Fixed Checkbox Checked in V3 Analytics	8
Back Button Behavior when Editing Dashboards in V3 Analytics	9
Breadcrumb Issue when Drilling Down from an Embedded Dashboard to another	
Dashboard in V3 Analytics	9

Catalog Timeout in V3 Analytics	9
Chrome Issue when Viewing Dashboards with Many Pages in V3 Analytics	9
Chrome Related Issues with Views in V2 Reports	9
Column Name Wrap Issue when Downloading to PPT Format in V3 Analytics	9
“Create...” and “New” Link Displayed for Users with Insufficient Privileges in V3 Analytics	9
Drill Down Behavior for Embedded Dashboards Containing Reports with Drill Down to Other Reports in V3 Analytics	10
Drill Down from an Embedded Dashboard with Multiple Elements to another Dashboard in V3 Analytics	10
Editing a Report in V3 Analytics without Having the Manage Reports Privileges	10
Embedded Dashboards Having Analyze and Edit Options Enabled in V3 Analytics	10
Embedding V3 Dashboards	10
Embedding V3 Reports and Dashboards with Names Containing “:” character	10
Exporting Dashboards to Excel in V3 Analytics	10
Firefox Issue when Creating New Filters in V3 Analytics	11
Folders Containing Pre-built Reports in V3 Dashboards	11
Folders Containing Reports in V3 Dashboards	11
Help Links in V3 Analytics	11
Hovering over Pre-built Analysis Folder in V3 Analytics	11
Hovering over Subject Areas in V3 Analytics	11
IE Issue with Maximum Number of Trellis Views in V3 Analytics	11
Label from Save Current Customization Window Inherits the Font from the Custom Theme in V3 Analytics	11
Maximum Number of Dashboards underneath the Dashboards Folder in the Catalog Page in V3 Analytics	12



Objects Names and Special Characters in V3 Analytics	12
Objects with Long Names in V3 Analytics	12
Paste Icon not showing in Catalog with Certain Versions of Chrome in V3 Analytics	12
PDF Option from Printer Friendly in V2 Analytics Displays the HTML tags	12
Pop Up Windows in V3 Analytics	12
Preview Mode and Action Links in Dashboards in V3 Analytics	12
Report Names in Preview Mode in V3 Analytics	12
Report Services API with ReportList Method and Folders Containing Commas in V2 and V3 Analytics	13
Report Services API with ReportList Method and Reports with Double Quotes in V2 and V3 Analytics	13
Return Links in Embedded Dashboards in V3 Analytics	13
Safari Related Issues with Action Links in V3 Analytics	13
Switching to Content Pagination from Scrolling Content with Get More Rows in V3 Reports	13
Translations for “Analytics V3” in Usage Tracking Columns in V3 Analytics	13
V3 Analytics and Working with Tablets	13
V3 Dashboards Having Names Longer than 512 Characters	14
V3 Reports with “Title” Views containing Logo Image	14
Widgets Embedding Reports with Names that Contain Special Characters in V2 and V3 Analytics	14
Usability	14
Issue with Dynamic Update of Record Indicator	14
Language Support	15
Fixed Issues	15



Documentation	17
Online Help	17
Topic: Analytics	17
Topic: Reviewing Export Results	17

Document Versioning

Date	Version	Change Reference
Nov 24, 2017	20171124	Added bugs 26392469 and 26278251 to Fixed Issues section Added Customer Impact – V2 to V3 Analytics Migration
Sep 27, 2017	20170927	Added Known Issues – Analytics > PDF Option from Printer Friendly in V2 Analytics displays the HTML tags
Aug 31, 2017	20170831	Final version published
Aug 1, 2017	20170801	Draft Published

Overview

The Oracle CRM On Demand Release 35 Product Release Notes outline the known issues, the customer impacts, and the changes to the Oracle CRM On Demand user interface and behavior. The Release Notes also list the defects and behaviors that Oracle CRM On demand has fixed in this release.

To review the features included in this release, see *Oracle CRM On Demand Administrator Preview Guide* for Release 35, which is available at the Oracle CRM On Demand Training and Support Center portal, in the Release Information tab under What's New. In addition, see the Transfer of Information (TOI) recordings, which are available in the [Oracle CRM On Demand Online Documentation Library for Release 35](#).

Customer Impact

Analytics

Gauge View Ranges in V3 Reports

In V3 Reports, when users add Gauge views, Oracle CRM On Demand no longer displays the Gauge Ranges as numbers but as percentages in comparison with V2 Reports. The Gauge chart legend displays these ranges as numbers. This is the default functionality in V3 Analytics.

Manage Custom Reports Privilege and My Folders Access in V3 Analytics

In V3 Analytics, if users have the Manage Custom Reports privilege in their role, but do not have the Manage Personal Reports privilege, then they are able to save reports under My Folders as well as under Company Wide Shared Folder. However, if users only have the Manage Personal Reports privilege, then they are only able to save reports under My Folders.

Maximum Number of Sections in Views in V3 Analytics

In V3 Reports, in the Layout pane, Oracle CRM On Demand displays the columns in a data view in drop targets. Drop targets indicate where you can insert, mover, or drop a column. You can use drop targets to modify the way to arrange data in a data view by dragging and dropping columns to different targets within the view. You can use the Sections drop target to divide a view into sections based on the different values of a column that you drop into the Sections drop target. The following table shows the maximum number of sections for each type of view:

View Type	Maximum Number of Sections
Table	1000
Chart	25

Pivot	1000
Treemap	50
Simple Trellis	10
Advanced Trellis	25

Pre-built Communications Dashboard In V3 Analytics

In V3 Analytics, the Communications Dashboard is no longer available because Customer Care On Demand is at its end of life.

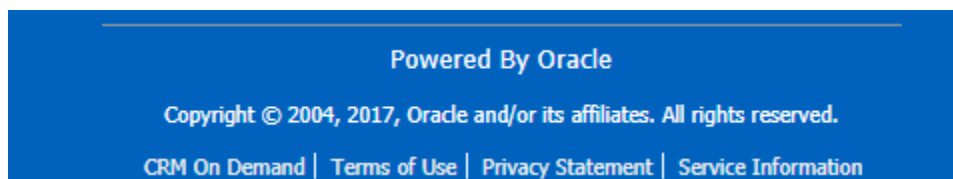
Pre-built V3 Dashboards and Last Refresh Date

In V3 Analytics, the Pre-built Dashboards are now using the newly introduced session variable `USER_LAST_REFRESH_DT` for the *Data refreshed as of* field, instead of `LAST_REFRESH_DT` used in V2 Pre-built Dashboards. The `USER_LAST_REFRESH_DT` is the timestamp of the start of the most recent refresh of the historical data in the user's time zone.

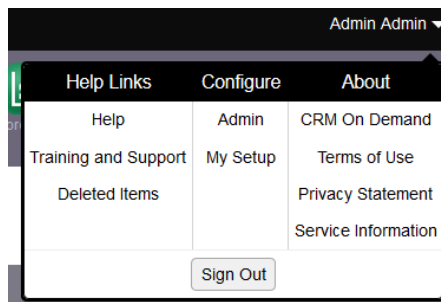
V2 to V3 Analytics Migration

Company Shared V2 Analytics objects will be migrated to V3 Analytics for each company. When your company is scheduled to have the Analytics objects migrated, a "Webcat Migration" activity with status "Scheduled" will be displayed in the Production Maintenance Schedule section on the Service Information page. Once the migration is complete, the status will become "Completed".

For Classic UI, the link to the Service Information page is displayed at the bottom of the page:



For Modern UI, the link to the Service Information page is displayed in the menu under the user's name:



V3 Analytics

With Release 35, the Oracle CRM On Demand has upgraded the Analytics platform and a new tab is available: Analytics.

NOTE: For more information, consult the [Introducing V3 Analytics](#) and the [V3 Analytics Considerations](#) documents. It is important to review these documents because they contain details about the new platform and reports migration, and how you can prepare for the migration.

V3 Reports and Dashboards with Long Names at Runtime

In V3 Analytics, at run time, when opened, Oracle CRM On Demand displays the V3 report or dashboard in a tab. If the name of the migrated report or dashboard is long, Oracle CRM On Demand displays it properly in the title, but truncates the name in the tab's caption. This is the default functionality for V3 Analytics.

V3 Reports with Filter Prompts on Nullable Columns

In V3 Reports, filter prompts on columns that can contain null values have an extra NULL value in the values drop down for the V3 reports. This gives the user the ability to select the records where the column value IS NULL (empty). This is the default V3 Analytics functionality.

Known Issues

Analytics

Accessing the Analytics Tab after Clicking an Action Link in V3 Analytics and Custom Themes

In V3 Analytics, with a few themes like Biotech / Life Sciences, Technology, Oracle 2010, Manufacturing, when users click on an action link that navigates to the BI content and they access the Analytics tab afterwards, Oracle CRM On Demand still displays the BI content instead of the Analytics homepage. The workaround is to use other themes that do not reproduce the issue, or to sign out and sign back in to Oracle CRM On Demand.

Action Link Strings with no Translation in V3 Analytics

In V3 Analytics, while creating an Action Link, Oracle CRM On Demand displays some of the strings in ENU. These strings are "Invoke Browser Script", "Record Type" and "Row Id".

Action Links Using Custom CSS ActionLink Class in V3 Analytics

In V3 Analytics, users cannot create action links using the custom CSS ActionLink class as in V2 Analytics. V3 Analytics provides another mechanism to create action links. Users must recreate the action links using the new mechanism as presented in the [Introducing V3 Analytics](#) document.

Action Links with Fixed Checkbox Checked in V3 Analytics

In V3 Analytics, when users create action links and select the 'Fixed' checkboxes, the action links become nonresponsive and navigation to the action links is not possible. The workaround is to leave the 'Fixed' checkbox unselected.

Back Button Behavior when Editing Dashboards in V3 Analytics

In V3 Analytics, after users edit, save and run a dashboard, if they access the back button of the browser, then the changes disappear. Clicking refresh from the browser correctly displays the changes.

Breadcrumb Issue when Drilling Down from an Embedded Dashboard to another Dashboard in V3 Analytics

In V3 Analytics, when you embed dashboards with reports having drill downs to other dashboards in Web applets and tabs, the drill down functionality works correctly. However, if following the drill down, users access the Recently Viewed records, navigate to a detail record in Oracle CRM On Demand, access the Back to Analytics link, and then they navigate back to the dashboard, then the Back to Analytics link displays again instead of the Back to My Homepage link. By clicking the Back to Analytics link a second time, the correct Back to My Homepage link displays. This is a navigational issue with the breadcrumbs, and users must do an additional click to navigate back to My Homepage.

Catalog Timeout in V3 Analytics

In V3 Analytics, when a session has timed out and the users are expanding a folder or accessing an object in the Catalog page, Oracle CRM On Demand keeps displaying the processing icon and users do not receive any message. The moment the users are accessing other links from the V3 Analytics global header, the Oracle CRM On Demand displays the Sign In page for users to reconnect.

Chrome Issue when Viewing Dashboards with Many Pages in V3 Analytics

In V3 Analytics, using Chrome when certain dashboards contain many pages results in an interruption of the horizontal line displayed underneath the Dashboards tabs.

Chrome Related Issues with Views in V2 Reports

With the latest versions of Chrome, when creating or editing V2 Reports containing narrative or funnel views, users might see errors in “Step 2 – Create Layout” of the report. The error message is “Chrome detected unusual code on this page and blocked it to protect your personal information (for example, passwords, phone numbers and credit cards)”. Users do not encounter this issue with any other browsers nor with V3 Analytics. This issue is not specific to a certain release of Oracle CRM On Demand and it might be noticed in earlier releases than Release 35.

Column Name Wrap Issue when Downloading to PPT Format in V3 Analytics

In V3 Analytics, when downloading reports to PPT format, the column names do not wrap properly for non-English languages. Users can manually fix the column name so that it fits within the column.

“Create...” and “New” Link Displayed for Users with Insufficient Privileges in V3 Analytics

In V3 Analytics, when users navigate to Analytics tab and do not have the Manage Custom Reports, Manage Personal Reports, or Manage Dashboards privileges, the “Create...” text and the ‘New’ link still show on the Homepage even though the users cannot create any Analytics object.

Drill Down Behavior for Embedded Dashboards Containing Reports with Drill Down to Other Reports in V3 Analytics

In V3 Analytics, when dashboards with reports having drill downs to other reports are embedded in Web applets and tabs, the drill down functionality works correctly, but the reports you drill down to are displayed in the same page and not in a new page, as is the case with V2 Analytics.

Drill Down from an Embedded Dashboard with Multiple Elements to another Dashboard in V3 Analytics

In V3 Analytics, embedding dashboards with multiple pages, subpages, dashboard prompts and reports having drill downs to other dashboards in Web applets and tabs, affects the drill down and the server responds with an exception.

Editing a Report in V3 Analytics without Having the Manage Reports Privileges

In V3 Analytics, when users who do not have the Manage Reports privilege attempts to edit a report by clicking the Edit link, an error message with Access Prohibited gets displayed. However, the text of the message has a reference to Oracle BI Answers, which is the name used for V2 analyses.

Embedded Dashboards Having Analyze and Edit Options Enabled in V3 Analytics

In V3 Analytics, when dashboards with the Analyze and Edit options enabled are embedded in Web applets or tabs, Oracle CRM On Demand displays the Homepage links as well.

Embedding V3 Dashboards

In V3 Analytics, users cannot embed dashboards that they do not save directly under the Dashboards folder in Web applets, Web tabs, and global applets for record, nor can they refer to them in Web links. Users will receive an error message "Only dashboards saved directly under the Dashboards folder can be embedded" when they try to select a dashboard that is not saved directly under the Dashboards folder from the picklist.

Embedding V3 Reports and Dashboards with Names Containing ":" character

In V3 Analytics, users cannot embed the reports and dashboards that contain the ":" character in the name in Web applets, Web tabs, and global applets for records and cannot refer to them in Web links. Users receive an error message when they try to select a report or a dashboard that has the ":" character in its name from the picklist.

Exporting Dashboards to Excel in V3 Analytics

In V3 Analytics, when users export dashboards to Excel, the alert window displays the text "Exporting to Undefined" instead of "Exporting to Excel".



Firefox Issue when Creating New Filters in V3 Analytics

In V3 Analytics using Firefox, when creating new filters, the browser occasionally renders twice the 'Search', 'Sort', 'Add / Remove Subject Areas' and 'Refresh Display' icons in the Subject Areas pane. Users cannot replicate the issue consistently.

Folders Containing Pre-built Reports in V3 Dashboards

V3 Dashboards with folder objects containing prebuilt analyses display extra non-expandable folders for each prebuilt report contained in the folder. The issue does not affect functionality.

Folders Containing Reports in V3 Dashboards

In Preview mode, V3 Dashboards containing folders will not render the reports inside the folders as hyperlinks, however when the report names are clicked they can be opened. This rendering issue does not affect functionality.

Help Links in V3 Analytics

In V3 Analytics, the contextual help links do not always point to the correct sections in Online Help. Users can use search in Online Help to find the appropriate help pages.

Hovering over Pre-built Analysis Folder in V3 Analytics

In V3 Analytics, when hovering over the Pre-built Analysis folder, the tooltip displays the string "The folder contains analytics published for all CRM On Demand users" and it is different than the V2 Analytics behavior, where the tooltip displays the name of the folder.

Hovering over Subject Areas in V3 Analytics

In V3 Analytics, when hovering with the mouse over the name of some subject areas, in certain languages (French), Oracle CRM On Demand does not display the entire name of the subject area.

IE Issue with Maximum Number of Trellis Views in V3 Analytics

In V3 Analytics, users cannot create an analysis with six or more trellis views when using Internet Explorer. The users need to limit the number of trellis views to a maximum of five for each report, or use other browsers.

Label from Save Current Customization Window Inherits the Font from the Custom Theme in V3 Analytics

In V3 Analytics, the Save Current Customization window renders the label of the "Make this my default for this page" checkbox with the large fonts, inheriting the font size from the custom theme.

Maximum Number of Dashboards underneath the Dashboards Folder in the Catalog Page in V3 Analytics

In V3 Analytics, there is a limit of 300 objects that users can view through the Catalog page for the dashboards underneath the Dashboards folder, even though the objects exist in the catalog. Users must use the search functionality to be able to find an object that does not display in the Catalog page. In addition, they need to reorganize these objects by saving them in folders and sub-folders since this option is now available for dashboards in V3 Analytics.

Objects Names and Special Characters in V3 Analytics

In V3 Analytics, catalog objects or folders having in their names the string '\$&' can cause the Chrome browser to become unresponsive. Users must use other browsers, or rename the folder or object.

Objects with Long Names in V3 Analytics

In V3 Analytics, when an object is saved with a name that exceeds 80 characters in length, the object is displayed as "..." in the 'Save as' dialog box. The issue occurs in the Firefox and the Internet Explorer 11 browsers, but not the Chrome browser. Users must use other browsers or save the object with a shorter name.

Paste Icon not showing in Catalog with Certain Versions of Chrome in V3 Analytics

In V3 Analytics, some versions of Chrome browsers do not always display the Paste icon in the toolbar. This behavior is not visible with other browsers. Users might need to use another browser, if the specific version of Chrome has this rendering issue.

PDF Option from Printer Friendly in V2 Analytics Displays the HTML tags

In V2 Analytics, when users define column formulas containing HTML tags, although the column Data Format is specified as HTML, when choosing the PDF option from Printer Friendly, the downloaded PDF displays the HTML tags, instead of rendering them. The issue is resolved in V3 Analytics.

Pop Up Windows in V3 Analytics

In V3 Analytics, pop up windows such as for confirmation dialogs and alerts do not always display centered in the V3 Analytics frame. Users have to scroll down and drag the pop up window up to see the entire content of the window.

Preview Mode and Action Links in Dashboards in V3 Analytics

In V3 Analytics, the action links added to the dashboards do not respect the Oracle CRM On Demand theme when viewed in preview mode, but the theme is respected when the dashboards are opened and run.

Report Names in Preview Mode in V3 Analytics

In V3 Analytics, for reports with multiple words in their name, in preview mode, the banner height increases in size to display the entire report name and Oracle CRM On Demand displays each word on one line.

Report Services API with ReportList Method and Folders Containing Commas in V2 and V3 Analytics

The Report Services API output is incorrect when the folder name contains a comma and users execute the ReportList method. As a workaround, users must remove the comma before using the API. The issue occurs in V2 Analytics as well.

Report Services API with ReportList Method and Reports with Double Quotes in V2 and V3 Analytics

If the report name contains double quotes when the user executes the Report Services API with the ReportList method, then double quotes shift to a different position in the Report Name. The workaround is for users to remove the double quotes before using the API. The issue occurs in V2 Analytics as well.

Return Links in Embedded Dashboards in V3 Analytics

In V3 Analytics, when users configure global applets containing dashboards in their pages, Oracle CRM On Demand concatenates the return links displayed at the bottom of the global applets with references to the newly created dashboards. This is a minor issue because Oracle CRM On Demand displays the content of the global applets properly but users might display a dashboard that was not configured for the global applet, by accessing the return links.

Safari Related Issues with Action Links in V3 Analytics

In V3 Analytics, when clicking the OK button to create action links, with certain versions of the Safari browser, the browser does not respond. Users must use other browsers or another version of the Safari browser.

Switching to Content Pagination from Scrolling Content with Get More Rows in V3 Reports

In V3 Reports, on the Results tab, when editing the View properties for a Table view, an additional option “Fixed headers with scrolling content” is available and selected by default. In the Results tab, when viewing the data by scrolling to the bottom, Oracle CRM On Demand displays a “Get more rows” link. When you click this link, Oracle CRM ON Demand displays the data in the view and the “Get more rows” message disappears. If users edit Table View Properties and change the Data Viewing radio button to Content paging, Oracle CRM On Demand displays an error in the Table View. The error message is “The layout of this view combined with the data, selections, drills, or prompt values chosen, resulted in no data”. The workaround is to edit Table View Properties, select the Content paging radio button, and specify a value in the Rows per Page edit field, and then click OK.

Translations for “Analytics V3” in Usage Tracking Columns in V3 Analytics

In V3 Analytics, the Content Category and Content Category Code columns do not have translations for the “Analytics V3” string.

V3 Analytics and Working with Tablets

Testing with Tablets and V3 Analytics has identified the following issues:

- Android with O/S Google Nexus 7 Tab with Android 6.0.1:
You cannot Create Analysis, Dashboard, Filter or Dashboard Prompt
You cannot drill down in charts although the charts display
- iPad with O/S iOS 9.3.5 with Safari Latest Browser:
You cannot Create Analysis, Dashboard, Filter

V3 Dashboards Having Names Longer than 512 Characters

In V3 Analytics, when users try to save a dashboard with a name longer than 512 characters results in an error message, but the dashboard is actually saved. The error message is “Invalid item name – not allowed to be longer than 512 characters”. The workaround is for users to reduce the length of the dashboard name to avoid the error message.

V3 Reports with “Title” Views containing Logo Image

In V3 Reports, similar to V2 Analytics, users can add views of type “Title” to their reports. When using this type of view they can optionally add a Logo by specifying the URL of a custom image. Oracle CRM On Demand does not render the images in V3 Reports.

Widgets Embedding Reports with Names that Contain Special Characters in V2 and V3 Analytics

Widgets are not working when report or dashboard names contain special characters. The workaround is to remove the special characters. The issue occurs in V2 Analytics as well.

Usability

Issue with Dynamic Update of Record Indicator

In scenarios such as associating a record in the detail page of a record that results in the addition of the associated record in the Related Information section, the record indicator appears on the Related Information applet only after an explicit page refresh. For example, populating the Account field on the Contact Detail page results in the addition of the account as related information for the contact.

Language Support

The following table outlines the supported languages for Oracle CRM On Demand and its related applications:

	Chinese Simplified	Chinese Traditional	Danish	Dutch	English-American	English-British	Finnish	French	German	Italian	Japanese	Korean	Norwegian	Polish	Portuguese	Portuguese – Brazilian	Russian	Spanish	Swedish	Thai	Turkish
Oracle CRM On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle CRM On Demand Desktop	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle Contact On Demand					✓																
Oracle Email Marketing On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	
Oracle CRM On Demand Connected Mobile Sales for iPhone and Android*	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		✓	
Oracle Offline On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	
Oracle Notes Email Integration On Demand					✓																
Oracle Outlook Email Integration On Demand					✓																

† Oracle CRM On Demand Desktop Version 4.1 only supports English-American. For information on supported languages for Oracle CRM On Demand Desktop Version 4.2, refer to *Oracle CRM On Demand Desktop Product Release Notes for Version 4.2*.

* For information on supported languages for Oracle CRM On Demand Connected Mobile Sales, refer to *Oracle CRM On Demand Connected Mobile Sales Product Release Notes*.

Fixed Issues

The following defects have been fixed in Oracle CRM On Demand Release 35.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
25545640	Admin	Partner user gets 'Access Denied' error for some leads while he can access other leads, when the user's access to both the records are the same.
26392469	Admin	Users with roles without the "Manage Roles and Access" privilege are able to add or remove roles for Company Alerts via the Associated Roles related

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
		information section of the Alerts detail page.
25263117	Analytics	Changing the currency symbol in reports with pie charts showing revenue measure does not get reflected in the report. The bug is fixed in V3 Analytics.
10645758	Analytics	Column labels cannot be edited in pivot tables. The bug is fixed in V3 Analytics.
24433776	Analytics	Navigation does not happen when clicking on a chart with a long product name. The bug is fixed in V3 Analytics.
23554722	Analytics	Printer friendly PDF page of a report containing narrative sections with HTML code is losing the formatting.
17838929	Analytics	Report containing combined analyses and grand totals throws intermittently "A general error has occurred. [nQSError: 42015] Cannot function ship the following expression: Report_Sum(D1.c11 by [])".
16613272	Analytics	Reports that include pie charts show inconsistently the navigation menus. The bug is fixed in V3 Analytics.
23290927	Analytics	Reports with columns based on dimensions and filters based on facts throw "A general error has occurred. [nQSError: 14023] None of the fact sources for Dim are compatible with the detail filter".
25262175	Analytics	Reports with filters containing "VALUEOF(NQ_SESSION.'USER_REGION') is null" fail for random users.
21874491	Analytics	Text is not wrapped in formula editor. The bug is fixed in V3 Analytics.
24287422	Analytics	The report Pipeline Quality from the pre-built Pipeline dashboard displays the legend overlapping the chart view.
24801511	Analytics	Total amounts calculation changes when refreshing the page. The bug is fixed in V3 Analytics.
21026749	Analytics	When you choose "Browse through choices" in a column filter prompt the prompt caption is duplicated above the prompt window in the UI.
24759560	CRM	Attachments with names containing control characters (tabs), can be uploaded via UI. Web Services querying for such attachments return an error "Error occurred while opening file. Attachment may contain a virus.".
25550691	CRM	Country picklist does not show the correct names for Comoros and Republic of Korea.
24918083	CRM	For the opportunity object, when customize previous owner is set with the setting: Always retain owner with edit access, the previous owner is not retained in the team and the access is not given.
26278251	CRM	Users are unable to modify the start time and end time of an Appointment with a reminder configured when their access profile is configured with No Access to the User record type as a child of Activity.
25358488	Customization	Entering special characters when customizing record types labels throws SBL-ODS-00203 upon saving
25505815	Customization	In Activity object, two standard fields 'Status' and 'Contact State' ended up with the same translation in Spanish. This causes issues since the values in the Status picklist cannot be saved.
25478737	Customization	Related picklist of the Account Country parent picklist in Opportunity object does not show correct values when creating a new Opportunity.
25199700	Data Management	Mass Updating Opportunity Revenue Records fails when the Opportunity Revenue list is sorted before attempting the Mass Update.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
25757453	Search	When using Internet Explorer 11, hovering over the search magnifying glass would open a window, but would crash when changing the dropdown selection.
25917624	UI/Usability	CRM On Demand instance which is integrated on another web page using iFrame element is not loading.
25823012	UI/Usability	In Spanish language, When 'All Converted Leads' list is refined, the list shows no records due to the incorrect language translation for Status field value.
25702995	UI/Usability	On navigating to a record detail page from list or search results, the link to go back to the previous page is missing.
25397988	UI/Usability	On save of user record, the field value of 'Reports To' field gets nullified.

Documentation

Online Help

The following documentation errors or omissions exist in Release 35 and will be corrected in a subsequent update.

Topic: Analytics

NOTE: This section is not translated with Release 35. It is only available in English.

Topic: Reviewing Export Results

The following information is missing from this topic:

To access and download the export request attachments for export operations performed by all users in the Export Request Queue page, your user role must have the Access all Export Request Attachments privilege. If your user role does not have this privilege, then you can access and download only the attachments for export operations that were performed by you or by a member of your reporting hierarchy.

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