

ORACLE®

CRM ON DEMAND

Product Release Notes

Release 40

March 2020
VERSION 20200305



ORACLE®

Table of Contents

Document Versioning	3
Overview	4
Known Issues	4
Analytics	4
Analytics Picker Removes the Leading and Trailing Spaces from the Analytics Object Names	4
Assigning Visibility on Folders and Dashboards with Names Having Leading and Trailing Spaces	4
Export or Print to PDF for Custom Analyses with Narrative Views Containing HTML	4
Export to Excel 2007+ Date Format Is Using American Format	4
Export to Excel 2007+ Format Does not Respect User's Locale	4
Long Running Scheduled Analyses Fail Execution	5
Migration Tool	5
Usability	5
Customer Impact	5
Analytics	5
Advanced Tab in Analytics	5
Narrative Views Layout on Exported Analyses in Excel 2007+	5
Number (#) of Opportunity Team Members Metric in Opportunity Team Subject Areas Is not Translated in Other Languages other than English	5
Page Parameter and the Parameters Field in Oracle CRM On Demand Integrations	6
Pre-existing Scheduled Analytics Actions with Invalid Parameters Field	6
Reporting using Cross-Subject Areas and Set Operations	6



Team Role Field in Account Team History Subject Area	6
Team Role Field in Contact Team History Subject Area	6
Migration Tool	6
Language Support	7
Fixed Issues	8
Documentation	11
Online Help	11
Computer Telephony Integration Information	11
Topic: Web Services Integration	11
Topic: Configuring Analytics Visibility Settings	11
Topic: About Embedding Reports and Dashboards in Oracle CRM On Demand	11

Document Versioning

Date	Version	Change Reference
January 31, 2020	20200131	First draft published
March 5, 2020	20200305	Final version published

Overview

The Oracle CRM On Demand Release 40 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 have been fixed in this release.

To review the features included in this release, see *Oracle CRM On Demand Administrator Preview Guide* for Release 40, as well as the *Transfer of Information (TOI)* recording.

Known Issues

Analytics

Analytics Picker Removes the Leading and Trailing Spaces from the Analytics Object Names

The embedded analyses and dashboards that have leading or trailing spaces in their names fail to display because the Analytics picker at the configuration time removes the leading and trailing spaces from the analyses and dashboards original names and the Analytics objects cannot be found in the Catalog by the modified name. The issue has the same impact on Analytics objects that have leading or trailing spaces in their names and are scheduled via workflow scheduler with Analytics content. In scheduled workflows with Analytics content the error is reported in Workflow Error Monitor. Note that in Catalog, users cannot save analyses and dashboards with leading or trailing spaces, but they can rename such analyses and dashboards to names with leading and trailing spaces and this issue can occur.

Assigning Visibility on Folders and Dashboards with Names Having Leading and Trailing Spaces

An error is raised when users click on the folder or dashboard on which users assign visibility, if the folder or dashboard name has leading or trailing spaces. This issue was documented as a known issue in Release 39 and is not feasible to be fixed.

Export or Print to PDF for Custom Analyses with Narrative Views Containing HTML

Custom Analyses with Narrative Views containing HTML may look differently when exported or printed to PDF than when they are displayed in UI. The workaround for this issue is to print them using Printable HTML and then save them as PDF.

Export to Excel 2007+ Date Format Is Using American Format

The dates format in the analyses exported using Excel 2007+ format have the American format regardless the locale settings and the computer settings.

Export to Excel 2007+ Format Does not Respect User's Locale

The analyses and dashboards exported using Excel 2007+ format do not respect the user's locale format and the date, number and currency fields do not have the correct format. As a consequence of this issue, the analyses and dashboards with Excel 2007+ format which are attached to Emails sent by the workflow scheduler with Analytics content do not respect the user's locale either.

Long Running Scheduled Analyses Fail Execution

Scheduled analyses which require more than approximately six minutes to execute fail with the following error "The analytical data server is temporarily unavailable.". As part of the bug 30250654, a timeout setting from Oracle CRM On Demand was increased, to avoid the failure for analyses that take approximately four minutes to execute. This known issue is related to another timeout from the OBIEE platform. Users need to reduce complexity for such analyses to be able to execute them in less than six minutes and avoid the execution failure.

Migration Tool

Dependency to Page Layout Field Configurations is Not Prompted When Using the Graphical User Interface Based Migration Tool

When using the graphical user interface for the migration tool to migrate Page Layout Related Information or Page Layout Section configurations, but have not selected to also migrate Page Layout Field configurations, the tool is not prompting that Page Layout Field configurations is dependent and should also be migrated. Without migrating the Page Layout Field configuration and if there are configurations that are required from it, Page Layout Related Information and Page Layout Section migration may fail with errors. If errors are seen, the tool can be run again by first manually selecting to migrate the Page Layout Field configurations, along with Page Layout Related Information or Page Layout Section configurations.

Usability

Group Calendar Rendering Issues

In modern themes, the button bar from the group calendar view is a few pixels wider than the calendar grid width. In some modern themes, the calendar hours in group calendar view display underlined. Both issues will be resolved in a future release and do not affect calendar functionality.

Customer Impact

Analytics

Advanced Tab in Analytics

With Release 40, users with Manage Custom Reports or Manage Personal Reports privilege are going to see the new Advanced tab. The Advanced tab in the analysis editor shows the SQL code that is submitted to the Oracle BI server when the analysis is executed. If the user has the Cross-Subject Areas Analytics privilege, the user can enable the dimensionality variable in the SQL code by using the Advanced tab. When clicking the Advanced tab, users may notice a slight delay, until the information on the Advanced tab is displayed.

Narrative Views Layout on Exported Analyses in Excel 2007+

Before Release 39, when exporting analyses using the Excel 2007+ format, the Narrative views information was pushed to the left, instead of being centered with the information from other views on top or below the Narrative views, as displayed on the Results tab. In Release 39, a setting was changed so the information in Narrative views was displayed consistently with what is displayed on the Results tab but users noticed that the exported Excel file contains a big number of columns, significantly bigger than when the setting was at its V3 default value, prior to Release 39. Starting with Release 40, this setting is changed back to the value prior to Release 39.

Number (#) of Opportunity Team Members Metric in Opportunity Team Subject Areas Is not Translated in Other Languages other than English

Starting with Release 40, the Opportunity Team Subject Areas have a new metric Number (#) of Opportunity Team Members available under the Opportunity Team folder. In Release 40, the metric is not translated in all the

languages supported by Oracle CRM On Demand and is available only in English. With Release 41, the metric will be translated in all the languages supported by Oracle CRM On Demand.

Page Parameter and the Parameters Field in Oracle CRM On Demand Integrations

Starting with Release 40, the Parameters field from the setup pages for custom Web applets, Web tabs, Web links of type Report or Dashboard, or Send Email actions of the workflow scheduler with Analytics content is now validated, and users receive an error message if the Parameters field is incorrectly specified. The Page parameter is one of the valid parameters which can be used to specify the dashboard page to be displayed when a dashboard is embedded in custom Web applets, Web tabs, or when users navigate via Web links. The Page parameter cannot be used to specify which dashboard page is executed in Send Email actions of workflow scheduler with Analytics content and if a value is set for the Page parameter, the value is ignored. To schedule the execution of a dashboard page, users can use the Dashboard Page as Content Type and select the dashboard page from the Catalog using the Analytics picker.

Pre-existing Scheduled Analytics Actions with Invalid Parameters Field

Starting with Release 40, the Parameters field from the setup pages for custom Web applets, Web tabs, Web links of type Report or Dashboard, or Send Email actions of the workflow scheduler with Analytics content is now validated, and users receive an error message if the Parameters field is incorrectly specified. For these integrations, when the Parameters field is invalid, the error message has the following format: "Parameters field is specified incorrectly. <The actual reason for which the Parameters field is considered invalid>.". For pre-existing scheduled Analytics actions with invalid Parameters field, when the action is executed at runtime, the error message displayed in the Workflow Error Monitor is "Parameters field is specified incorrectly.". The actual reason for which the Parameters field is considered invalid cannot be displayed in Workflow Error Monitor. In order to see the actual reason, users can navigate to the workflow Send Email action that has the incorrect Parameters field and click on Save button.

Reporting using Cross-Subject Areas and Set Operations

Before Release 40, users could create combined analyses using multiple criteria and Set operations. In addition, with Release 40, users with Cross-Subject Areas Analytics privilege can create cross-subject areas analyses by selecting and adding related subject areas in addition to the primary subject area that was first selected when the analysis was first created. When the related subject areas are added to an analysis, they are displayed underneath the primary subject area in the Subject Areas pane. If users create a criteria using cross-subject areas and in addition they combine this initial criteria with one or more criteria using the Set operations, the Subject Areas pane no longer displays the related subject areas, only the primary subject area.

Team Role Field in Account Team History Subject Area

With Release 40, the Team Role field was relocated from Team Member folder to Account Team folder to insure consistency with the structure of the other team related subject areas.

Team Role Field in Contact Team History Subject Area

With Release 40, the Team Role field was relocated from Team Member folder to Contact Team folder to insure consistency with the structure of the other team related subject areas.

Migration Tool

Changes to the Oracle Migration Tool On Demand Package

With Release 40, the Oracle Migration Tool On Demand package contains both the command line-based as well as graphical user interface-based migration tool. There are two folders once the package is extracted:

- » "Windows" folder for Windows Operating systems. This is a self contained package with Java included. It is no longer necessary to install Java manually to the Windows operating system running the tool. There are two bat files in this folder, "MigrationTool.bat" for the command-line based migration tool and the "UIMigrationTool.bat" for the graphical user interface-based migration tool. Double click on the UIMigrationTool.bat file to launch the graphical user interface migration tool and use command line to run the command line migration tool.

» “Others” folder for non-windows Operating systems. This is not a self contained package and requires Java 8 or higher and JavaFX to be installed to the operating system running the tool. There are two subfolders in this folder, “MigrationTool” for the command line based migration tool and the “UIMigrationTool” for the graphical user interface based migration tool. Use the java installed to run the jars provided.

Note: There are no changes to how to use the command line based migration tool for Windows or other operating systems.

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 CRM On Demand Connected Mobile Sales for BlackBerry					✓			✓	✓									✓			
Oracle Offline On Demand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	
Oracle Notes Email Integration On Demand					✓																
Oracle Outlook Email Integration On Demand					✓																

* 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 40.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
30471442	Analytics	An analysis using the Event History subject area does not retrieve event records for which there is no event cost. The records that don't have event cost do not have exchange date, therefore the join with the exchange rate table cannot be made and the records are dropped.
30654878	Analytics	An analysis which is based on Advanced Custom Objects subject area and includes Custom Object 06 related fields, Custom Object 06 metrics and fields from Owned By User folder does not display all the Custom Object 06 records because these missing records have currencies for which there is no exchange rate setup.
30256232	Analytics	An analysis which is based on Events subject area and includes the number of Invitees metric and does not use any other fields from the other dimensions displays an incorrect value that does not consider the distinct number of invitees if an invitee is associated with more than one event.
30659464	Analytics	An analysis which is based on Opportunities and Partners subject area and includes the Comments field from the Opportunity Partner > Role folder returns an error.
28176691	Analytics	An analysis with comments inside the column formula errors out with the following error message "You do not have access privilege for this subject area".
29845099	Analytics	An error message is displayed when an analysis returning No Data is called via Reports Services API.
30466817	Analytics	Budget Surplus/Shortfall field from Event History subject area is missing the currency code. The format for Budget Surplus/Shortfall, Event Budget and Event Cost fields from Events subject area is missing two decimal places.
30450661	Analytics	Contact Team History does not respect team visibility regardless the Historical Subject Areas setting in company profile settings.
30063391	Analytics	Created Date UTC and Modified UTC fields are missing from Opportunity Product Revenue folder in Opportunity Product Revenues and Forecasts subject areas.
30466817	Analytics	Multiple optimized custom number fields 20 to 24 from multiple subject areas are formatted as percentages instead of numbers.
29681582	Analytics	Navigation to the next set of records in Manage Dashboard Visibility page errors out with the following error "The web content cannot be displayed. Please contact your system administrator."
30250654	Analytics	Scheduled analyses which require more than approximately four minutes to execute fail with the following error "The analytical data server is temporarily unavailable."
30079998	Analytics	Service Request metrics available from Service Request related subject areas do not use the correct label format and instead of using the plural version of the object name, the singular version is used. This behaviour is noticed only when the Administrator renames the Service Request object and then reverts back to the default object name.
22376870	Analytics	The custom percentage fields from Call Activity Metrics > Sample Request Custom Metrics folder in Call Activity History subject area are not formatted as percentages.

BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
30106513	Analytics	The custom percentage fields from Custom Percent folder, Owned By User Custom Fields and Custom Object Custom Metrics folders in Advanced Custom Objects subject area are not formatted as percentages for Custom Objects 04 to 25.
30895709	Analytics	The Opportunity History and Opportunity Team History subject areas have the custom field "- Opportunity Custom Attributes"."TEXT_76" mapped to the Opportunity ZText_75 in UI.
30040178	Analytics	When a double byte language is set, and a user without the Manage Custom Reports privilege tries to save a briefing book with a path containing multi-byte character(s) inside the Company Wide Shared Folder, the error message "An error occurred in the requested operation." is received instead of the correct one which is "Access denied for user to path <Path in Analytics Catalog>".
30091565	Analytics	When a user runs an analysis that includes Email fields for which the Data Format was overridden to be Mail-To address and the user clicks on the Email fields, Chrome displays "Requests to the server have been blocked by an extension."
30817909	Analytics	When exporting analyses using the Excel 2007+ format, the exported Excel file contains a bigger number of columns than seen on the Results tab.
26047039	BPM	An extra space is added in the subject of the email sent from a workflow.
29376887	BPM	Not able to view and edit the order of workflows via the Workflow Edit Order page.
30171149	BPM	Service Request assignment rules are triggered when conditions are not all met.
30263479	CRM	An error occurs on the Manage Attachment page.
29526519	CRM	The lookup window for the Distributor field on Opportunity takes a long time to load.
29592548	Customization	Error occurs where dynamic layout fails and field is incorrectly defaulted.
29047105	Customization	Page scrolls to the bottom of the page automatically on Custom Object 4 Create or Edit pages.
30109484	Desktop Integration	Unable to attach E-mails to Oracle CRM On Demand via OEI.
29769304	Migration Tool	An error returned when upserting workflows via Migration Tool.
13625605	UI/Usability	"Clear Current Value" button disappears on Theme popup window when navigating to last or first page.
28156029	UI/Usability	"Invalid User Input" would display under the Display Columns Section when there was an invalid filter when creating or refining a list.
13607098	UI/Usability	In the Role Management Wizard Step 1, selecting a theme by using last control on Theme pop-up window, Theme fields are not updated.
30536941	UI/Usability	Incorrect translation of 'Equal to' in Dutch causes running object list error out when 'Equal to' is used as searching condition.
19711012	UI/Usability	New user creation emails in Portuguese (Brazil) displays header information that shouldn't be exposed in the email message.
30356278	UI/Usability	Some multi-row inline edit operations take some time to complete without any indicator to the user that the operation is running successfully.
18620049	UI/Usability	Warning message is not proper when subject and Description fields are left blank while creating a new message using Message center from Action bar and pin icon from record details page title bar.



BUG NUMBER	PRODUCT AREA	DESCRIPTION OF BEHAVIOR PRIOR TO FIX
30044179	UI/Usability	When saving an invalid shared picklist field, a non-user friendly error message is displayed.
28915891	UI/Usability	When trying to convert leads, the conversion randomly fails.
17312951	UI/Usability	When trying to inline edit a custom field for an Account using a dynamic layout, a JavaScript error displays.
24521658	Web Service	Web Services are able to set any currency code in the system, including the ones that are not active for the customer.



Documentation

The following documentation errors or omissions exist in Release 40 and will be corrected in a subsequent update.

Online Help

Computer Telephony Integration Information

Information related to the CTI functionality, which was removed from the Online Help in Release 38, will be restored in the next release.

Topic: Web Services Integration

The following information is missing from this topic:

One of the WSDL files available from the Web Services Administration page is for the CTI Activity Web service, which is part of the computer telephony integration (CTI) Integration application programming interfaces (API). The CTI Integration API provides the ability to integrate Oracle CRM On Demand directly with third-party CTI software by using Web service integration. For more information about the CTI Integration API, see Oracle CRM On Demand CTI Developer's Guide.

Topic: Configuring Analytics Visibility Settings

The following information is missing from the field descriptions in this topic:

Reporting Subject Areas field. If you want to restrict visibility to records in real-time reports in Analytics, then you must select a value in this field.

Historical Subject Areas field. If you want to restrict visibility to records in historical reports in Analytics, then you must select a value in this field.

Topic: About Embedding Reports and Dashboards in Oracle CRM On Demand

The following information is missing from this topic:

If the Customized Code Enablement field in a user's profile is set to Disabled with Indicator, then any reports and dashboards that are embedded in custom Web applets do not run for that user.



Oracle Corporation, World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries
Phone: +1.650.506.7000
Fax: +1.650.506.7200

CONNECT WITH US

-  blogs.oracle.com/oracle
-  facebook.com/oracle
-  twitter.com/oracle
-  oracle.com

Integrated Cloud Applications & Platform Services

Copyright © 2020, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0305