



**Intelligent Workflow and Approvals on Salesforce
Winter 2017 Release Notes**

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Links in this Document

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About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#) that are required to upgrade to this release
- [System Requirements and Supported Platforms](#) information pertaining to the requirements and recommendations you must consider before you proceed with the installation
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features, with links to Get Started topics to help you set up and use the new feature or enhancement
- [Data Model Changes](#) from the previous major release
- [Resolved Issues](#)
- [Known Issues](#)



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Packages

The following packages and dependent packages are required to upgrade to this release. These are the *minimum* required versions; later versions are also supported. The packages marked as **(New)** are new packages for this release and must be installed to upgrade to this version .

Product	Latest Certified Version
Apttus Approvals Management (New)	8.0.0409 (8.409)
Apttus CPQ Approvals Management (New) (Required if you are using CPQ)	6.5.0068 (6.68)
Apttus Contract Management (Required if you are using CPQ and Agreement Approvals)	8.5.0354 (8.354)
Apttus Proposal Management (Required if you are using CPQ Approvals)	8.1.0128 (8.128)
Apttus Configuration & Pricing (New) (Required if you are using CPQ Approvals)	10.0.1215 (10.1215)
Apttus Quote/Proposal Configuration Integration (Required if you are using CPQ and Proposal management)	9.6.0182 (9.182)
Apttus Contract-Configuration Integration (Required if you are using CLM)	6.5.0062 (6.62)
Apttus Quote/Proposal Approvals Management (New) (Required if you are using Proposal Management)	6.5.0003 (6.3)

Product	Latest Certified Version
Apttus Custom Approvals Management (Required if you are using Apttus Objects or other Salesforce Standard/Custom Objects)	1.0

System Requirements and Supported Platforms

Before you install and start using Intelligent Workflow and Approvals (IWA) on Salesforce Platform, you must ensure the minimum requirements as mentioned below:

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .
Browser	Apttus supports the following browsers: <ul style="list-style-type: none">• Mozilla Firefox• Google Chrome Note: Internet Explorer is not supported.
Microsoft Office	<ul style="list-style-type: none">• Microsoft Word 2003 with Service Pack 3• Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number has to be greater than 12.0.6520.4999)• Microsoft Word 2010 (32 bit & 64 bit)

Feature Summary

This release introduces the following updates to Intelligent Workflow and Approvals on Salesforce Platform:

- [Attaching documents while submitting Approval Requests](#)

Attaching documents while submitting Approval Requests

You can browse and attach external documents from your local machine for **Submit with Attachments** action on Preview approvals page. This eliminates your effort to attach the required documents in Notes & Attachments related list of your object record before submitting the record for approval. To enable this functionality, the system administrator must set the **Approval System Properties > Enable Upload Attachment From Desktop** custom setting to *true*.

Get Started

For details, refer to [Approval System Properties](#) in the admin guide.

Data Model Changes

The following table lists the data model changes from the Spring 2017 Patch 1 release to Winter 2017 release.



The System/User column in the following table indicates whether the field is used by the System only (System), or if the field may be used for integration updates (User).

Object	Fields	Description	State	Feature	System /User
Approval Request		Designates an approval request created from an approval process.	Existing		
	Object Ref Id	ID of the business object associated with the request.	New		System
	Child Object Reference Id	ID of the child object associated with the request.	New		System



In case you are using a custom code to query the Approval Request object that uses the Object_Id__c or ChildObjectId__c in the where clause, you must replace it with the new indexed fields ObjectRefId__c and ChildObjectRefId__c.

Resolved Issues

The following table represents resolved issues in the IWA on Salesforce Platform Winter 2017 release.

Case Number	Description	Apttus Internal ID
IWA 8.409		
211983	<p>You could not change the user in an existing Backup/Delegate approver.</p> <p>This issue is now resolved. You can change the user configured in an existing Backup/Delegate approver.</p>	AWA-1666
215564	<p>An approval request that was approved or rejected via email did not register the status in the system. This behavior was observed with an email template containing more than 10,000 characters and rich text fields.</p> <p>This issue is now resolved.</p>	AWA-1707

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Case Number	Description	Apttus Internal ID
216149	<p>For a reassigned approval request, the system allowed any user to approve the request even if that user is not configured as an assignee in an approval step.</p> <p>This issue is now resolved. Standard users can reassign the approval requests assigned to or owned by them. Super Admin user can reassign any approval request.</p>	AWA-1711
216448	<p>When a user reassigned an approval request to self and try to approve, the system displayed an exception.</p> <p>Issue resolved. Two new fields are introduced to the approval request object to prevent this exception from occurring when querying on large numbers of approval requests. These new external ID fields, ObjectRefId__c and ChildObjectRefId__c are indexed copies of the Object_Id__c and ChildObjectId__c fields. See data model change section above.</p>	AWA-1713

Known Issues

The following table represents known issues in the IWA on Salesforce Platform Winter 2017 release.

Apttus Internal ID	Description
AWA-1368	When the same user is assigned as a Backup Admin to an approver and as a parallel Ad hoc approver, the approval request is shown in both the My Approvals tab as well as in the Take Ownership tab.
AWA-1603	All Delegate approvers are displayed for requests assigned to Queue and Roles.
AWA-1605	Approval Request page is distorted when multiple Delegate IDs are stored in the Delegate Approvers Field.
AWA-1651	When you approve 41 requests simultaneously from the My Approvals page, the approval request takes time and the page hangs.
AWA-1722	For a parallel approval scenario, rejecting an approved request does not send cancellation email notification to other assignees.

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