



**APTTUS<sup>®</sup>**

## **Intelligent Workflow Approvals on Salesforce Summer 2019 Release**

### **Notes**

07/30/2019

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## About Release Notes

Apttus Release Notes contain the following information about Intelligent Workflow Approvals Summer 2019 Release on Salesforce.

For more information on new features, enhancements, and document improvements refer to

- [What's new](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide* or
- [What's new](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 SOAP API Reference Guide*

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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## Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>Version Name / Version Number</i>
Apttus Approvals Management <b>(New)</b>	10.1.0046   10.46
Apttus CPQ Approvals Management <b>(New)</b> (Required if you are using CPQ)	10.1.0014   10.14
Apttus Contract Management <b>(New)</b> (Required if you are using CPQ and Agreement Approvals)	10.0.0444.1   10.444.1
Apttus Proposal Management (Required if you are using CPQ Approvals)	8.5.0177   8.177
Apttus Configuration & Pricing <b>(New)</b> (Required if you are using CPQ Approvals)	11.0.1552   11.1552
Apttus Quote/Proposal Configuration Integration (Required if you are using CPQ and Proposal management)	10.2.0263   10.263
Apttus Contract-Configuration Integration (Required if you are using CLM)	10.1.0103   10.103
Apttus Quote/Proposal Approvals Management <b>(New)</b> (Required if you are using Proposal Management)	6.5.0004   6.4
Apttus Custom Approvals Management (Required if you are using Apttus Objects or other Salesforce Standard/Custom Objects)	1.0

## System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Intelligent Workflow Approvals.

System Requirement	Minimum Supported Version
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See <a href="#">Salesforce PDF</a> .
Browser	<p>Apttus supports the following browsers:</p> <ul style="list-style-type: none"> <li>• Microsoft Edge</li> <li>• Google Chrome</li> </ul> <p>Apttus recommends the latest version of the browser for the best performance. Apttus also recommends its customers to use Microsoft Edge as the browser of choice.</p> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> Internet Explorer is not supported.</p> </div>
Microsoft Office	<ul style="list-style-type: none"> <li>• Microsoft Word 2007 with Service Pack 2 plus hotfix package 976477 (Word 2007 version number has to be greater than 12.0.6520.4999)</li> <li>• Microsoft Word 2010 (32 bit &amp; 64 bit)</li> </ul> <div style="border: 1px solid #6c757d; padding: 5px; margin-top: 10px;"> <p> Apttus recommends usage of the latest Microsoft Office Suite for the best performance.</p> </div>

### Upgrade Notes

For more information on the prerequisites and post-upgrade tasks, see [Upgrade Information](#) in Intelligent Workflow Approvals Administrator Guide.

## New Features

The following features are new to Intelligent Workflow Approvals in this release.

- [Reassigning an Approval Request to User Group, Queue or Role](#)
- [Setting Up a Backup or Delegate for Out-Of-Office](#)
- [Ability to Auto-Complete Standard Approval Steps and Sub Process Steps](#)
- [Ability to Make Comments Mandatory or Optional for Submission, Approval, and Rejection Action](#)

### Reassigning an Approval Request to User Group, Queue or Role

With this release, you can reassign an Approval Request to a User, Queue or Role. You can further customize the out-of-the-box behavior by overriding the Approval System Properties to filter list of users, queues, and roles from the reassign user page accessed by the Reassign link from the Approval Requests related list, and by overriding the DefaultQueryCallback class used to filter users, queues and roles from the Reassign and Add Approver icons on the My Approvals page.

To override the default behavior, from the Approval System Properties, in the **Reassign Filter Page** custom setting specify the name of the visual force page that lets users select from a filtered list of users, queues, and roles.

To specify the custom reassign user search, do the following:

1. Go to **Setup > Develop > Custom Settings** and click **Manage** for Approval System Properties.
2. In **Reassign Filter Page** specify the name of the visual force page.
3. Click **Save**.

#### Get Started

For details on how to customize the reassign user search page, refer to [Custom Query Callback for Reassigning and Adding Approver](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

### Setting Up a Backup or Delegate for Out-Of-Office

As an approver, you can now easily set up your Out-Of-Office for all your approval requests when you are on leave or set up a backup or delegate when you are Out-Of-Office. You can select a time frame as well as assign someone to receive your notifications, approvals and general tasks.

**Get Started**

For details on setting up backup or delegate for Out-of-Office, refer to [Setting Up a Backup or Delegate for Out-Of-Office](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Ability to Auto-Complete Standard Approval Steps and Sub Process Steps

A new flag named Step Auto Complete has been introduced to enforce auto-completion of a Standard Step and sub process step. You can set up any or all standard steps in an Approval Process for auto-completion.

**Get Started**

For details on configuring auto-complete standard approval steps, refer to [Creating Approval Steps](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Ability to Make Comments Mandatory or Optional for Submission, Approval, and Rejection Action

With this release, you can make comments mandatory or optional for Submission, Approval, and Rejection action.

**Step 7: Specify Comment Settings** Previous Save Cancel

Submission comments are comments made by the person submitting the request at runtime. The user can enter a comment that applies to the entire process when the request is submitted. For each step that step comments are enabled for when the request is submitted for a step, the label and cannot contain spaces. At runtime the value in the custom labels is resolved at the header level but can be enabled for each step individually. See the user guide for more information.

**Submission Comments**

Submission Comments Enabled

**Approval Comments**

Approval Comments Mandatory

**Rejection Comments**

Rejection Comments Mandatory

### Get Started

For details on making comments mandatory or optional, refer to [Creating the Process Definition](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.



## Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

- [Reassigning an Approval Request to User Group, Queue or Role](#)
- [Setting Up a Backup or Delegate for Out-Of-Office](#)
- [Ability to Auto-Complete Standard Approval Steps and Sub Process Steps](#)
- [Ability to Make Comments Mandatory or Optional for Submission, Approval, and Rejection Action](#)

### Tool Tip Help Text for Backup Delegate Page

Meaningful tool tip provides help text for Backup/Delegate functions explaining the impact. At times, an Approver or Administrator may not realize the impact of setting up and activating Backup/Delegates. In order to alert the users (during the setup of records), these tool tips display help text when the user hovers over the help text icon or hint icon.

#### Important

After installing Summer 2019 version, you must edit the Backup/Delegate Approver object and copy the contents of the Description field to the Help Text field for every field in the Backup/Delegate Approver object.

Field	Help Text
Is Delegate	If unchecked, requests assigned to the current user get assigned to the backup instead. When checked, requests assigned to the current user remain assigned to them but their delegates are notified and can take action on the requests as well.
Comment	Enter a comment to the person you are setting as your backup/ delegate.
Transfer-in-flight	All in-flight and pending approval requests will be directed to the person designated as backup/delegate.
Is Active	When checked this means this backup/delegate is active but not necessarily in effect. A backup/delegate can be active, in effect, or both. In order for requests to be actively assigned to the backup/ delegate they must be active and in effect.
In Effect	When checked this means this backup/delegate is in effect. A backup/ delegate can be active, in effect, or both. In order for requests to be actively assigned to the backup/delegate they must be active and in effect.

Field	Help Text
Effective Date	Please enter an effective date only if you are not activating it immediately. Otherwise use the Activate button on the next screen to Activate Backup immediately.
Expiration Date	Please enter an expiration date only if you need the system to expire it automatically at a future date. Otherwise use the Deactivate button on the next screen to cancel the backup immediately.
Cancellation Date	The date on which approval requests will stop getting assigned to the backup/delegate.
Current User	The user for whom the backup or delegate approver applies.
Suppress Delegate Notification	Indicator to enable/disable notification to Delegate Approver.

**Get Started**

For details on the tool tip help text, refer to [Setting Up Backup and Delegate Approvers](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Ability to set up multiple entries of reminders and consolidation of emails

You can now set up multiple entries of Reminders in a standard approval step or a approval rule step. There is no restriction on how many reminder records you can create. You can even approve or reject a request from the reminder email.

If the email consolidation is enabled, the Reminder emails along with the Escalation emails are sent to the user.

**Get Started**

For details on setting up multiple reminders, refer to [Creating Approval Steps](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Ability to configure and support Reminder email template

Similar to email templates provided for Approval Assignment, Reassignment, Cancellation, Escalation and Notifications, a new email template is introduced for 'Reminder' emails. Although this email template is provided out of the box, you can clone and configure the email template as per your requirement and associate it to your reminder email.

**Step 4: Select Custom Notification Templates** Previous Next Save Cancel

Select email templates that will be used to notify approvers that an approval request has been assigned to them. Note that you can also select a template to notify a person that an approval request has been submitted but does not require them to take action. Note that you cannot select a template that is already selected for another step.

**Notification Templates**

Assignment Email Template	Apttus Cart Approval Notification (Assignment)	
Reassignment Email Template	Apttus My Approvals Notification (Reassignment)	
Escalation Email Template	Apttus My Approvals Notification (Escalation)	
Cancellation Email Template	Apttus My Approvals Notification (Cancellation)	
NotifyOnly Email Template	Apttus My Approvals Notification (Notify Only)	
Reminder Email Template	Apttus My Approvals Notification (Reminder)	

### Get Started

For details on email templates, refer to [Approval Email Notification Templates](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Ability to add/configure Approval Rule Entry Assignee level description and display it on My Approvals page

Previously, there was no way to provide a description on the Approval rule entry assignee level. With this release, This enhancement displays specific messaging on the My approvals page. The roles of users is displayed clearly stating the role of the approval assignee.

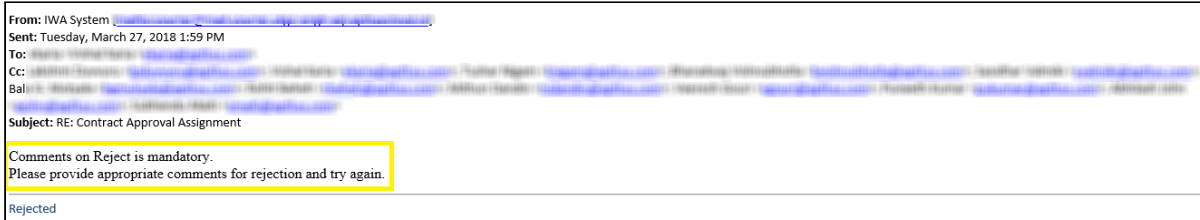
Step Label	Sub-Sequence	Status	Assigned To	Delegate Approver(s)	Approval Details	Approval History
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	1	Assigned	David Freifeld		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	2	Not Submitted	Ed Beaurain		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	3	Not Submitted	Nicholas VanBuskirk		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	4	Not Submitted	Chris Pearce		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	5	Not Submitted	Josh Vitello		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	
20% <Discount % <= 100% and Pricing Category Services and for SAM/ESAM/AM	6	Not Submitted	Lynn Smith		(Manual Adjustment % > 20) AND (Manual Adjustment % <= 100) AND (Normalize role IN Sales Area Manager,ESAM,Account Manager) AND (Pricing Category = Services)AND (Product Code IN Services)	

### Get Started

For details on configuring approval rule entry assignee level description, refer to [Approval and My Approval Pages](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Email Validation for Approval Comment Mandatory and Rejection Comment Mandatory

When Approval Comment Mandatory or Rejection Comment Mandatory flag is true in an Approval process, approving or rejecting any approval request via email without a comment bounces back emails.



### Get Started

For details on the mandatory flags, refer to [Configuring Intelligent Workflow and Approvals for Agreement and related Objects](#) in *Intelligent Workflow Approvals on Salesforce Summer 2019 Administrator Guide*.

## Data Model Changes

This release does not have any data model changes for Intelligent Workflow Approvals.

## Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
CAS-15332-M4R4M9	AWA-1972	Approval step was not routing as expected. It was getting assigned to both user and queue.
N/A	AWA-1963	Returning to cart from the Preview Approvals page displayed an error on the Agreement.
N/A	AWA-1916	Activating a process added it to the top of active process list with blank sequence number instead of displaying at the bottom of the list.
CAS-12211-M3F3B5	AWA-1914	Approval request went to different approver levels simultaneously even if the multi level approvals were configured in Approval Rule and dependency was also configured between different levels.
N/A	AWA-1833	Approval request was not getting reassigned from the Approval related list on the Opportunity object.
CAS-03980-F1R9J3	AWA-1815	Submit with attachment was not working with browse functionality.
N/A	AWA-835	Clicking the Approve action directed you to the product configuration page instead of the Approvals Request page.

## Known Issues

The following table provides the cumulative list of known issues up to this release.

Apttus Internal ID	Issue
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-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.

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