

APTTUS[®]

Intelligent Workflow and Approvals on Salesforce Spring 2018

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
- [Upgrade Information](#) that is required to upgrade to this release.
- [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)	9.0.0001 (9.1)
Apttus CPQ Approvals Management (New) (Required if you are using CPQ)	9.0.0000 (9.0)
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 (Required if you are using Proposal Management)	6.5.0003 (6.3)
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 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	<p>Apttus supports the following browsers:</p> <ul style="list-style-type: none"> • Google Chrome™ • Microsoft Edge™ - Apttus recommends its customers to use “Edge” as the Microsoft browser of choice. • Mozilla Firefox™ <p>Note: Internet Explorer is not supported.</p>
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) • Apttus recommends usage of the latest Microsoft Office Suite for the best performance.

Upgrade Information

Auto-Approval is not supported in an assigned approval rule. If you are upgrading from an older version to Spring 2018 version, you must manually remove the **Auto-Approval** picklist option from the **Approval Rule Assignee** object (Apttus_Approval__ApprovalRuleAssignee__c) > **Assignee Type** field (Apttus_Approval__AssigneeType__c). When you upgrade to Spring 2018 from an older version, the Auto-Approval picklist is not removed automatically.

New users who install Spring 2018 version will not see the Auto-Approval picklist.

Before you upgrade, it is important that you know about all of the changes that have occurred between your existing release and the release you are upgrading to. To be sure you have all the information you need, refer the release notes for all intermediate releases. Go to [Intelligent Workflow Approvals](#) and click to expand the Show All Releases section.

Feature Summary

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

- [Apttus Intelligent Workflow and Approvals Now Available on Salesforce Lightning](#)
- [Support Added for Salesforce Files in Lightning Mode](#)

Apttus Intelligent Workflow and Approvals Now Available on Salesforce Lightning

With this release, Apttus has now enabled Apttus Intelligent Workflow and Approvals on Salesforce Lightning. This enablement does not affect any functioning on the Classic and Mobile and Desktop mode. All the functions of the Intelligent Workflow and Approvals including buttons, actions and more are available in Lightning mode.

Support Added for Salesforce Files in Lightning Mode

A new Approvals Custom Config setting "Use Files Instead of Notes & Attachments" is introduced with this release. When enabled, the approvals engine works with attachments from Salesforce Files attached or uploaded from the desktop for the context object instead of those from the old Notes & Attachments related list. You need to enable or disable this new custom setting independently for each object used for approvals. If a custom setting for a context object is not found, the system will default to working with files from the Notes & Attachments related list for the content object. Customers using Apttus CLM will need to enable this setting for the Apttus__APTS_Agreement__c, Apttus__Agreement_Clause__c or whatever agreement related objects they are using approvals with. CPQ customers will need to enable this setting for Apttus_Config2__ProductConfiguration__c or quote proposal objects.

Get Started

For details, see [Submitting a request with Attachments](#).

Data Model Changes

This release does not entail any changes to the Data Model.

Resolved Issues

The following table represents resolved issues on the IWA Salesforce Spring 2018 release.

Case Number	Description	Apttus Internal ID
CAS-01609-V8Q3N7	<p>Upon approver approving a record, the record got approved but the approver received an email with "Attempt to de-reference a null object" error.</p> <p>This issue is now resolved. When the approval record is approved, the approver now receives an approved email.</p>	AWA-1755
NA	<p>Trying to approve multiple approval requests generated from an approval rule of type child process approval step, the last request was not auto-approved.</p> <p>This issue is now resolved.</p>	AWA-1761
NA	<p>Clicking the Preview or Submit button for an Agreement record with child process step displayed an error.</p> <p>Issue resolved. You can preview and submit an Agreement record with its child process step.</p>	AWA-1786
NA	<p>Click the Approve/Reject or Add Comment link for an approval request link displayed an error.</p> <p>Issue resolved. Now, when you click the Approve/Reject or the Add Comment link for an approval request link from the action column, the action is executed successfully.</p>	AWA-1789
NA	<p>When entering assignees for an approval rule entry (whether a user, role, queue, related user or any other assignee type), the system allowed blank assignee value.</p> <p>This issue is now resolved. The system will now check and ensure that assignee values are not left blank before approval rule entries are saved.</p>	AWA-1795

Known Issues

The following table represents known issues on the IWA Salesforce Platform Spring 2018 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.

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