



Intelligent Workflow Approvals on Salesforce Winter 2019

Release Notes

12/03/2019

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About Release Notes

Apttus Release Notes contain the following information about Intelligent Workflow Approvals Winter 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 Winter 2019 Administrator Guide* or
- [What's new](#) in *Intelligent Workflow Approvals on Salesforce Winter 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 (New) | 10.2.0077 10.77 |
| Apttus CPQ Approvals Management (New) (Required if you are using CPQ) | 10.2.0015 10.15 |
| Apttus Contract Management (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 (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 (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 Salesforce.com requirements. See Salesforce PDF . |
| Browser | <p>Apttus supports the following browsers:</p> <ul style="list-style-type: none"> • Microsoft Edge • Google Chrome <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"> • 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) <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.

- [Setting Up an Adhoc Approval Process From The Admin Page](#)
- [Setting Up an Adhoc Approval Process in Runtime](#)
- [Carbon Copy \(CC\) for Each Approval Step](#)
- [Creating Multiple Entries for Backup/Delegate Records](#)
- [Removing Adhoc Approver from the My Approvals Page](#)
- [New APIs for Setting Up Adhoc Approval Process in Runtime](#)
- [New APIs for Adding Comments and Attachments to Existing Adhoc Approval Process in Runtime](#)

Setting Up an Adhoc Approval Process From The Admin Page

You can now set up an adhoc approval process from the Admin page.

New Approval Process
Opportunity (Step 1 of 7)

Step 1: Step Information Next Cancel

Create a new rule-based or Adhoc process. You also need to enter a name and description for your new approval process.

Process Type

Rule Driven Process
 Adhoc Process

Step Information

Business Object: Opportunity
Process Name:
Description:

Get Started

For details on how to set up an adhoc process, refer to [Creating an Approval Process](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.

Setting Up an Adhoc Approval Process in Runtime

With this release, you can create or modify an adhoc approval process in runtime. You can also perform the following:

- Configure adhoc approvers, parallel or sequential, save and preview all at the same time on the Preview Submit Approval page
- Preview and save all approval requests with comments and attachments
- Select User, Role, or Queue assignee types

- Add optional comment for adhoc approval process
- Add optional attachment for an adhoc approval process
- Switch from Rule Based Approval Process to Adhoc Approval Process
- Submit all adhoc approval requests
- Provides new APIs to preview, submit, create and maintain runtime adhoc approval processes

Get Started

For details on how to preview and save all approval requests, refer to [Setting Up An Adhoc Approval Process in Runtime](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.


For details on these new API's, refer to [What's New](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 SOAP API Guide*.

Carbon Copy (CC) for Each Approval Step

You can now select CC (carbon copy) assignees who are copied on email notifications for all approval requests assigned for each Approval Step.

The screenshot shows the 'Edit Approval Process Step' interface. At the top, there is a header 'Edit Approval Process Step' and a sub-header 'Approval'. Below this, the section is titled 'Step 10: Carbon Copy Assignees'. There are three buttons: 'Previous', 'Save', and 'Cancel'. Below the title, there is a descriptive text: 'Select carbon copy assignees who get copied on notifications for all approval requests assigned in this step.' At the bottom, there is a search bar with a dropdown menu labeled 'User', a search icon, and an 'Add Assignee' button.

The CC assignees are set up from a new section Carbon Copy Assignees on the Approval Process Step level regardless of the approval step type. This works for standard, sub-process, and child process. CC can be a Named User. A CC assignee is only copied on email notifications, they cannot approve a request by replying to the email. Their reply email is bounced back. In case of consolidation, CCs from all request are concatenated.

 Custom Users and Queues are not supported in this release.

Get Started

For details on defining the carbon copy assignee, refer to [Creating Approval Steps](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.

Creating Multiple Entries for Backup/Delegate Records

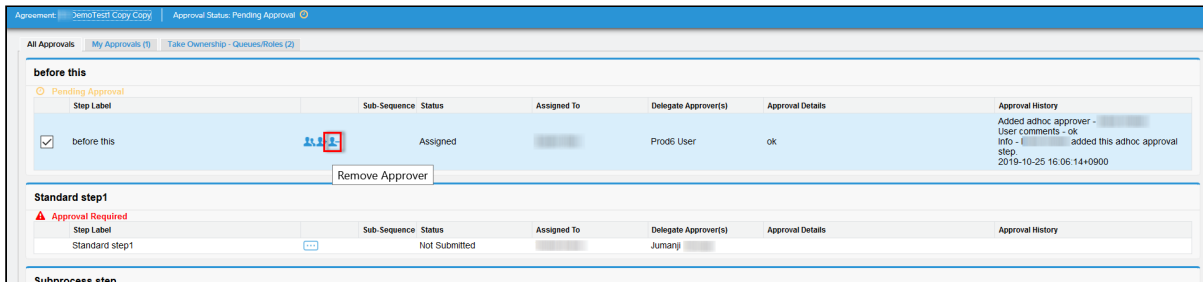
With this release, you can now create multiple entries for Backup/Delegate records. At a time, only one record is active. Also you can create multiple entries for Backup/Delegate records for different date ranges, as long as the date ranges are non-overlapping. All approval requests are routed to the designated Backup/Delegates during the activated time period(s).

Get Started

For details on creating multiple entries for Backup/Delegate records, refer to [Setting up Backup or Delegate Approvers](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.

Removing Adhoc Approver from the My Approvals Page

Previously, after submitting an approval request, if an adhoc approver was added, there was no way to remove the added adhoc approver except recalling the request and then remove the adhoc approver. With this release, you can remove an adhoc approver from My Approvals page directly for Standard and Sub-process steps.



Get Started

For details on removing the adhoc approver from a submitted approval request, refer to [Approvals and My Approval Pages](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.

New APIs for Setting Up Adhoc Approval Process in Runtime

Four new API's are introduced to allow users to create, update, read and delete adhoc approval process runtime definitions along with adhoc approval groups and their respective adhoc approvers.

- CreateRuntimeAdhocApprovalProcess
- UpdateRuntimeAdhocApprovalProcess
- GetRuntimeAdhocApprovalProcess
- DeleteRuntimeAdhocApprovalProcess

Get Started

For details on these new API's, refer to [What's New](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 SOAP API Guide*.

New APIs for Adding Comments and Attachments to Existing Adhoc Approval Process in Runtime

Three new API's are introduced for adding comments and attachments to existing Adhoc Approval Process runtime instances.

- AddCommentToRuntimeAdhocApprovalProcess
- AddAttachmentsToRuntimeAdhocApprovalProcess
- DeleteAttachmentsFromRuntimeAdhocApprovalProcess

Get Started

For details on these new API's, refer to [What's New](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 SOAP API Guide*.

Enhancements

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

- [Cancellation Email Sent for Approved or Notified Requests](#)

Cancellation Email Sent for Approved or Notified Requests

In case of large number of approval requests, where a few approval requests were approved and few were notified, upon recall or reject of the approval request, cancellation email was sent to only remaining assigned approvers.


A new system property "Cancellation Email to Approved/Notified" flag is introduced. When set to true, cancellation email is sent for approved or notified requests upon recall. When set to false, no emails are sent for Approved/Notified requests.

Get Started

For details on the custom setting, refer to [Approval System Properties](#) in *Intelligent Workflow Approvals on Salesforce Winter 2019 Administrator Guide*.

Data Model Changes

The following objects and fields are introduced to or changed in the system or data model in this release.

 The System/User indicates whether the field is used by the System only (System), or if the field may be used for integration updates (User). The below given all fields are consumed by Users and updated by System.

| Object | Fields | Description | System/ User | New/ Changed |
|---------------------------|---------------------------------------|---|-----------------|-----------------|
| Approval Process | | Designates an approval process defined in the system. | | Changed |
| | Adhoc Auto Reapproval Status Label | Approval status is set to this value when a request is auto-reapproved by the system. | User | New |
| | Adhoc Step Auto Reapprove | Setting this flag to True enables auto-reapproval for an adhoc process. | User | New |
| | Allow Approved Requests To Be Deleted | Setting this flag to True, the system deletes approved requests. | User | New |
| | Is Adhoc | This flag is true if this process definition is for an Adhoc approval process. | User | New |
| | Original Instance Process | Reference to original process definition that is associated with Approval Requests | User | New |
| | Step Carbon Copy Assignee Ids | Contains a list of user ids that should receive carbon copy notifications along with assigned approvers for a request associated with a given step. | User | New |
| | Step Carbon Copy User | | User | New |
| Approval Process Instance | | Represents an instance of a single, end-to-end approval process. | | Changed |

| Object | Fields | Description | System/ User | New/ Changed |
|--------------------------|----------------------------------|--|-----------------|-----------------|
| | Original Parent Approval Process | Holds reference to the original process definition id. | User | New |
| Approval Request | | Designates an approval request created from an approval process. | | Changed |
| | Carbon Copy Assignee Ids | Contains a list of user ids that should receive carbon copy notifications along with assigned approvers for a given request. | User | New |
| | Is Adhoc Process | Indicates whether this request is associated with an Adhoc Process. | User | New |
| Approval Request History | | | | Changed |
| | Carbon Copy Assignee Ids | Contains a list of user ids that should receive carbon copy notifications along with assigned approvers for a given request. | User | New |
| | Is Adhoc Process | Indicates whether this request is associated with an Adhoc Process. | User | New |
| Adhoc Approval Process | | Defines adhoc approval process information for a specific business object. | | New |
| | Attachment Ids | Contains a list of attachment ids associated with the adhoc approval process. | User | New |
| | Business Object Id | The Id of the business object associated with this adhoc process. | User | New |
| | Business Object Type | The Type of the business object associated with this adhoc process. | User | New |
| | Display Fields | The API names of the fields to display for the step. | User | New |

| Object | Fields | Description | System/ User | New/ Changed |
|----------------------|---------------------------|--|-----------------|-----------------|
| | Display Header Fields | The API name of the header field to display for the step. | User | New |
| | Process Comments | The submission comments associated with this adhoc process. | User | New |
| Adhoc Approval Group | | Defines groups of approvers for an adhoc approval process. | | New |
| | Adhoc Approval Process Id | The Id of the approval process containing this approval group. | User | New |
| | Depends On | The group sequence number this group step depends on. | User | New |
| | Group Name | The name of this group. | User | New |
| | Group Sequence | The sequence of this group. | User | New |
| Adhoc Approver | | Defines approvers for an adhoc approval group. | | New |
| | Adhoc Approval Group Id | The Id of the approval process group containing this approver. | User | New |
| | Approver Sequence | The sequence for this approver. | User | New |
| | Assignee Id | The Id of the approver. | User | New |
| | Assignee Value | The name of the approver. | User | New |
| | Assignee Type | The type of the approver. | User | New |
| | Auto Reapproval Enabled | Flag indicating whether or not auto-reapprovals should be enabled for this approver. | User | New |
| | Depends On | The approver sequence number this approver depends on. | User | New |
| | Is Reviewer | Flag indicating if this approver is a reviewer or gets the request assigned to them. | User | New |
| | Send Email | Flag indicating if an email should be sent to the approver when the request is submitted for approval. | User | New |

Resolved Issues

The following table lists the issues resolved in this release.

| Case Number | Apttus Internal ID | Description |
|------------------|--------------------|---|
| CAS-16805-L8J3D6 | AWA-2022 | Submitting an approval process on opportunity object displays an error. |
| CAS-15124-F5R8P9 | AWA-1970 | Submitting more than one proposal together triggering same approval process displays an error for one of the process. |
| CAS-15358-H7C5X8 | AWA-1994 | After switching from Attachments to Files, documents were not attached to the approval request emails. |

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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