

# Release Guide-CQ\_BB\_1.0.0



## Release Guide

CQ BB 1.0.0

Release Date:

First major release of CQ Beta Bionics Configuration.  
Contains changes on DTC module.

### Release Links

#### Release Guide Wiki

<https://ambarkaar.atlassian.net/wiki/spaces/BB/pages/452921772/Release+Guide-CQ+BB+1.0.0>

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#### Unlocked Package Url

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1U000006ZjWRQA0>

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#### External Release Package (git Tag)

<https://Link-will-be-available-after-code-merge>

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### Release Note Description

#### Package Information

ID	08c1U000000CabHQA0
Status	Success
Package Id	0Ho1U000000GmdmSAC
Package Version Id	05i1U000000CaYmQAK
Subscriber Package Version Id	04t1U000006ZjWRQA0

Tag	
Branch	
Created Date	2019-03-08 15:03
Installation URL	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1U000006ZjWRQA0
KEY	CQBB

#### Packaging Org Information

Dev Hub Org	CQ Config Packaging (cqconfigpackaging)
Dev Hub Org ID	00D1U000000r64I

**Package Test Org**  
SBPkgBB

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## Release Items

This section contains the items that are included in the release.

Key	Summary	Status	Linked Issues
BB-12	Configure Document Profile Fields	RESOLVED	
BB-15	Configure Emails - Change Management	RESOLVED	
BB-16	Configure New Change Order Process Flow	RESOLVED	
BB-17	Configure Change Profile Fields	RESOLVED	
BB-18	Configure & Package Change Resolutions	RESOLVED	
BB-19	Create Local Engineering Development Org with V7.4.7	DONE	
BB-20	Approvers not displaying Correctly on Controlled Documents	RESOLVED	
BB-21	Secondary Content Profile page displays incorrect Approvers	RESOLVED	
BB-22	Remove Take Ownership Button for Change Order	RESOLVED	
BB-27	Add New Personnel Fields	RESOLVED	
BB-29	Course Record Default Libraries	RESOLVED	
BB-30	Document Type Field Required	RESOLVED	
BB-31	Modify Buttons in Controlled Documents/Templates	RESOLVED	
BB-32	Configure Auto Document Numbering Schemes	RESOLVED	
BB-33	Doc Management Permission Set	RESOLVED	
BB-34	Deploy CD's to BB Sandbox	DONE	
BB-35	Upgrade Production to 7.4.7	DONE	
BB-36	Configure/Package Document Categories	IN CODE REVIEW	
BB-37	Related Parts	RESOLVED	
BB-40	Create Final Package	IN REVIEW	BB-41

## Deployment Notes

### Pre-deployment Steps

#### 1. Default Libraries

Make sure default course and controlled document libraries are present in the org.

#### 2. **BB-13** **APPROVED AND READY FOR CLIENT ORG** Configure and Package eSig Settings - Document Management

##### A. Esig Settings : Creating the Connected App

-Go to Setup -> Apps

-Click New under Connected Apps section

-Fill in the values as follows:

<b>Connected App Name</b>	CQ Electronic Signature
<b>API Name</b>	SQX_CQ_Electronic_Signature
<b>Contact Email</b>	Email of Admin
<b>Enable OAuth Settings</b>	Checked
<b>Callback URL</b>	Base URL of deploying org

-Selected OAuth Scopes: Access your basic information (id, profile, email, address, phone)

-Click on Save and then continue.

-Click Manage on Connected App Name 'CQ Electronic Signature'.

-Click Edit Policies.

-Select IP Relaxation = Relax IP restrictions.

-Click Save.

##### B. Esig Settings : Setting up Electronic Signature in CQ Admin app

-From the Apps menu, switch to CQ Admin app.

-Click on the tab eSig Setting.

-Click Edit.

-Fill in the values as shown below:

-Consumer Key: Consumer key from the connected app 'CQ Electronic Signature'.

-Consumer Secret: Consumer secret from the connected app 'CQ Electronic Signature'.

-Ask UserName and Enabled depends upon the setting required for organization.

-Enter required field value under Sign-Off Signature section.

-Click Save.

#### 3. **BB-14** **APPROVED AND READY FOR CLIENT ORG** Configure and Package eSig Settings - Change Management

##### A. Setting up Electronic Signature in CQ Admin app

-From the Apps menu, switch to CQ Admin app.

-Click on the tab eSig Setting.

-Click Edit.

-Fill in the values as shown below:

<b>Submitting Change Order</b>	eSig Not Required	Comment Not Required
<b>Taking Ownership of Change Order</b>	eSig Not Required	Comment Not Required

<b>Taking Ownership &amp; Initiating Change Order</b>	eSig Not Required	Comment Not Required
<b>Editing Change Order</b>	eSig Not Required	Comment Not Required
<b>Reopening Change Order</b>	eSig Required	Comment Required
<b>Adjusting Plan of Change Order</b>	eSig Required	Comment Required
<b>Voiding Change Order</b>	eSig Required	Comment Required
<b>Submitting Change Order for Approval</b>	eSig Not Required	Comment Not Required
<b>Approving/Rejecting Change Order</b>	eSig Not Required	Comment Not Required
<b>Submitting Change Order for Implementation Approval</b>	eSig Not Required	Comment Not Required
<b>Approving/Rejecting Change Order Implementation Approval</b>	eSig Required	Comment Required
<b>Releasing Change Order</b>	eSig Required	Comment Not Required

-Enter required field value under Sign-Off Signature section.

-Click Save.

#### 4. **BB-18** RESOLVED Configure & Package Change Resolutions

-Go To -> Picklist Values Tab

-Click on New to Add following data

Picklist Value Name : Voided

Value : Voided

Category : Change Resolution Code

Click on New to Add following data

Picklist Value Name : No Further Action Needed

Value : No Further Action Needed

Category : Change Resolution Code

1 issue

#### Deployment Steps

NOTE: Please make sure that all mentioned pre deployment steps are carried out before executing the deployment steps.

Deployment of CQ BB contains two packages.

##### STEP 1: INSTALLING UNLOCKED PACKAGE

1. Logon to the org where you want the package to be installed as System Administrator. Make sure CQ v7.4.7 is previously installed.

2. Use following URL to install the package into BB organization

```
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1U000006ZjWRQA0
```

Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with <http://test.salesforce.com>  
You may need to re-enter your credentials.

3. You will be prompted for installation key (which is **CQBB**, all in CAPS)

Please type CQBB and click on Continue

4. Select 'Install For Specific Profiles' and Click on Install

5. After completion, you will see 'CQ BB Configuration' in the list of Installed Packages

##### STEP 2: Deploying Unmanaged External Package

CQ configuration in beta bionics has an external package containing items that cannot be sent in the unlocked package. Please follow the steps below to deploy it.

1. Go to <https://workbench.developerforce.com/login.php>

2. For Environment field, select Production or Sandbox depending upon the target deployment Org receiving the package
3. Select "I agree to the terms of service" checkbox
4. Leave other fields as is and click on Login with Salesforce.
5. Provide username and password in the login form and click on login button.
6. Go to Migration Tab and select Deploy.
7. Choose the CQ\_BB\_Ext\_Package.zip file.  
you will find this in beta bionics git repo under location - beta-bionics\Source\CQ BB Unmanaged Package
8. Check Rollback on Error.
9. Select RunSpecifiedTests and enter CQ\_BB\_Test\_Ext\_Controlled\_Doc
10. Click on Deploy and wait until the deployment completes.
11. Go to Packages (Package Manager in Lightning mode) and verify that a package named "CQ BB 1.0.0 - External Package" is present.

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## Post-deployment Steps

### 1. **BB-12** **RESOLVED** Configure Document Profile Fields

#### A. Setting up default Libraries

-Go To -> Setup -> Custom Metadata Types

-Click on Manage Records next to **CQ BB Setting**

-Click on Edit and Enter the Name of Default Controlled document libraries (refer to pre-deployment steps) in their respective fields.

- Default Draft Library : <Default Draft Library Name>
- Default Release Library : <Default Release Library Name>

Do the same with the course libraries.

#### B. Setting up Document Revision Style

-Go to Setup>Custom Settings

-Click Manage next to CQ Settings

- Click on Edit

-Set **Document Default Revision Style** As **A**

-Click on Save

### 2. **BB-15** **RESOLVED** Configure Emails - Change Management

#### Setting User's Locale

- Go To Manage User -> Users
- Click Edit Next to User
- Go to Locale Settings and change the Locale to desired one

### 3. **BB-16** **RESOLVED** Configure New Change Order Process Flow

-Go To -> Setup -> Approval Processes

-Choose 'Change Order' in Manage Approval Processes For

-Deactivate 'CQ Change Order Approval Matrix' Approval Process

-Reorder As

Order	Approval Process
1	CQ BB Change Order Approval Matrix
2	CQ Change Order Implementation Approval

### 4. **BB-32** **RESOLVED** Configure Auto Document Numbering Schemes

#### Importing Auto Numbers

- a. Go to Setup - Data Import Wizard
- b. Click on Launch Wizard
- c. Select Custom Object Tab in 'What kind of data are you importing?' section
- d. Click on **Auto Numbers** in the list
- e. Click on Add New Records in 'What do you want to do?' section
- f. On 'Where is your data located?' section, Click on CSV and browse to the 'beta-bionics\Main\Resources\AutoNumberFormats.csv' file
- g. Click on Next
- h. Make sure that the fields are mapped as below-

Mapped Salesforce Object	CSV Header
Auto Number Name	Name
Number Format	Number Format
Numeric Format	Numeric Format
Next Number	Next Number

- i. Click on Next
- j. Click on Start import

#### Deactivating Out of the Box process and flow

- a. Go to Setup -> Process Builders
- b. Find a process builder with name "CQ Controlled Document - Process Auto Numbering" and Deactivate if it is active
- c. Similarly, go to Setup -> Flows
- d. Deactivate the flow with name - "CQ Controlled Document - Set Next Controlled Document Number"

#### **5. Permission Set Assignment**

Users must be provided **CQ\_\_BB\_Custom\_Permission\_Set** in order to be able to use the CQ BB Configurations.

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