



Intapp Flow™
Release Notes

Version 3.6 HF2 | March 2017

TABLE OF CONTENTS

Preface	6
Purpose of This Guide	6
Who Should Use This Guide	6
Disclaimer	6
Intapp Web Site	6
Intapp Technical Support	6
Intapp Customer Portal	6
Release Overview	7
Features	15
3.0 New Features and Enhancements	15
Application Search	15
Requests	15
Dashboard	15
User Preferences	15
Form Designer	15
Workflow Designer	15
Notification Designer	16
Integration Designer	16
Mobile	16
Data Management	16
Application Management	16
3.0 Hotfix 1	17
3.0 Hotfix 2	17
3.0 Hotfix 3	17
3.0 Hotfix 4	17
3.0 Hotfix 5	17
3.0 Hotfix 6	18
3.0 Hotfix 7	18
3.0 Hotfix 8	18
3.1 New Features and Enhancements	18
Requests	18
User Preferences	18
Data Management	18
Form Designer	18

Workflow Designer	19
Integration Designer	19
Reports	19
Mobile	19
Performance	19
Document Assembly (additional module)	19
3.1 Hotfix 1	19
3.1 Hotfix 2	19
3.1 Hotfix 3	20
3.1 Hotfix 4	20
3.1 Hotfix 5	20
3.1 Hotfix 6	21
3.2 New Features and Enhancements	21
Performance	21
User Experience	21
Mobile	21
Application Management	21
Integration Designer	21
Notification Designer	21
Requests	22
Reports	22
3.2 Hotfix 1	22
3.2 Hotfix 2	22
3.2 Hotfix 3	22
3.2 Hotfix 4	22
3.2 Hotfix 5	23
3.2 Hotfix 6	23
3.2 Hotfix 7	23
3.3 New Features and Enhancements	23
Form Designer	23
User Interface	23
Integrations	24
Requests	24
Mobile	24
Data Management	24
Reports	24
API	24
Security	24

Technical Requirements	25
Installation	25
3.3 Schema Changes	25
3.3 Hotfix 1	26
3.4 New Features and Enhancements	27
Tasks	27
User Experience	27
Mobile	27
Technical Requirements	27
3.4 Schema Changes	27
3.4 Bug Fixes	28
API	28
Requests	28
Designers	29
Reports	29
User Experience	29
Notifications	29
Data Management	29
Mobile & iOS	29
Application Management	30
3.4 Hotfix 1	30
3.4 Hotfix 2	30
3.5 New Features and Enhancements	30
Tasks	30
Requests	31
Notification Designer	31
API	31
Mobile	31
Technical Requirements	32
3.5 Schema Changes	32
3.5 Bug Fixes	34
API	34
Requests	34
Tasks	34
Designers	34
Reports	34
User Experience	34
Data Management	35

Mobile & iOS	35
Application Management	35
3.5 Hotfix 1	35
3.5 Hotfix 2	35
Bug Fixes: New Request Page	35
3.5 Hotfix 3	36
3.6 New Features and Enhancements	36
Requests	36
Form Designer	36
Notification Designer	36
User Experience	36
Mobile	36
Technical Requirements	37
Installation	37
3.6 Schema Changes	37
3.6 Bug Fixes	38
Requests	38
Designers	39
Dashboard	39
Notifications	39
Mobile & iOS	39
Application Management & API	39
3.6 Hotfix 1	40
3.6 Hotfix 2	40

PREFACE

Purpose of This Guide

This document contains important information on an Intapp Flow™ software release.

Who Should Use This Guide

The information contained herein is relevant to Intapp Flow™ Administrators and Intapp partners.

Disclaimer

This document is the property of Intapp, Inc., and is delivered to customers and partners. Although all efforts have been made to keep this document up to date, all content is subject to change as new versions of the Intapp software are released. This document may not be distributed to persons, companies, or entities other than the intended recipients without the consent of Intapp, Inc.

Intapp Web Site

You can access the Intapp corporate web site at www.intapp.com. The site contains information about Intapp, its background, upcoming events, and sales offices. You will also find product and partner information. The services area of the site includes important information about technical support, training and education, and implementation services.

Intapp Technical Support

For questions regarding Intapp Flow™ or any Intapp product, please contact Intapp Technical Support at (650) 852-0400 ext. 2 (+44 845.834.0128 in the United Kingdom), or send an e-mail to support@intapp.com.

Intapp Customer Portal

For the latest Intapp Flow™ updates and updates for all Intapp products, visit our Customer Portal at <https://intapp.secure.force.com/portal/>.

RELEASE OVERVIEW

Intapp Flow was built from the ground up to address modern firm environments and their requirements for business process, legal process, and workflow automation. It's not a "blank slate" toolkit for building ugly forms using a complex, arcane back end. Instead, Intapp Flow offers an intuitive web-based interface (both for defining processes and for end users). It also enables rapid success, with templates specifically designed for common law firm business activities.

Note: Please refer to *Intapp Flow™ – Technical Requirements* for **Minimum System Requirements**.

Release No	Release Date	Impacted Modules/Components
3.0	January 26, 2015	Highlight Features <ul style="list-style-type: none">• Export/Import Workflow Definitions• iPad Native App• Out of Office• Assign Requests• Save Request List Filters• Request Status Dashboard Widget
3.0 HF1	February 13, 2015	Bug Fixes: <ul style="list-style-type: none">• Query Integrations• Workflows
3.0 HF2	March 12, 2015	Bug Fixes: <ul style="list-style-type: none">• Workflows• Exchange Server• Installer
3.0 HF3	March 30, 2015	Bug Fixes: <ul style="list-style-type: none">• Installer• Data Management• Custom Fields• Database• Performance
3.0 HF4	April 21, 2015	Bug Fixes: <ul style="list-style-type: none">• Installer• Notifications• Integrations
3.0 HF5	May 21, 2015	Bug Fixes: <ul style="list-style-type: none">• iOS Client• Grid Questions
3.0 HF6	July 14, 2015	Bug Fixes: <ul style="list-style-type: none">• Data Management• Exchange Server• Integrations

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> • Notifications • Grid Questions
3.0 HF7	August 10, 2015	Bug Fixes: <ul style="list-style-type: none"> • Notifications
3.0 HF8	April 21, 2016	Bug Fixes: <ul style="list-style-type: none"> • Reports • iOS Application • Requests
3.1	May 1, 2015	Highlight features: <ul style="list-style-type: none"> • Document Assembly Module (optional) • Initiate requests via mobile Major Enhancements <ul style="list-style-type: none"> • Performance • Reporting UI • Request categories • Constraints on grid questions • Secretary can set Out of Office Delegate • IB Integrations • Answer questions in mobile app
3.1 HF1	May 15, 2015	Bug Fixes: <ul style="list-style-type: none"> • API • Performance • Security • Installer • Reports
3.1 HF2	June 22, 2015	Bug Fixes: <ul style="list-style-type: none"> • iOS application • Data Management • Notifications
3.1 HF3	July 21, 2015	Bug Fixes: <ul style="list-style-type: none"> • iOS application • Data Management • Exchange Mail service • Grid Questions • Workflows
3.1 HF4	August 17, 2015	Bug Fixes: <ul style="list-style-type: none"> • iOS application

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> • Data Management • Exchange Mail service • Notifications • Request List
3.1 HF5	November 20, 2015	Bug Fixes: <ul style="list-style-type: none"> • Requests • Repeatable Question Groups • Workflows • Browser Plug-in • Grid Questions • Query Integrations • iOS Application
3.1 HF6	December 30, 2015	Bug Fixes: <ul style="list-style-type: none"> • Mobile Web
3.1 HF7	February 26, 2016	Bug Fixes: <ul style="list-style-type: none"> • File Attachments • Data Management
3.2	October 9, 2015	Major Enhancements: <ul style="list-style-type: none"> • Performance • User experience improvements • Asynchronous request actions • SSRS Report module • Security updates via API • iOS application
3.2 HF1	November 2, 2015	Bug Fixes: <ul style="list-style-type: none"> • Parallel States • Reports
3.2 HF2	November 23, 2015	Bug Fixes: <ul style="list-style-type: none"> • Parallel States • Workflows • Security
3.2 HF3	December 17, 2015	Bug Fixes: <ul style="list-style-type: none"> • Workflows • Requests • Performance
3.2 HF4	January 29, 2015	Bug Fixes: <ul style="list-style-type: none"> • Notifications

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> • Grid Questions • Mobile Web • iOS • Logging • Query Integrations
3.2 HF5	February 4, 2016	Bug Fixes: <ul style="list-style-type: none"> • File Attachment
3.2 HF6	February 29, 2016	Bug Fixes: <ul style="list-style-type: none"> • Workflows • Comments and Notes • Display Conditions • File Attachments • iOS and Mobile
3.2 HF7	April 4, 2016	Bug Fixes: <ul style="list-style-type: none"> • Dashboard • Form Designer • Notifications • Import/Export
3.2 HF8	May 6, 2016	Bug Fixes: <ul style="list-style-type: none"> • File Attachment • Installer • Mobile Web • Requests
3.2 HF9	June 14, 2016	Bug Fixes: <ul style="list-style-type: none"> • Requests • Forms • Exchange Mail Service
3.2 HF10	June 24, 2016	Bug Fixes: <ul style="list-style-type: none"> • User Experience
3.2 HF11	July 1, 2016	Bug Fixes: <ul style="list-style-type: none"> • Grid questions • Browser plug-in • Dashboard widgets
3.2 HF12	July 6, 2016	Bug Fixes: <ul style="list-style-type: none"> • Request list gear menu
3.2 HF13	September 13, 2016	Bug Fixes: <ul style="list-style-type: none"> • Request conversion

Release No	Release Date	Impacted Modules/Components
3.2 HF14	October 7, 2016	Bug Fixes: <ul style="list-style-type: none"> Request conversion
3.2 HF15	November 7, 2016	Bug Fixes: <ul style="list-style-type: none"> Notifications
3.3	April 18, 2016	Major Enhancements: <ul style="list-style-type: none"> Designers and System Configuration Integrations Grid Questions Requests Mobile Web and iOS User Interface API Security
3.3 HF1	May 20, 2016	Bug Fixes: <ul style="list-style-type: none"> Installer Requests File Attachments: E-mail Messages Exchange Agent
3.3 HF2	July 18, 2016	Bug Fixes: <ul style="list-style-type: none"> Requests Action Buttons User Experience Grid questions Browser plug-in Dashboard widgets Notifications Mobile
3.3 HF3	August 25, 2016	Bug Fixes: <ul style="list-style-type: none"> Security Parallel States Requests
3.3 HF4	September 23, 2016	Bug Fixes: <ul style="list-style-type: none"> Performance
3.3 HF5	October 20, 2016	Bug Fixes: <ul style="list-style-type: none"> Application Management Import/Export
3.3 HF6	November 11, 2016	Bug Fixes:

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> E-mail approvals
3.3 HF7	December 9, 2016	Bug Fixes: <ul style="list-style-type: none"> API Data Management Requests Required Question Groups
3.3 HF8	December 28, 2016	Bug Fixes: <ul style="list-style-type: none"> Dashboard Widgets Management Reports
3.3 HF9	January 16, 2017	Bug Fixes: <ul style="list-style-type: none"> API Notifications
3.3 HF10		<i>Internal release only.</i>
3.3 HF11	February 2, 2017	<i>No changes to Intapp Flow™.</i>
3.3 HF12	March 3, 2017	Bug Fixes: <ul style="list-style-type: none"> Requests Parallel States
3.3 HF13	March 17, 2017	Bug Fixes: <ul style="list-style-type: none"> Requests Parallel States E-mail Approvals
3.4	August 1, 2016	New Feature: <ul style="list-style-type: none"> Tasks (additional module) Enhancements: <ul style="list-style-type: none"> UI/UX Improvements Mobile Web and iOS
3.4 HF1	September 6, 2016	Bug Fixes: <ul style="list-style-type: none"> Mobile Web and iOS Parallel States Requests
3.4 HF2	September 16, 2016	Bug Fixes: <ul style="list-style-type: none"> Mobile Web
3.4 HF3	December 5, 2016	Bug Fixes: <ul style="list-style-type: none"> Application Management Import/Export Mobile Web and iOS

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> Email Approvals
3.4 HF4	February 3, 2016	Bug Fixes: <ul style="list-style-type: none"> Mobile Web Data Management Management Reports
3.5	November 1, 2016	Enhancements: <ul style="list-style-type: none"> Request Details page Tasks (additional module) Tasks for iOS REST API Notifications Security
3.5 HF1	November 11, 2016	Bug Fixes: <ul style="list-style-type: none"> Requests Tasks for iOS
3.5 HF2	December 20, 2016	Bug Fixes: <ul style="list-style-type: none"> New Request Page Management Reports Data Management
3.5 HF3	January 6, 2017	Bug Fixes: <ul style="list-style-type: none"> New Request Page Data Management
3.5 HF4	January 12, 2017	Bug Fixes: <ul style="list-style-type: none"> Requests
3.5 HF5	February 6, 2017	Bug Fixes: <ul style="list-style-type: none"> Requests Parallel States Mobile Web
3.5 HF6	February 17, 2017	<i>No changes to Intapp Flow™.</i>
3.5 HF7	February 28, 2017	Bug Fixes: <ul style="list-style-type: none"> Requests Notifications Integrations
3.6	February 1, 2017	New Features and Enhancements: <ul style="list-style-type: none"> Requests Form Designer

Release No	Release Date	Impacted Modules/Components
		<ul style="list-style-type: none"> • Notification Designer • UI/UX • Mobile
3.6 HF1	February 28, 2017	Bug Fixes: <ul style="list-style-type: none"> • Requests • Notifications • Integrations • Mobile Web/iOS
3.6 HF2	March 22, 2017	Bug Fixes: <ul style="list-style-type: none"> • Requests • Notifications • Integrations • Mobile Web/iOS

FEATURES

3.0 New Features and Enhancements

Application Search

- **Search:** The top level application search now includes client, matter and party results and allows for instant click-through access to the respective profiles. Comments, notes and question answers from requests are also included as searchable criteria.

Requests

- **Assign Request:** Assign or reassign a request to another user.
- **Configurable Request Properties:** Configure request custom fields that can be used to display information as columns on the request list. Configurable Request Properties can also be used in some dashboard widgets and various other places in Intapp Flow™.
- **Grid Questions:** Improvements to the grid question type to support row hierarchy, drag-n-drop rows and a collapsible input section.
- **Repeatable Question Groups:** A group of questions can be repeated to allow for use cases when multiple instances need to be provided.
- **Request List Filters:** Users can save and reuse their favorite request list filters.
- **Concurrent Saving:** Improvements to request autosaving to allow multiple users to edit a request concurrently.

Dashboard

- **Request Summary:** New dashboard widget that displays number of requests grouped by the amount of time since the request was opened. Requests can also be filtered by teams and team members.
- **Request Status:** Enhancements to request status bar and pie chart widgets to allow for grouping by additional properties. Widgets also now support configurable request properties.
- **Dashboard Widget Configuration:** Some dashboard widget properties are configurable via system administration.

User Preferences

- **Out of Office:** Users can designate a delegate to receive and process their request assignments while they are out of the office for extended time periods.

Form Designer

- **Grid Questions:** Additional design options for grid type questions including the ability to allow drag-n-drop rows, row hierarchy, unique row criteria, display conditions and mathematical validations.
- **Repeatable Question Groups:** Configure question groups so that users can reuse a question group to add multiple instances on the form.
- **Export/Import:** Export form definitions and import them into another Flow system.
- **Label Question:** Added more formatting and HTML support to the label question type.
- **Append Rows:** Added a configuration option to determine if a query integration appends or overwrites related party and grid question data.

Workflow Designer

- **Team Permissions:** Assign request permissions based on a user's team role.
- **Move Transition:** Drag and drop a transition to another state via the design board.

- **Export/Import:** Export workflow definitions and import them into another Flow system.
- **Delete Parallel Threads:** Delete a single thread in a parallel branch.
- **Case Sensitive Transition Labels:** Transition action buttons are now case sensitive.
- **Required Comments:** Configuration option to require a comment for a specific transition. Includes the ability to specify instructional text for the comment.

Notification Designer

- **Single Step Approvals:** Configure request action buttons in emails to bypass the confirmation and comment prompt.
- **Reply Actions:** Include request action buttons in emails that enable users to take actions via an email reply.
- **Export/Import:** Export notification templates and import them into another Flow system.
- **Action Comments:** Improvements to allow comments entered during transitions to be included in notification events.

Integration Designer

- **Export/Import:** Export query integration definitions and import them into another Flow system.
- **Multiple Parameters:** Query integrations can use list data as variables.

Mobile

- **iPad Native App:** New iOS native application for iPads.
- **iOS Navigation:** Updated styling to introduce tabbed navigation.
- **iOS Icon Counter:** Counter on icon indicates how many requests are assigned to the user for review.
- **iOS Notifications:** Native iOS push notifications that inform the user they have a new request to review.
- **iOS Inbox:** Inbox in the iOS application quickly shows users requests that are assigned to them.
- **iOS Out of Office:** Manage your Out of Office settings from the iOS application.
- **iOS Caching:** Added caching to the iOS application to improve performance.
- **iOS Logging:** Added system log to iOS application to aid client troubleshooting.
- **Mobile Web Redesign:** The mobile web user interface was updated to be more consistent with the iOS application.

Data Management

- **Initiate Workflows:** Create requests directly from the data management pages by adding buttons to the profiles.
- **Extended Field Visibility:** Users can configure which fields they want to see as columns in the client, matter, party and group data management lists.
- **Expanded Page Width:** The display area of the data management pages has been expanded to the full width of the screen.

Application Management

- **Teams:** Indicate that a group of users is a team and assign the group members specific team roles. Workflow permissions can be assigned based on a user's team role.
- **User Custom Fields:** User custom fields are displayed in the user profile.
- **Dashboard Widget Configuration:** Some properties of the dashboard widgets are configurable via system administration.

- **Button Labels:** System configuration option to manage action button labels not configurable via the workflow designer. Supports case sensitivity.
- **External Providers:** New tab in System Administration to configure connection credentials for an external system like document assembly services.
- **API:** New operation to update question answers in a request.

3.0 Hotfix 1

- System with a large number of workflows becomes unresponsive after IIS Reset.
- HTML formatting in datatable type query integration is rendered incorrectly in datatable question.

3.0 Hotfix 2

- Exchange Server configuration panel is unavailable.
- Workflow or form import fails if it includes a form definition with an invalid requirement group.
- Services installer specific to Intapp Flow now available.

3.0 Hotfix 3

- Requests can be approved without answering required questions.
- Question-answers are not saved correctly if set from a dropdown menu using the keyboard.
- Users with view-only privileges are included in **People working on this request** list.
- Converter tool exits after finding invalid data, rather than logging the exception and proceeding.
- Intapp Flow database:
 - Some email-related tables are not properly indexed.
 - Custom fields are stored using inconsistent formats.
- Button style JavaScript causes performance lags in IE8 and IE9.
- Excessive AjaxPro requests can cause sluggish performance.
- Business action logs now include duration information.

3.0 Hotfix 4

- ClientID parameter is not saved during an integration.
- Upgrade process runs out of memory when a request definition contains a large number of forms.
- Notifications include extra line breaks.
- Reference name is displayed in place of question title in notification smart lookups.
- Smart lookup question within grid is not properly displayed in a notification.

3.0 Hotfix 5

- iOS device failed to receive push notifications.
- iOS client no longer needs to be upgraded whenever server is upgraded to latest hotfix.
- Error occurred when printing form with hidden columns in grid question.
- Default value was not applied properly to a drop-down list question inside a grid question.

3.0 Hotfix 6

- Email synchronization failed when the Exchange Mail service encountered invalid messages or message fields.
- User is now warned about unsaved values in dropdown lists before proceeding with a page refresh.
- If read-only conditions include Current State values, question group unexpectedly becomes read-only while editing a grid row.
- Mobile users are redirected incorrectly by notification links and action buttons.
- Default value integrations for sub-requests were not run when the sub-requests were created.
- Client ID column was unavailable for the Matters list.
- The Practice Areas and Departments dropdown menus became unavailable after a long value was selected from the list and added to the user profile.
- The Practice Areas dropdown menu was displayed incorrectly on the user profile page.

3.0 Hotfix 7

- Improved processing of notification emails by adding indexes.

3.0 Hotfix 8

- An error occurred after adding a duplicate answer to a repeatable question group.
- Values chosen from a large drop-down list using the keyboard were not saved.
- Report Execution Service timeout value can now be configured in the database.
- After a required question of type multiple answer/drop down list was answered, the application continued to prompt for an answer.
- iOS application has been updated to work with the latest version of Good MDM.
- Additional logging for request approval via email scheduler job has been added.

3.1 New Features and Enhancements

Requests

- **Request Types:** For ease in selecting a workflow, users can view request types sorted by category in the Create Request dialogue.

User Preferences

- **Out of Office:** Secretaries can set out-of-office delegates for lawyers.

Data Management

- **Create entities capability:** Users can be given the ability to create new entities within data management.
- **Profile text entry field enhancement:** Multi-line text entry fields can expand to multiple rows or resize text entry box.

Form Designer

- **Changes are automatically saved** whenever a user moves between questions in the form designer.

Workflow Designer

- **Grid constraints:** Mathematical constraint validation is now tied to requirement groups and occurs when a user clicks approve or submit.

Integration Designer

- **IB Lookup:** Query using Integration Builder datasource now offers a rule lookup and automatically retrieves inputs for the chosen rule.
- **Development, Test and Production** instances are enabled for an Integration Builder datasource.

Reports

- **Reporting UI improved** to make finding and filtering reports easier.

Mobile

- **iOS New request:** Initiating a new request from the mobile app.
- **iOS Answering questions:** Questions can now be answered directly from the app.
- **Mobile Web Inbox:** Quickly shows users requests that are assigned to them, similar to the iOS app.

Performance

- **Workflow Transitions:** Improved performance of transitions for complex workflows.
- **Improvements** to page rendering and query execution performance.

Document Assembly (additional module)

- **Document Question Type:** Provides a new question type that allows for the automated generation and attachment of files from select document assembly providers.
- **Data Integration:** Map request properties and question answers to document template variables via the Form Designer.
- **Leading Document Assembly Providers:** Module provides native support for HotDocs or Business Integrity's ContractExpress.
- **Notifications:** Notify users via email when a document has been assembled and attached to the request.

3.1 Hotfix 1

- iOS application crashed while navigating during Requests list update.
- Mobile API returned an error editing forms containing Attachment questions.
- Report types were duplicated during upgrade from 3.0 to 3.1.
- Restricted users could be selected when assigning, sharing or delegating a request, resulting in error.
- Converter utility is now more resilient to invalid objects in database.
- GetRequest and UpdateRequest APIs have been simplified.
- Faster rendering of grids and tables across the application, including request list, grid questions, etc.

3.1 Hotfix 2

- After a request approval attempt, the iOS application became unstable while answering a required smart lookup question.
- Redirect URL to mobile application was incorrect in notifications.

- Navigation tab positions were rendered incorrectly in Chrome.
- Top level search did not return results for component groups.

3.1 Hotfix 3

- The Client ID column was unavailable for the Matters list.
- Duplicate grid question titles were displayed.
- Request Current State was not loaded upon editing a grid question row.
- Required smart lookup type questions were not validated if they were part of a grid question.
- Required validations worked incorrectly when editing grid sub-questions.
- iOS application became unstable if a smart lookup question answer was entered quickly.
- iOS application sent too many requests to the server when loading the Request list.
- Emails were not synchronized when the Exchange Mail service encountered invalid messages or message fields.
- Imported workflows did not load in the workflow designer.
- Users could remove values from read-only smart lookup fields.
- Mobile users were redirected incorrectly by notification links and action buttons.

3.1 Hotfix 4

- Improved processing of request approval emails by adding indexes.
- An error occurred when a user double-clicked an entity link.
- An error occurred when attempting to cancel a request from the request list.
- In the iOS application, display conditions were not applied to questions until the page was refreshed.
- Email synchronization timed out after ten minutes.
- If Flow Mobile for Good Dynamics was opened without entering credentials, the application became unstable while running in background.
- The Attachment Notification section appeared in the Attach File lightbox even when no template was present for the File Attached event.
- iOS application became unstable when a request action was performed.

3.1 Hotfix 5

- An error occurred after adding a duplicate answer to a repeatable question group.
- Values chosen from a large drop-down list using the keyboard were not saved.
- In Outlook Web Application, the e-mail message body text editor was disabled when the Intapp browser plug-in was enabled.
- Print buttons were disabled in IE11 when the Intapp browser plug-in was installed and enabled.
- Report Execution Service timeout value can now be configured in the database.
- E-mail Sync Agent skipped certain e-mail messages during synchronization.
- After a required question of type multiple answer/drop down list was answered, the application continued to prompt for an answer.
- iOS application has been updated to work with the latest version of Good MDM.
- "Recent Comments" widget was not displayed properly in Internet Explorer.
- Changes to an incoming parameter were not passed to a query integration.

- Unnecessary validations were shown for completed required grid questions.
- Portions of text were missing after being pasted into the Notes or Comments field.
- Additional logging for request approval via email scheduler job has been added.
- A smart lookup question based on an integration could not be answered because values never became available.
- An error occurred when answering a drop-down list question which serves as a parameter to a query integration of another question.

3.1 Hotfix 6

- Mobile Web: In a workflow with multiple approval or decline transitions, only the first transition worked.

3.2 New Features and Enhancements

Performance

- **Numerous performance optimizations** to key Intapp Flow™ features.
- **Performance logging improvements** including client side timing, SQL monitoring, and environment statistics.
- **Performance Investigation Worksheet** enables firms to collect data to investigate performance concerns.
- **Improved performance of pages with grids** that allow paging (such as Request, Client, or Matter lists).

User Experience

- **Date formats** have been standardized across the application.
- **Link formatting:** URLs appear as hyperlinks in Comments and Notes, and in the Recent Comments banner.

Mobile

- **Backward compatibility:** Intapp Flow™ for iOS 3.2 is backward compatible with the 3.1 server.
- **Overall performance and stability** improvements to iOS and Mobile Web applications.
- **iOS 9 compatibility:** Intapp Flow™ for iOS is now compatible with iOS 9.
- **Edit all question types in iOS,** including all grid question types and repeatable question groups.
- **Usability improvements** to mobile applications.

Application Management

- **API:** Users can now get and set entity security via an API method.

Integration Designer

- **Identify and fix invalid integrations** within object definition imports.
- **Integrations have been optimized for workflow transitions** and are cached when used multiple times.

Notification Designer

- **Questions are now organized by form** in the Notification Designer, allowing users to easily filter relevant question sets.

Requests

- **Asynchronous request actions:** Users can continue working on a request while actions are in process.
- **Request action e-mail alerts:** If a request action fails, then the user who performed the action and the administrator are notified via e-mail.
- **Stay on Request Page:** New capability replaces "Stay on Request" system configuration: only users with this capability can continue working within a request after taking action. All other users return to the request list.
- **Cloned requests logged in Activities:** Cloning a request is now logged as an activity for both the source and the cloned request.
- **E-mail Approval:** Various improvements to Exchange Synchronization Agent.

Reports

- **Reports module improved** to better leverage SSRS capabilities for standard report templates.

3.2 Hotfix 1

- When fields required on one parallel branch were incomplete, request could not be moved forward in any other parallel state.
- After an action was taken on a request, the green banner showed the transition name instead of the label configured in the workflow designer.
- In a parallel state, a section remained hidden after clicking "edit" in a grid row.
- Requests in state prior to ad hoc state could not be approved from request details page.
- Remote reports were not synchronized correctly.

3.2 Hotfix 2

- Several security vulnerabilities related to cross site scripting, SQL error messages and cross site redirection have been fixed.
- Verbose error pages now show a generic error message to the user. To reinstate the default behavior of verbose error messages (not recommended in production), set the ShowDetailsOnErrorPage database config variable to 1.
- Mobile Web/iOS application: A user who was given permissions for only one parallel state could access multiple states.
- Mobile Web: In a workflow with multiple approval transitions, one approval transition could not be selected.

3.2 Hotfix 3

- In a request, the application did not populate a hidden user lookup if it depended on data from another user lookup.
- Workflow permissions set via form answers were not applied correctly to requests.
- URLs containing semicolons could not be opened from within Notes or Comments.
- Performance has been improved when loading pages.

3.2 Hotfix 4

- Notifications could not be sent when a label question-answer was included in the notification template body.
- Grid question row could not be updated after another row was deleted.
- **Mobile Web:** While working in a slow network, some parameters may be dropped from a URL.
- **iOS:** App Store iOS application was incompatible with the Flow server once the server was upgraded to 3.2.2.
- Parties will now be assigned simple IDs rather than GUIDs (existing GUIDs are unchanged).

- Logging in Flow web logs has been improved.
- Fixed multiple issues with smart lookups involving integrations and display conditions.
- Circular references in drop-down questions linked to query integrations resulted in errors.

3.2 Hotfix 5

- Default attachment type could not be specified while uploading a file in data management profile pages and request forms.

3.2 Hotfix 6

- Requirement groups were incorrectly configured after importing a workflow.
- Request, client, and matter names longer than 256 symbols caused the application to become unstable. Long names are now truncated automatically.
- In parallel states, Current State property causes errors when used in display conditions and query integrations.
- An error occurred after opening a request with an answered Related Parties question.
- An error occurred after double-clicking **show more** on the Activities page for a request.
- A grid question column did not appear as an available answer for another grid question located in a hidden section.
- Application became unstable if an invalid email message was attached to a request or data management profile.
- In Mobile Web, an attached file could not be downloaded from a request.
- For iOS 9.0+, email notification links could not redirect to the iOS application.
- Mobile Web application can now detect the presence of the iOS client.

3.2 Hotfix 7

- Email notifications failed to be sent after a user was deleted from a question-answer referenced in the notification template.
- In the Form Designer, an error occurred after selecting and then deselecting the Document Question type.
- Email icons did not appear beside user names in the Share/Delegate screen.
- Definitions were exported from the development environment, rather than production, by default.
- An error occurred when dashboard widgets were simultaneously updated in different browser tabs. To increase the cache expiration time for dashboard widgets, you can now change the `AsyncTaskManagerCacheExpirationTime` parameter in the `web.config` file.
- A request was shown in the Requests Needing Your Approval widget when it was not in an actionable state.

Note: A .NET authorization rule that allows anonymous authorization at site level is not supported.

3.3 New Features and Enhancements

Form Designer

- New display conditions designer enables faster, simpler construction of complex forms.
- Current State drop-down list is available in the form designer.
- Reference names are visible when hovering over a question name.

User Interface

- Industry-specific terminology can be configured for the user interface.

Integrations

- Parameters for query integrations can be typed in rather than selected via lookup.
- Data update by integration can now be triggered by adding a new grid question row.

Requests

- Users can assign requests in bulk.
- Improved read-only styling for drop-down lists and smart lookup fields.
- Share requests button can be shown or hidden by administrators to better control access to requests.
- Request overview section can be hidden or collapsed to simplify request page layout.
- Display conditions can be applied to grid question columns.

Mobile

- A request can be initiated from Mobile Web.
- Questions can be edited in Mobile Web.
- Grid questions can be answered in Mobile Web.
- iOS application is available in the App Store.
- The MobileIron SDK has been updated to 2.4.
- Enhanced logging and telemetry is now available for Mobile Web and iOS.
- iOS 9.2 is supported.
- iOS application for iPad allows you to dismiss the request list.

Data Management

- User groups can honor client/matter security.
- Session management on the server for data management pages has been improved.
- Relationship grids on data management pages can now be configured.

Reports

- Improved Total Requests and Request Duration reports are now available.

API

- PerformRequestAction now supports passing the type and name of a transition for Approve and Decline actions.

Note: Due to a security fix, users may need to be re-assigned the necessary roles and capabilities to carry out API calls (such as Edit Client Details, Manage Users, and so on). Users can also be given Admin privileges in order to use the API.

Security

- Added ability to whitelist file types for upload.
- Added ability to configure access to inbuilt SQL datasource.
- Several security vulnerabilities related to cross site scripting, SQL error messages and cross site redirection have been fixed.

- Verbose error pages now show a generic error message to the user. To reinstate the default behavior of verbose error messages (not recommended in production), set the ShowDetailsOnErrorPage database config variable to 1.

Technical Requirements

- Intapp Flow™ 3.3 is the last release to support IE 9 and 10.
- iOS 7 is no longer supported.
- Web server RAM requirement is now 8GB, 16GB recommended.
- Intapp Integrate now requires 8GB of RAM.

Installation

- If an upgrade fails due to database error, the installer can now be restarted without first reverting to the backup.
- UpgradeDBScript is no longer available.
- Installer logs can be found in %temp% and use the naming scheme "Setup Log yyyy-mm-dd #xxx.txt".

3.3 Schema Changes

Note: This list of schema changes between Intapp Flow™ 3.2 and 3.3 does not include changes to procedures or functions and does not include new tables, views, procedures, functions, indexes or foreign key constraints. For a full list, please refer to the *Intapp Flow - Data Model* document.

Clients

Modified columns:

- [Name] column updated to NOT NULL

ConflictsSearchResults

Removed columns:

- [AliasForType]
- [HitRelationshipType]

Added columns:

- [CompanyBoardMembers_Id] [int] NULL
- [CompanyShareholders_Id] [int] NULL

ConflictsSearchTerms

Removed Columns:

- [CorporateTree_Id]

Added Columns:

- [BoardMembers_Id] [int] NULL
- [Shareholders_Id] [int] NULL

ConflictsSearchVersionResults

Modified columns:

- [NotesIdXml] type modified from [nvarchar] to [xml]

Removed columns:

- [HitRelationshipType]

Added columns:

- [Alias_Id] [int] NULL

CorporateTrees

Modified columns:

- [CorporateTreeXml] type modified from [nvarchar] to [xml]

CustomFields

Added columns:

- [Indexable] [bit] NOT NULL DEFAULT ((0))

IndustrySector

Modified columns:

- Added identity to [Id] [int] NOT NULL IDENTITY (1, 1)
- [Key] column updated to NOT NULL

Parties

Removed Columns:

- [CorpTreeld]

Added Columns:

- [BoardMembers_Id] [int] NULL
- [Shareholders_Id] [int] NULL

SearchLog - (INTERNAL)

Table refined. Please refer to schema doc.

SystemInfo

Added columns:

- [SearchEngineIndexStatus] [nvarchar] (32) NULL

UserPreferences

Added columns:

- [DocumentProfilePreferencesXml] [nvarchar] (max) NULL
- [TermDocumentViewerPreferencesXml] [nvarchar] (max) NULL

Work

Modified columns:

- [Name] column updated to NOT NULL

Note: A .NET authorization rule that allows anonymous authorization at site level is not supported.

3.3 Hotfix 1

- While in a courtesy approval state, no request activity or comments were recorded.
- E-mail Sync Agent missed e-mail messages when the collation type was not configured to be case-sensitive.
- A read-only checkbox could be checked or unchecked before page load or refresh.
- After an e-mail message with a long filename was attached to a request using the Intapp plug-in, the application became unstable when other users tried to open the request.
- Errors occurred during installation and upgrade if user passwords contained special symbols: affected areas included database update, installation with SQL authentication, and external report conversion.

3.4 New Features and Enhancements

Tasks

*Tasks is a new module available only to Intapp Flow™ customers who buy the Flow Advanced package. Please see the **Intapp Flow™ - New Features** guide for a more detailed introduction to Tasks.*

- Tasks are to do items that do not require approval. They can be created ad hoc or attached to a workflow.
 - Create new ad hoc tasks within the Tasks user interface: from the dashboard, from the Tasks list, or from a Client or Matter Profile page.
 - Invoke tasks within a workflow using Integrate rules and SOAP APIs.
- New Tasks API methods include Create Task, Get Task, Mark Task Complete, and Update Task.
- Users can be assigned new Create, View, and Edit Task capabilities.
- Tasks can be given a due date and description with extensive rich text formatting options.
- Assign and reassign tasks to a user or to groups. Tasks can be completed by their assigned user, or released back to the group for someone else to claim.
- Tasks can be associated with requests, clients, and matters.
- Tasks list page features sticky filters, search functionality, and sorting by all columns.

User Experience

- **Form Designer:** Questions panel and Configuration panel now scroll independently. **Save** and **Cancel** buttons are always visible.
- Drop-down lists are sorted alphabetically on the System Configuration page, Data Management profile pages, and User profile pages.
- Client/Matter/Party/Component Group lightboxes can now be configured to display additional property fields in specific columns and with specific widths.

Mobile

- AirWatch MDM is now supported.
- Various UI improvements have been made to comments and notes.
- Outlook email (.msg) attachments can now be displayed on the iPhone.

Technical Requirements

- Intapp Flow™ 3.4 no longer supports IE 9 and 10.

3.4 Schema Changes

Note: This list of schema changes between Intapp Flow™ 3.3 and 3.4 does not include changes to procedures or functions and does not include new tables, views, procedures, functions, indexes or foreign key constraints. For a full list, please refer to the *Intapp Flow - Data Model* document.

SearchLogRequests

New columns:

- [MaxSize] [int] NULL
- [From] [int] NULL

TermDefinitionPropertyTypes

Modified columns:

- [Id] [int] NOT NULL to [Id] [int] NOT NULL IDENTITY (1, 1),
- [Key] [nvarchar] (64) to [Key] [nvarchar] (256)

TermDefinitions

New columns:

- [LastModifiedBy_Id] [int] NULL,
- [LastModifiedOn] [datetime] NULL,
- [CreatedBy_Id] [int] NULL,
- [CreatedOn] [datetime] NULL

TermDocuments

Removed columns:

- [Invalid] [bit] NOT NULL DEFAULT ((0)),

Added columns:

- [ConversionFailsCount] [int] NOT NULL DEFAULT ((0))
- TimerWorkflowActions

Modified columns:

- [ExecuteOn] [datetime] NOT NULL to [ExecuteOn] [datetime] NULL

UserPreferences

Added columns:

- [TaskListPreferencesXml] [nvarchar] (max)

Modified following procedures:

- OpenReportsSearchDuration
- OpenReportsTotalRequests
- OpenReportsTotalSearches
- TermsOfBusinessReportsTermFrequency

Note: A .NET authorization rule that allows anonymous authorization at site level is not supported.

3.4 Bug Fixes

API

- An error occurred while updating a form answer via API when the form used user context items (such as Logged in User Name) as integration parameters.
- CreateClient method could not create a client without specified PartyId property.

Requests

- Long email names were replaced by a GUID during message attachment.
- The application became unstable when a user selected more than ten values for a custom filter on the Requests page.
- Sub-request names could not be set by the parent request.
- An autocomplete question lost the answer value after the page was refreshed.
- The request list was not correctly sorted when using Matter Name as a sort column.

- A Requirement Criteria condition was reset after renaming the question referenced in a request.
- After clicking on the chart of the request status summary widget, an incorrect filter was applied on the Requests list page.
- Bypass Confirmation Page did not reflect Action Label configurations.
- File sorting in the Files tab is now case insensitive.

Designers

- The workflow designer has added validation to prevent unreachable states from being added to the workflow.
- In the workflow designer, topmost states became inaccessible in very tall workflows.
- An error occurred when trying to remove grid questions "to uniquely identify a row" in the Form Editor.
- An error occurred during a workflow definition import when an unresolved value (such as the first three letters of a username) was left in a lookup field.
- IE11 did not correctly render the drag and drop process for a question in the Form Designer.
- In the Form Designer, an incorrect error message appeared after moving a field in a repeatable group.
- Requirement groups were saved improperly and needed to be reset before requests could be created.

Reports

- **Not set** was incorrectly displayed as a request type in the Request Summary report.
- Charts in the report were not created if the maximum chart height was too low to accommodate the available data.
- Some special symbols were displayed in encoded form in Intapp Flow™ Reports.

User Experience

- An error occurred when a user ran sessions in two separate tabs, then closed and reopened the browser to reload the previous tabs.
- An error occurred after double-clicking the list count limit link in a request list.
- The Out of Office Delegation **save** button was inaccessible on a small laptop screen.
- Several Data Management fields did not detect changes after a user used the "cut" (ctrl-x) function.

Notifications

- Out of Office notifications were not sent to Requested By recipient.
- Success request approval notification email displayed all the text on a single line, rather than including line breaks.

Data Management

- Errors occurred when switching a group type between Clients and Matters.
- For a client that was saved with two primary addresses, saving changes to either address caused an error.
- Component group security allowed users to be added twice and returned an error when the duplicate was removed.
- An error occurred when adding security settings to a group without specifying any users.
- State and Country codes, not names, were displayed in the Client Details lightbox.
- Notes were not displayed in the Client Details lightbox when a client hit was opened from the search results table.

Mobile & iOS

- iOS: The application became unstable when a user tried to claim a request.
- iOS: Request Details screen showed headers for hidden sections.

- iOS: The warning icon for the Address question field was not visible.
- iOS: The iPhone application ignored the set completion interval value for Auto-Complete questions.
- iOS: Failure to move to the next question after tapping the Next keyboard button.
- iOS: Title customization is now supported on the Create Request screen.
- iOS: In the iPad application, after searching for an item and then exiting search mode, the selected item was not displayed properly in the left part of the screen.
- iOS: After a request was delegated to another user, request actions were not performed when invoked from a notification.

Application Management

- An error while loading dashboard widgets prevented users from completing their login.
- Department data for a user was removed when the user account was activated.
- The External Providers tab was visible to a user with only Manage Users capability.
- AnswerValue and AnswerDisplayValue were saved to the database incorrectly.

3.4 Hotfix 1

- An imported form definition could not be used if a deleted sub-question was used in the list of unique columns.
- If incorrect answer values were passed from the parent request in the process of creating a sub-request, the sub-request creation failed and the parent request was suspended.
- A Cancel request action failed when the request was in parallel states and one parallel branch contained a decision state as its first state.
- An error occurred after attempting to add a required question group in a parallel state.
- Mobile Web: New rows could not be added to a grid question that was auto-populated by a query integration.
- Within certain Blackberry MDM and Good MDM deployments, error messages appeared when requests were approved from mobile devices.
- iOS: SDKs have been updated for Good Dynamics and Airwatch MDMs.

3.4 Hotfix 2

- Mobile Web: After a query integration added a row to a related parties grid question, the question details screen could not be opened.

3.5 New Features and Enhancements

Tasks

Tasks is a module available only to Intapp Flow™ customers who buy the Flow Advanced package.

- Multiple tasks per state can be created directly within the Workflow Designer and assigned to users or groups.
- Task custom fields can be defined for both ad hoc and workflow tasks.
- Tasks can be imported and exported along with other workflow components.
- Task List Page can be filtered to show only Overdue tasks.
- More columns, including Task Custom Fields, can be selected in the Task List.
- Ad hoc Task Notifications can be configured in System Configurations, whereas Workflow Task Notifications are configured in the Workflow Designer.
- Notification Designer now includes Tasks-related fields.

- Users can attach files and leave comments on tasks.
- Task Activities can be tracked.
- Tabs allow viewing of attached files, comments and activities.
- Users can set priorities for all tasks.
- Tasks can be updated or reassigned by users or groups currently assigned to the task.
- Client/Matter profile pages now allow you to view existing tasks and create new ad hoc tasks directly from a profile.

Requests

- Completely rewritten Request Page in new Single Page Architecture (SPA) improves usability and performance for large and complex forms.
 - The new architecture allows certain page elements to load and become interactive while others are still in progress.
 - Transition buttons now appear in a floating footer at the bottom of the page, replacing the buttons repeated in each section and in the Next Step banner.
 - Redundant section footers with duplicated files and comments have been removed.
 - Styling of numerous components has been updated, including **Files**, **Notes**, and **Activities** tabs, and grid displays.
 - The layout of different dialogs (for example Attach File, Share, and Delegate) has been simplified.
 - Certain less-used gear menu options are not available from the SPA request page, but can still be found in the Request List gear menu. (These options will be added to the request page in future releases.)
 - Importing of parties to a related parties question is currently unavailable, but will be added in future releases.

Notification Designer

- **Notification Template Usage** is visible in the Notification Designer, allowing users to see which workflows use the current template.

API

- REST API methods are now available and documented using Swagger UI.
- REST API allows you to create custom fields.
- API calls can now get user departments, practice areas, roles, and groups.

Mobile

- iOS application is now compatible with iOS 10.
- Intapp Flow™ Tasks for iOS includes the following functionality:
 - Edit task details and names
 - Mark a task complete
 - Change the status of a task
 - Claim or release a task
 - Assign tasks to users or groups
 - View a history of activities on a particular task
 - Specify custom fields during Task definition
 - Set a priority for a task

- Attach files to tasks
- Add comments to a task
- View task details page and tasks list page
- Show Tasks in inbox
- Flag overdue/due today tasks in Tasks details page, Tasks list, and Inbox

Technical Requirements

- Intapp Flow™ 3.5 has added support for Windows SQL Server 2016.
- To use the redesigned request page, WebSocket protocol must now be enabled in Windows Server 2012+.
- Windows Server 2008 R2 is no longer supported.

3.5 Schema Changes

Note: This list of schema changes between Intapp Flow™ 3.4 and 3.5 does not include changes to procedures or functions and does not include new tables, views, procedures, functions, indexes or foreign key constraints. For a full list, please refer to the *Intapp Flow - Data Model* document.

Clients

Added columns:

- [ToBContractualBasis_Id] [int] NULL
- [ToBlssuingEntity_Id] [int] NULL

ConflictsSearches

Added columns:

- [UserPreferences] [nvarchar] (max) NULL

ConflictsSearchReports

Added columns:

- [SkipRestrictions] [int] NOT NULL DEFAULT ((0))

ConflictsSearchResultCategories

Modified columns:

- [BackgroundColor] [int] NULL to [BackgroundColor] [nvarchar] (10) NULL
- [FontColor] [int] NULL to [FontColor] [nvarchar] (10) NULL

ConflictsSearchTerms

Added columns:

- [PossiblePartiesExist] [bit] NULL
- [CreatedOn] [datetime] NULL
- [ModifiedOn] [datetime] NULL
- [BeneficialOwners_Id] [int] NULL

Countries

Added columns:

- [AventionCountryIdV1] [nvarchar] (256) NULL

Forms

Added columns:

- [ModifiedOn] [datetime] NOT NULL

Parties

Added columns:

- [BeneficialOwners_Id] [int] NULL

SchedulerJobs

Added columns:

- [ServiceId] [int] NULL

Tasks

Modified columns:

- [CreatedBy_Id] [int] NOT NULL to [CreatedBy_Id] [int] NULL

TermDefinitions

Removed columns:

- [Required] [bit] NOT NULL DEFAULT ((0))
- [Default] [bit] NOT NULL DEFAULT ((0))

TermDefinitionsIntappLibrary

Removed columns:

- [Required] [bit] NOT NULL DEFAULT ((0))
- [Default] [bit] NOT NULL DEFAULT ((0))

Work

Added columns:

- [ToBContractualBasis_Id] [int] NULL
- [ToBlssuingEntity_Id] [int] NULL

Modified following procedures:

- ReportConflictsTemplateCoverPageSummary
- ReportConflictsTemplateHitBlackBooks
- ReportConflictsTemplateHitCOI
- ReportConflictsTemplateHitCOI_ByMatter
- ReportConflictsTemplateHitComponentGroups
- ReportConflictsTemplateHitCorporateTrees
- ReportConflictsTemplateHitExternalData
- ReportConflictsTemplateHitMatters
- ReportConflictsTemplateHitParties
- ReportConflictsTemplateHitPreviousSearches
- ReportConflictsTemplateHits
- ReportConflictsTemplateHitWatchList
- ReportRequestCompletion

Modified following functions:

- SearchComponentsByNotes

3.5 Bug Fixes

API

- The REST API was inaccessible from Integrate using the Flow datasource.
- The address type property was not included in REST Request methods
- The REST API incorrectly retried a Create call for a duplicate entity.
- Errors in REST Service were not logged to the log file.
- An error occurred when an updated group team name was sent twice via the UpdateGroup API.

Requests

- An answer was expected for a hidden grid sub-question in a custom grid, which prevented a row from being added.
- If incorrect answer values were passed from the parent request in the process of creating a sub-request, the sub-request creation failed and the parent request was suspended.
- An error occurred while converting a request that contained a grid sub-question with no reference name.
- When an integration took a long time to perform, the results were overwritten by changing the display condition before data has fully loaded.
- Answers could not be added to a grid if the grid triggered integration and multiple answers were permitted for the sub-question.
- When a question was updated before converting a request, a sub-question lookup displayed the default value rather than the updated value.
- An error occurred while converting a request with a grid question in a required question group.
- When a request was opened, the state selector was not available to a user with view-only access to multiple parallel states.

Tasks

- The task list search function could not find a task by its full name.

Designers

- In an older workflow, query integrations could not be saved when reminder notifications were not configured.
- An imported form definition could not be used if a deleted sub-question was used in the list of unique columns.
- A workflow running in the development environment tried to connect to a datasource in production during an Invoke Integration state.
- An error occurred when trying to import a form with a score level mapping that did not match the existing score definition.

Reports

- An error occurred after clicking the **update reports list** button if synchronization was already in progress.
- Values in the Analyst (Owner) lookup in Management Reports were erased after adding several users.
- The Request Completion Report displayed a graph with no data.

User Experience

- Dashboard widgets did not support UTC time format.

Data Management

- Links to disabled modules were shown in data management profiles.
- Created and Modified times in Data Management lists were drawn from different time zones.
- A party with a duplicate ID was saved, causing an error.
- Line breaks applied in the edit view are now preserved in the read-only view as well.

Mobile & iOS

- iOS: The title of a question group was shown regardless of display conditions.
- iOS: When a note created in the web application was viewed in iOS, spaces with new lines were rendered as special symbols.
- iOS: Within certain Blackberry MDM and Good MDM deployments, error messages appeared when requests were approved from mobile devices.
- Mobile Web/iOS: After opening a request created in the web application, multiple line answers were shown with HTML line breaks in the mobile application.
- Mobile Web: The main menu panel did not close after a menu item was selected.

Application Management

- A custom field query integration did not execute on a User Profile page if the profile was opened as a top-level search result.
- The application ignored the ExtendedSessionTimeout setting.
- Removal of a group member was not recorded in the Activities log.
- Text with non-ASCII symbols was displayed incorrectly after enabling the Terminology feature.
- Top level search returned confidential note results to a user without permission to see them.
- Top level search returned results from modules that were not enabled.

3.5 Hotfix 1

- Leading and trailing spaces were not stripped from party names during the save process.
- An error occurred on the e-mail lightbox when submitting draft e-mails.
- A "Null" option was displayed in "Type", "Affiliation", and "Relationship" fields from a related parties question.
- iOS: The application unexpectedly shut down when a task was renamed from the Inbox tab.
- A form section failed to load when the default address query integration returned a null value.

3.5 Hotfix 2

- Parties were sorted incorrectly by name in the Data Management Party list page.
- When setting up a management report, the Analyst (owner) drop-down list only returned the first 1,000 users ordered by Id.
- Request list state filters did not correctly filter for states with group names.

Bug Fixes: New Request Page

- Requests could not be put on hold or resumed from hold on the request page.
- The **Assign request** action was unavailable from the request page.
- Users were not warned about potentially missing information when incomplete data was added to grid answers.
- Data Management links for clients, matters, and parties were not displayed in smart lookups on the request page.

- Grids on the request page could not be configured to allow row re-ordering.
- User permissions were not displayed on the **People** tab of the request page.
- A user with access to multiple view-only states did not see the state selector when the request was opened.
- If a request contained a cancel section, the section became read-only after the request was put on hold.
- An integration did not correctly populate checkbox list questions in the Cancel section of a request.
- An integration did not correctly populate a smart lookup question when an empty question was used as a parameter.
- The chosen answer in a radio button list question was not displayed in a Cancel section.
- A colon appeared after question labels that end in punctuation marks.
- Certain complex scenarios of manipulating data in hierarchical grids could lead to a broken request page.

3.5 Hotfix 3

- A new user logged in using domain credentials was unable to generate a document in the new request form.
- Deletion of an attachment wasn't logged on request or data management pages.

3.6 New Features and Enhancements

Requests

- Requests can now be created from a URL on an external portal.
- Notifications are no longer sent automatically for successful request approvals via email – users will only be notified if the approval fails.

Form Designer

- Advanced validations are now available for date-time and numeric questions.
- "Restricted" display condition for grid questions allows only editing of existing rows, but forbids adding and deleting rows.

Notification Designer

- Notification templates can now be tested before being saved and deployed.
- More system fields are available in subject lines.
- Question-answers can now be used in the FROM field.
- Notifications can now be configured for distinct transitions within a workflow state (for example, one notification for Approve and another for Approve with Conditions).

User Experience

- Checkboxes and Radio Buttons with long strings wrap around correctly on the Request page.
- When a category has been specified while sharing, delegating or assigning a request, recipient users are directed to the specified section when opening the request.
- The Assign Request user interface has been simplified.

Mobile

- Improved initial login process for iOS application simplifies user experience.
- Central Mobile Server URL management hosted by Intapp can simplify mobile deployments.

- Touch ID (login with fingerprint) is now supported.
- Users are automatically logged out after 5 minutes.
- HTML tags are now rendered correctly in data provided by a query integration.
- Grid display conditions are now supported in Mobile Web..
- Intapp Flow™ Tasks for iOS includes the following functionality:
 - New tasks can be created from within the iOS application.
 - Tasks Assigned to You badge number is updated on the iOS application home screen.

Technical Requirements

- Support for Contract Express 5.4 and 5.5 has been added.
- Windows Edge browser is now supported. However, the Intapp browser plug-in will not work with Windows Edge to allow drag-and-drop attachment of email messages from MS Outlook, and the Document Assembly module is not currently supported with the Windows Edge browser.
- Updated Mobile Web requirements: iOS 9+, Android 4.4+, Blackberry Z30+

Installation

- For upgrades (not new installations), the new Client Matter Details Report is deployed in an inactive state. To use the report, customers must first flip the active flag for the report in the ReportTemplates table, then click **deploy reports** in the **Reporting Server** section of the **External Providers** tab in **System Administration**.
- FileStream support is now available. See the *Installation* guide for instructions.

3.6 Schema Changes

Note: This list of schema changes between Intapp Flow™ 3.5 and 3.6 does not include changes to procedures or functions and does not include new tables, views, procedures, functions, indexes or foreign key constraints. For a full list, please refer to the *Intapp Flow - Data Model* document.

ConflictsSearchReportPermissions

Added columns:

- [ConflictsSearchReportView_Id] [int] NOT NULL

ConflictsSearchReportResults

Added columns:

- [ConflictsSearchReportView_Id] [int] NOT NULL

ConflictsSearchReports

Removed columns:

- [SkipRestrictions] [int] NOT NULL DEFAULT ((0))

EMails

Added columns:

- [ConflictsSearchReportView_Id] [int] NULL

TermDocuments

Removed columns:

- [Fictive] [bit] NOT NULL DEFAULT ((0))

TermPropertyValues

Removed columns:

- [PropertyUnit_Id] [int] NULL

Terms

Added columns:

- [ApprovalStatus_Id] [int] NULL,
- [ModifiedOn] [datetime] NOT NULL DEFAULT (getdate())

UserPreferences

Added columns:

- [TermReviewReportListPreferencesXml] [nvarchar] (max) NULL,
- [TermsForReviewListPreferencesXml] [nvarchar] (max) NULL,
- [ReviewReportDetailsTermListPreferencesXml] [nvarchar] (max) NULL

Modified following procedures:

- OpenReportsClientMatterDetails
- ReportAssignResultCategory
- ReportConflictsTemplateAppliedRules
- ReportConflictsTemplateClientSummary
- ReportConflictsTemplateCoverPageSummary
- ReportConflictsTemplateHitBlackBooks
- ReportConflictsTemplateHitCOI
- ReportConflictsTemplateHitCOI_ByMatter
- ReportConflictsTemplateHitComponentGroups
- ReportConflictsTemplateHitCorporateTrees
- ReportConflictsTemplateHitExternalData
- ReportConflictsTemplateHitMatters
- ReportConflictsTemplateHitParties
- ReportConflictsTemplateHitPreviousSearches
- ReportConflictsTemplateHits
- ReportConflictsTemplateHitWatchList
- ReportConflictsTemplateSearchResultSummary
- ReportConflictsTemplateSearchStrategy
- ReportsRiskAnalysisSectorsTerms
- TermsOfBusinessReportsRiskAnalysisSectorsTerms

Modified following functions:

- GetTermDocumentsForEntity

3.6 Bug Fixes

Requests

- E-mail Approvals: the Approve link sent a reply to the notification sender rather than the configured Request approval mail account.
- The request list ignored times when sorting by a DateTime Request Custom Field column.

- The Share function remained visible in the gear menu after disabling 'Request Form Share button visibility.'
- A Boolean custom field was displayed as True/False instead of Yes/No in the Request list.
- Request list state filters did not correctly filter for states with group names.
- If a request moved to a state that includes a new assignment more than once, the second notification was not logged.
- Errors occurred when sharing a view-only state from the request list when the user has access to multiple parallel states.
- A request could not be converted when new columns were added to or removed from the grid definition.
- An error occurred after quickly deleting rows from grid questions in a request.
- An unclaimed request did not appear in the request list when the Unassigned sticky filter was applied by a user without request administration capabilities.
- A new Windows user was unable to generate a document on the new request page.

Designers

- In the workflow designer, a decision set as a destination of another decision was not validated.

Dashboard

- Dashboard display rows didn't expand properly for multiple parallel states.
- The **Requests Needing Your Approval** widget did not show the maximum possible requests if approval or decline actions took a long time to complete.

Notifications

- Notifications could not be opened or created if the Tasks module was enabled in Flow.
- For sent notifications with Approve/Decline buttons, the Activities page failed to log recipients and the To: field in the view notification pop-up was empty.
- Line breaks were not respected when a multi-line question-answer was used in notifications.

Mobile & iOS

- iOS/ Mobile Web: If the user has access to multiple view-only states, the menu did not contain a state selector.
- iOS/Mobile Web: After a transition to a parallel state, the request opened using the form for a different parallel state.
- The Mobile Web application did not work properly when opened through an action link in a notification email.
- Mobile Web: YES/NO buttons were displayed on top of the corresponding questions, which ran off the screen.
- Mobile Web: An incorrect state header was shown in a parallel state.
- iOS/Mobile Web: Fields with rich text formatting were displayed with HTML tags.

Application Management & API

- Regardless of timeout configurations, sessions expired automatically after 30 minutes due to Windows authentication default settings.
- API: After a lookup custom field was updated via API, lookup questions using the custom field displayed invalid answers.
- An error occurred if the FlowDb and SQL server had different collation types.

3.6 Hotfix 1

- Notification e-mails contained extra vertical spacing.
- When a request section contained a grid question with a required field, the next step information bar incorrectly prompted users to complete the section after it was completed and approved.
- If a request contained a smart lookup with a datasource integration that returned duplicate values, then the request page did not load.
- For firms that use a secured browser for Mobile Web access (on mobile devices), notification links didn't work.
- Users were unable to enter their email addresses when initializing the iOS application after App Store download.
- User could not close cancel section lightbox if it contained smart lookup question linked to an integration with parameter.
- The request page was slow to open since the integration for a lookup question datasource was executed every time the request page was loaded.
- Labels for workflow transitions were incorrectly capitalized.

3.6 Hotfix 2

- Integrations were not triggered if any parameter was left with a null value.
- If an integration failed to be invoked in a parallel state, the request was left without a state and could not be edited or moved.
- A notification e-mail sent on state transition events like Approve, Decline, Cancel, etc. contained an action button for a state that had already been approved.
- Within the Form Designer, the Form Answers drop-down for a requirement group question did not show any options until the page was refreshed.
- In Internet Explorer 11, scrolling through a smart lookup could cause results filters to be lost.
- When using advanced conditional logic in display conditions, workflow routing, etc., an incorrect order of operations was applied to certain combinations of lowercase Boolean operators without parentheses.
- If a form contained a radio button question with a " in one of its answers, no answers in the request could be updated.
- Some requests were unable to complete a Move operation.
- If the email synchronization process caused an email to be fetched for approval processing before its recipients were created in the database, approvals could fail.
- When a custom field was tied to a lookup question, the selected answer was not saved upon refreshing the request.
- A table question's answer was not updated if its visibility was changed.
- After an upgrade to 3.6, documents could not be generated within the Document Assembly module using Contract Express 5.2.