

**APTTUS**

---

**X-Author for Excel February 2017 Patch 2  
Release Notes**

06 April 2017

# Table of Contents

<b>Installation Components</b>	<b>5</b>
<b>Minimum Supported Versions</b>	<b>7</b>
<b>Feature Summary</b>	<b>8</b>
<b>Data Migration Wizard Enhancements</b>	<b>8</b>
Add Lookups: Defining the Lookup Source	8
Data Migration: Disable Worksheet	13
	14
<b>Favorite Filters</b>	<b>14</b>
Enabling Favorite Filters	14
Using Favorite Filters	15
<b>Resolved Issues</b>	<b>18</b>

## Release Notes

Apttus Release Notes contain the following information about this release:

- [Installation Components](#): that are required to upgrade to this release.
- [Minimum Supported Versions](#): minimum Office versions by operating system.
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features, with links to Get Started topics to help you set up and use the new feature or enhancement.
- [Resolved Issues](#): A list of customer issues resolved in this patch.



This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

# Installation Components

The following packages and dependent packages are required to upgrade to this release. These are the *minimum* required versions; later versions are also supported. The packages marked as **(New)** are new packages for this release and must be installed to upgrade to this version.

	Product	Version	Product Edition
Salesforce Installed Packages	Apttus X-Author For Excel	4.40.1	Power Admin Enterprise Essentials Presto
	Apttus X-Author Designer for Excel	1.9	Power Admin Enterprise Essentials Presto
	Apttus X-Author for Excel Document Generation	1.0	Presto
	Apttus X-Author for Excel (Power Admin)	1.0	Power Admin

Release Notes

	<b>Product</b>	<b>Version</b>	<b>Product Edition</b>
Microsoft Office Add-in	Apttus X-Author for Excel: Runtime Only (English) <b>(New)</b>	5.1.0405	Power Admin Enterprise Essentials Presto
	Apttus X-Author Designer + Runtime Add-in (English) <b>(New)</b>	5.1.0405	Power Admin Enterprise Essentials Presto
Microsoft Office Versions	2016 2013 2010		
Supported Operating System	Windows 10 Windows 8.1 Windows 8 Windows 7		

# Minimum Supported Versions

<b>Windows Version</b>	<b>Microsoft Office Versions</b>
Windows 7	Office 2007, 2010, 2013
Windows 8, 8.1	Office 2007, 2010, 2013, 2016
Windows 10	Office 2007, 2010, 2013, 2016

# Feature Summary

The following features are new to X-Author for Excel in this release.

- [Data Migration Wizard Enhancements](#)
- [Favorite Filters](#)

## Data Migration Wizard Enhancements

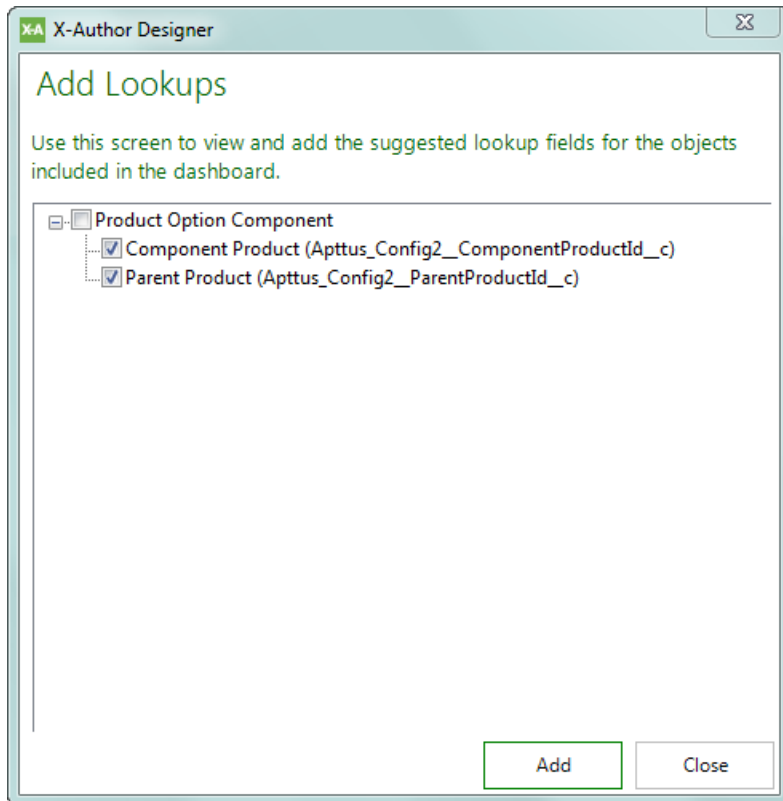
The following enhancements have been made to the Data Migration Wizard to accommodate scenarios in which there is more than one lookup to the same object.

### Add Lookups: Defining the Lookup Source

Data Migration Wizard designers can now choose which object to use as the lookup source for each lookup field added to a data migration object. This enhancement is intended to provide a solution for separate data sets from the same lookup object to be used as action input for a step in a data migration app action flow.

## To create more than one lookup source to the same object

1. Add at least two lookup fields to your data migration object that look up to the same object.





## Release Notes

2. From the Data Migration Wizard screen, copy the lookup object so that there are two entries for the same object in the wizard.

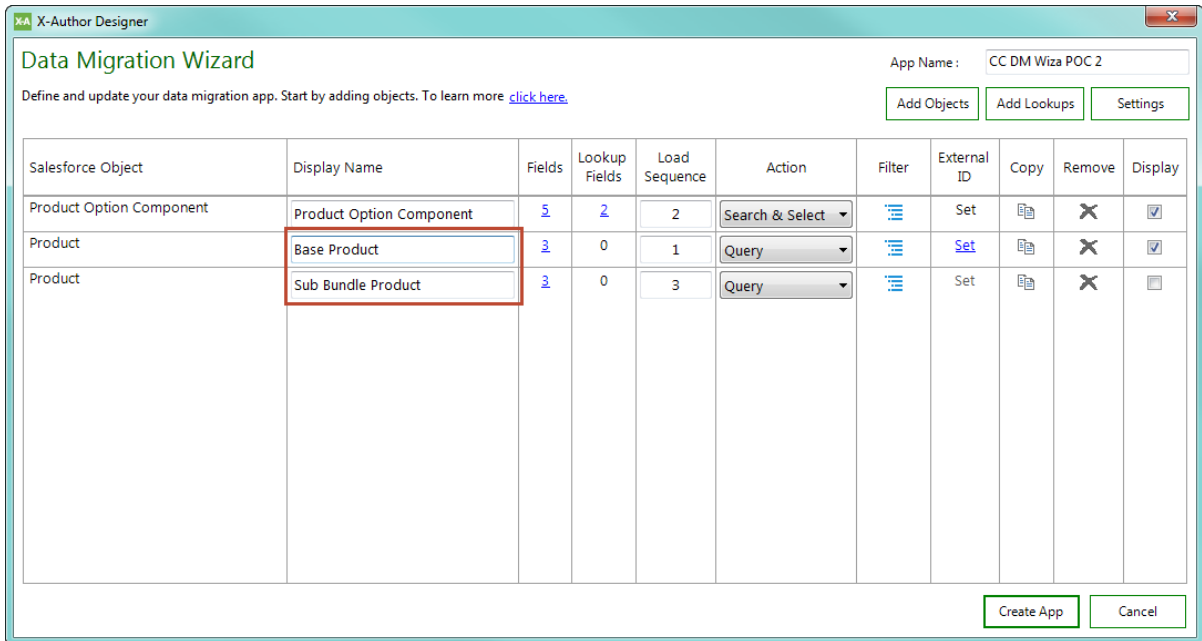
App Name: CC DM Wiza POC 2

Add Objects Add Lookups Settings

Salesforce Object	Display Name	Fields	Lookup Fields	Load Sequence	Action	Filter	External ID	Copy	Remove	Display
Product Option Component	Product Option Component	5	2	2	Search & Select		Set			<input checked="" type="checkbox"/>
Product	Product	3	0	1	Query		Set			<input checked="" type="checkbox"/>
Product	Product	3	0	3	Query		Set			<input type="checkbox"/>

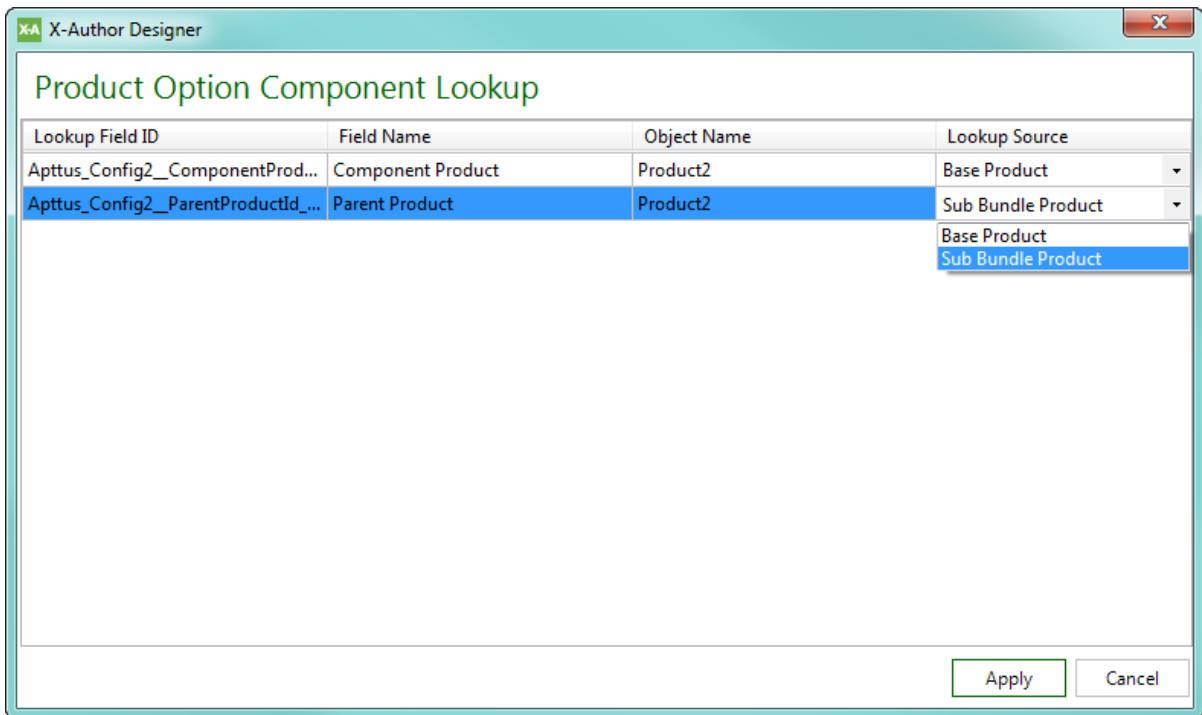
Create App Cancel

3. Change the **Display Name** of each lookup object to reflect the lookup source. For example, the display name of the lookup object for the Component Product could be "Base Product" and the display name of the lookup object for the Parent Product could be "Sub Bundle Product."

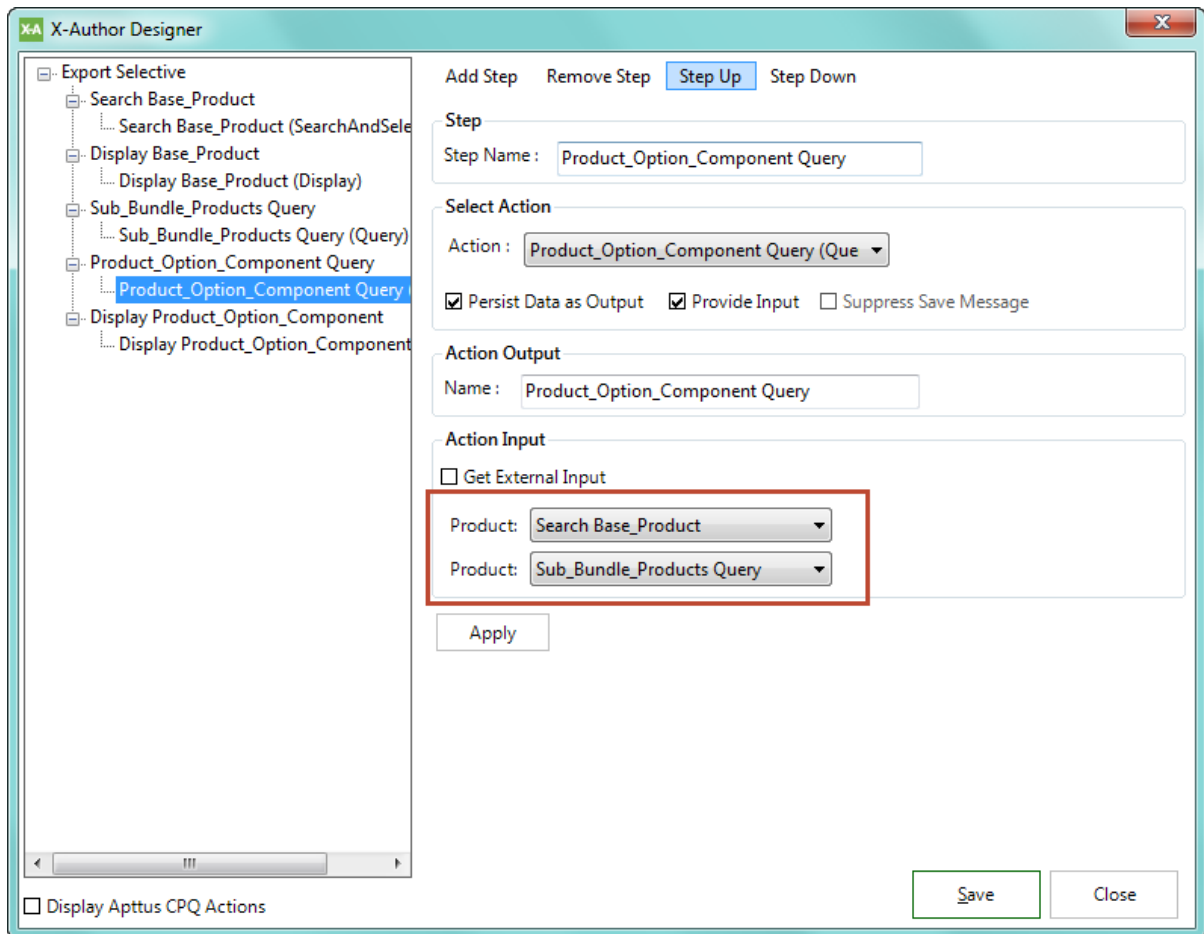


4. Click on the **Lookup Fields** link for the object that contains the lookups.
5. Change the **Lookup Source** value to the object you want to act as the source input for each lookup field and click **Apply**.

## Release Notes



After you create or update the wizard, check the appropriate "Export" action flow step that corresponds to the data migration object action. Each Lookup Source you selected in the data migration lookup window is listed under "Action Input" for the step.



When the migration is executed at runtime, actions from each lookup source will retrieve a combination of records based on the complete data set.

## Data Migration: Disable Worksheet

By default, each object you add to your Data Migration app representing a Query or Search & Select action creates a separate worksheet to retrieve data for migration. Designers now have the option to disable creation of a worksheet for specific objects defined in the app. To disable the worksheet for an object, click the corresponding check box under the **Display** column. After you create the app, the resulting workbook will not create a worksheet for the disabled objects. Any queries for those objects will still execute—the output from those queries can still be used as input for other actions in the migration).


## Release Notes

In the below example, the "Sub Bundle Products" object query retrieves data that is then used by the "Product Option Component" query to retrieve records for migration and populated in the *Product\_Option\_Component* worksheet. Because "Sub Bundle Products" is only used as input for another query, a worksheet is not required for that data.

For step-by-step instructions on creating a Data Migration Wizard, refer to [Using the Data Migration Wizard](#) in the X-Author for Excel Designer and Runtime guide.

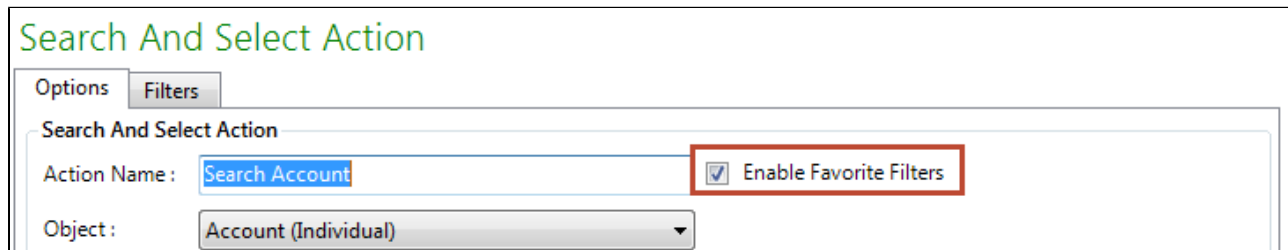
## Favorite Filters

The Favorite Filter enhancement allows runtime users to create preferred views by saving and reusing filters created for executed Search & Select and Query actions. These Favorite Filters are unique to each user and saved locally. Each app can have more than one Favorite Filter, and they can be used by the same user across more than one app.

 The examples shown in the following sections are for a Search & Select action—the same filters can be created with a Query action requiring user input.

### Enabling Favorite Filters

Designers can enable Favorite Filters when creating Search & Select or Query actions for any app. To enable Favorite Filters for a specific action, create a new action or edit an existing one and click the check box **Enable Favorite Filters**.



**Search And Select Action**

Options Filters

Search And Select Action

Action Name:   Enable Favorite Filters

Object:

## Using Favorite Filters

Runtime users can create and reuse Favorite Filters for any action in any app where the feature was enabled by the designer. The option to create and use Favorite Filters appears when the specified action executes as part of an action flow or when manually triggered. When a new Favorite Filter is created by a user, it is stored locally on their system and made available as a Favorite Filter *for any enabled action for any app they use*.

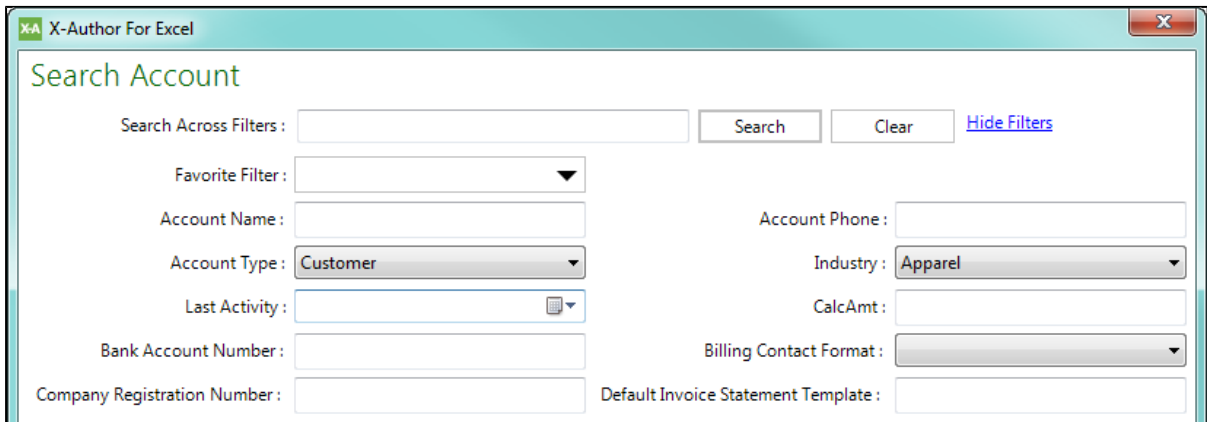
### Note

As Favorite Filters are saved locally by user, filters created by one user will not work on the system of any other user.

## To add a new Favorite Filter

When a Search & Select or Query action executes that requires input from the runtime user, and Favorite Filters are enabled, the user can create a filter as normal and add it as a new, reusable filter.

1. Open an app and retrieve data that requires user input (Search & Select or Query screen).
2. From the action window, search for and filter the list of retrieved data.

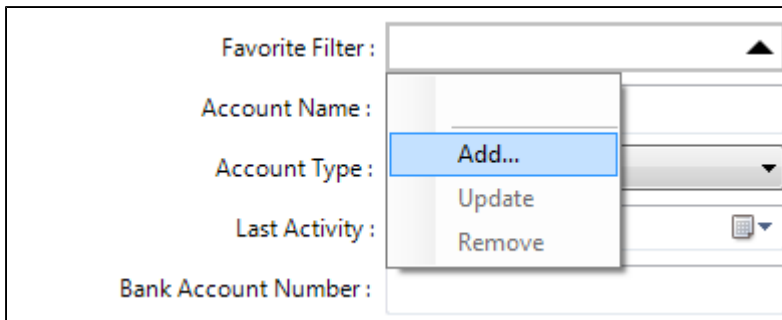


The screenshot shows a window titled "X-Author For Excel" with a "Search Account" form. The form includes the following fields and controls:

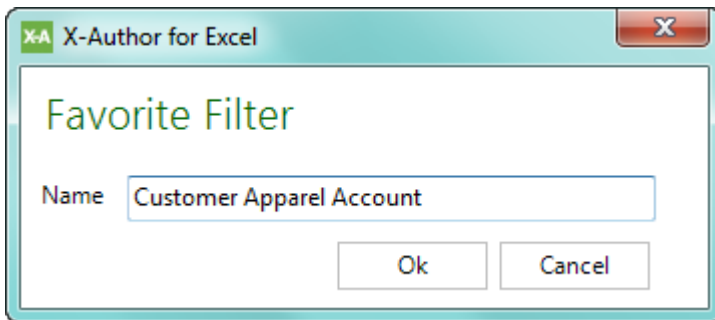
- Search Across Filters:** A text input field followed by "Search", "Clear", and "Hide Filters" buttons.
- Favorite Filter:** A dropdown menu.
- Account Name:** A text input field.
- Account Type:** A dropdown menu with "Customer" selected.
- Account Phone:** A text input field.
- Last Activity:** A text input field with a calendar icon.
- Industry:** A dropdown menu with "Apparel" selected.
- Bank Account Number:** A text input field.
- CalcAmt:** A text input field.
- Company Registration Number:** A text input field.
- Billing Contact Format:** A dropdown menu.
- Default Invoice Statement Template:** A text input field.

## Release Notes

3. Click on the Favorite Filter drop-down and select **Add...**



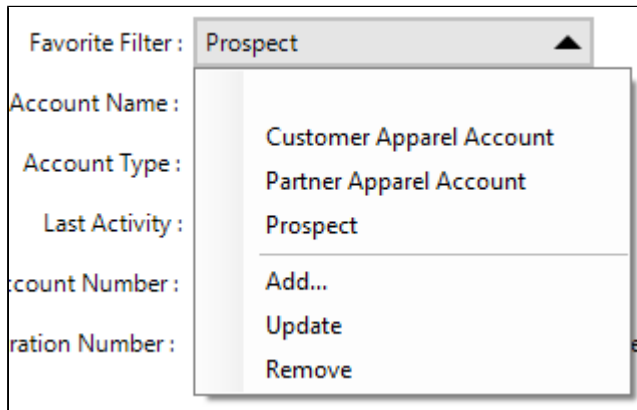
4. In the Add Filter dialog, enter a name for your Favorite Filter and click **OK**.



5. Select the new filter from the drop-down. Your filter is now saved and can be reused for any enabled action.

## To use or reuse a Favorite Filter

1. Open an app and click on a user menu button to retrieve data that requires user input (Search & Select or Query).
2. Click on the Favorite Filter drop-down and select a Favorite Filter from the list.



3. Execute the action.

### To update a Favorite Filter

1. Open an app and click on a user menu button to retrieve data that requires user input (Search & Select or Query).
2. Click on the Favorite Filter drop-down and select a Favorite Filter from the list.
3. Change the value or values of any filter for the action.
4. Click on the Favorite Filter drop-down and select **Update**.
5. Choose the updated Favorite Filter from the drop-down to use the updated filter.

### To remove a Favorite Filter

1. Open an app and click on a user menu button to retrieve data that requires user input (Search & Select or Query).
2. Click on the Favorite Filter drop-down and select a Favorite Filter from the list.
3. Click on the Favorite Filter drop-down and select **Remove**.

For more information on Action Flows and data retrieval actions, refer to the [X-Author for Excel February 2017 Designer & Runtime guide](#).



# Resolved Issues

The following table represents resolved issues for the release dated: 6 April, 2017

Case Number	Description	Apttus Internal Case Number
	After creating a data migration app using the Data Migration Wizard, editing Save Actions showed the "Enable Partial Save" setting as unchecked, even though the feature was enabled. This issue has been resolved.	AB-2754
	Formula text fields, Multi-select picklists and Editable picklists were not supported for grouping and sorting in Display Maps. This issue has been resolved.	AB-2794

### Apttus Copyright Disclaimer

Copyright © 2017 Apttus Corporation (“Apttus”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Apttus. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Apttus makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this

document may contain descriptions of software modules that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document.

**U.S. GOVERNMENT END USERS:** Apttus software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Apttus and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus and X-Author are registered trademarks of Apttus and/or its affiliates.

The documentation and/or software may provide links to Web sites and access to content, products, and services from third parties. Apttus is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Apttus is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Apttus is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

For additional resources and support, please visit <https://apptusportal.force.com/community>.