

**APTTUS**

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

13 February 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</b>	<b>8</b>
Get Started	9
<b>Support for Base64 Datatype</b>	<b>9</b>
Get Started	11
<b>Resolved Issues</b>	<b>12</b>

## Release Notes

Apttus Release Notes contain the following information about this release:

- [Installation Components](#): that are required to upgrade to this release.
- [Feature Summary](#): high-level descriptions of new features and enhancements to existing features, with links to Get Started topics to help you set up and use the new feature or enhancement.
- [Resolved Issues](#).



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# 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

	Product	Version	Product Edition
Microsoft Office Add-in	Apttus X-Author for Excel: Runtime Only (English) <b>(New)</b>	5.0.0207	Power Admin Enterprise Essentials Presto
	Apttus X-Author Designer + Runtime Add-in (English) <b>(New)</b>	5.0.0207	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

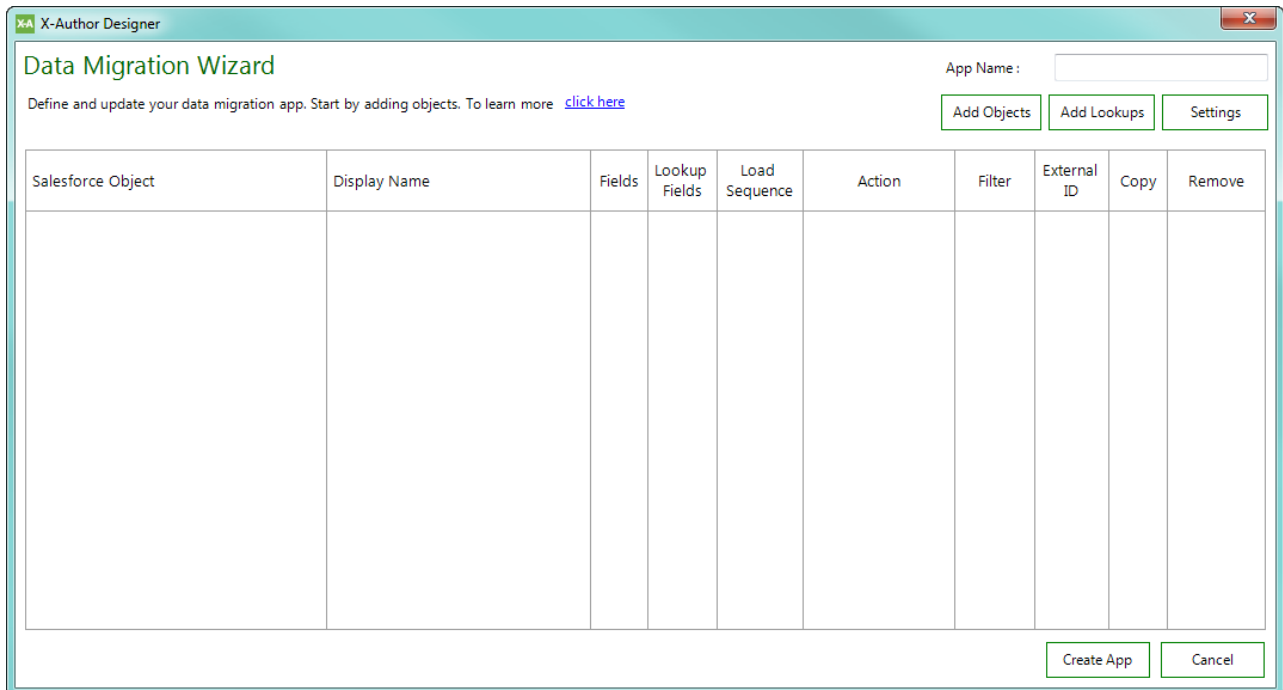
# Feature Summary

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

- [Data Migration Wizard](#)
- [Support for Base64 Datatype](#)

## Data Migration Wizard

The release of X-Author for Excel introduces a built-in solution for migrating data from one Salesforce org to another with the **Data Migration** wizard. Using the Wizard, you can choose Objects, Fields and related Lookups to build an app configured to retrieve data from the connected Salesforce org and save data to a target org. The wizard takes care of all display maps, save maps, actions flows and user menus so you have an app ready to use when you are done. As a designer, you can also customize the app after completing the wizard steps to tailor it to your requirements.



## Get Started

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.

## Support for Base64 Datatype

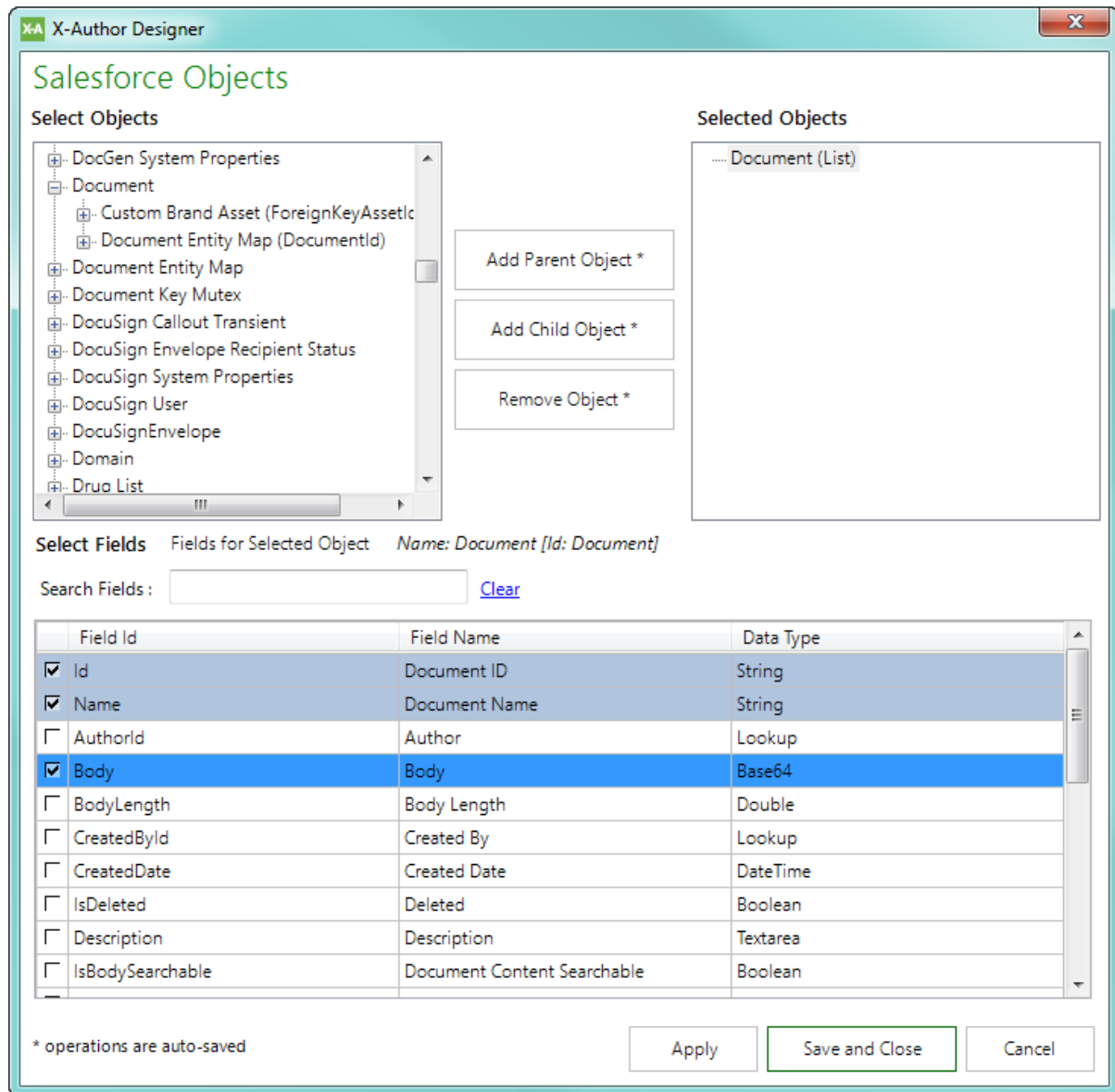
X-Author is being enhanced to add support for Salesforce's **Base64** datatype.

This enhances X-Author's existing data migration functionality by expanding support to Agreement Documents and other custom objects that use Base64 fields. Designers can now add Base64 fields to *Display Maps* and *Save Maps*.

The following shows an example of the Body field (Base64 type) of the Document as used in an app.



## Release Notes



When an app retrieves data from Salesforce:




- Body fields will populate in the app with the local document file path (e.g., "C:\Users\XAuthorUser\AppData\Local\Temp\X-Author Attachments\[Attachment File Name]")
- The file corresponding to the retrieved file path will be created.

When data is saved to Salesforce from the app:

- X-Author checks that the file path, file name and extension point to a valid file.
- X-Author saves the file, converts it to a Base64 string and saves it to Salesforce.

### Note

- The *Document Name* and *File Extension* fields must always be included in any Display Map (see example below).

Mapped Details				
<input type="checkbox"/>	Name	Location	Type	
<input type="checkbox"/>	Document.Body	Sheet1!\$A\$2	List	
<input type="checkbox"/>	Document.Document Name	Sheet1!\$B\$2	List	
<input type="checkbox"/>	Document.File Extension	Sheet1!\$C\$2	List	

- At this time, the **Base64** data type is only supported for fields in repeating objects.
- Fields of the **Base64** type cannot be used in filter criteria.

## Get Started

For more information on adding fields to Display and Save Maps, refer to [Adding Salesforce Objects to your App](#) and [Customizing the App Experience](#) (Display Maps and Save Maps).

## Resolved Issues

The following table represents resolved issues for the release dated: 13 February, 2017

<b>Case Number</b>	<b>Description</b>	<b>Apttus Internal Case Number</b>
	Cell reference chunking was failing due to longer strings as individual values. This issue has been resolved.	AB-2677
	With queuing enabled in Salesforce, the Owner Name field look up to the User Object was not functioning correctly. This issue has been resolved.	AB-2678