APTTUS

X-Author for Excel May 2017 Release Notes

26 May 2017

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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: A list of customer issues resolved in this patch.
- Known 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
Microsoft Office Add-in	Apttus X-Author for Excel: Runtime Only (English) **(New)**	5.1.0523	Power Admin Enterprise Essentials Presto

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	Product	Version	Product Edition
	Apttus X-Author Designer + Runtime Add-in (English) **(New)**	5.1.0523	Power Admin Enterprise Essentials Presto
Microsoft Office Versions	2016 2013 2010		
Supported Operating System	Windows 10 Windows 8.1 Windows 8 Windows 7		

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Minimum Supported Versions

Windows Version	Microsoft Office Versions
Windows 7	Office 2007, 2010, 2013
Windows 8, 8.1	Office 2007, 2010, 2013, 2016
Windows 10	Office 2007, 2010, 2013, 2016

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Feature Summary

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

- Sync App
- Data Migration Wizard Enhancements
- Favorite Filters

Sync App

X-Author for Excel Designer can now display missing objects, field and mismatched data types used in an app when they do not match corresponding data in Salesforce. You can use the new "Sync App" action from the Admin section of the X-Author Designer ribbon to review and correct discrepancies between your app and Salesforce data.

Using Sync App, you can view and correct the following data mismatches between your app and Salesforce:

- **Objects** – View all objects in your app that do not match objects in the connected Salesforce org. You must manually remove these objects from your app or add or make them available in Salesforce.
- **Fields** – View all fields in your app present in one or more Display Maps, Save Maps or Search Filters that do not match objects in the connected Salesforce org. Use Sync App to select and remove these fields from Display Maps and Save Maps. In most cases you must manually remove fields from your search and query filters.
- **Field Data Types** – View all mismatched field data types that exist in your app. Use Sync App to correct all mismatched data types in your app with data types from Salesforce.
- **Picklists** – Review the total number of Picklist fields (not values) synced between the app and Salesforce (based on Salesforce data) in the Summary. No user intervention is required.

This feature replaces the previous **Validate** feature in the ribbon. With Sync App, you have more control to validate objects and fields and to make corrections when there are differences between your app data and Salesforce org.

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Missing/Inaccessible Objects and Fields

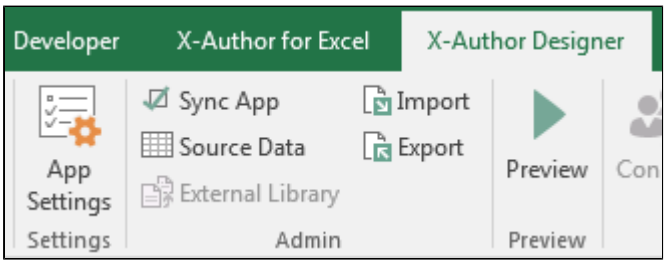
Keep in mind that when you sync apps, some mismatches may be displayed because your user profile or individual permissions do not allow you to access them. **Before taking any action based on the Sync App dialog, check with your administrator to make sure that no permission issue exists** that is preventing you from accessing objects or fields used in the app.

Note

The Sync App feature is not compatible with Quick Apps.

To view and sync missing or inaccessible objects

1. From the X-Author Designer ribbon, open the app you want to sync.
2. From the Admin section of the X-Author Designer ribbon, click **Sync App**.



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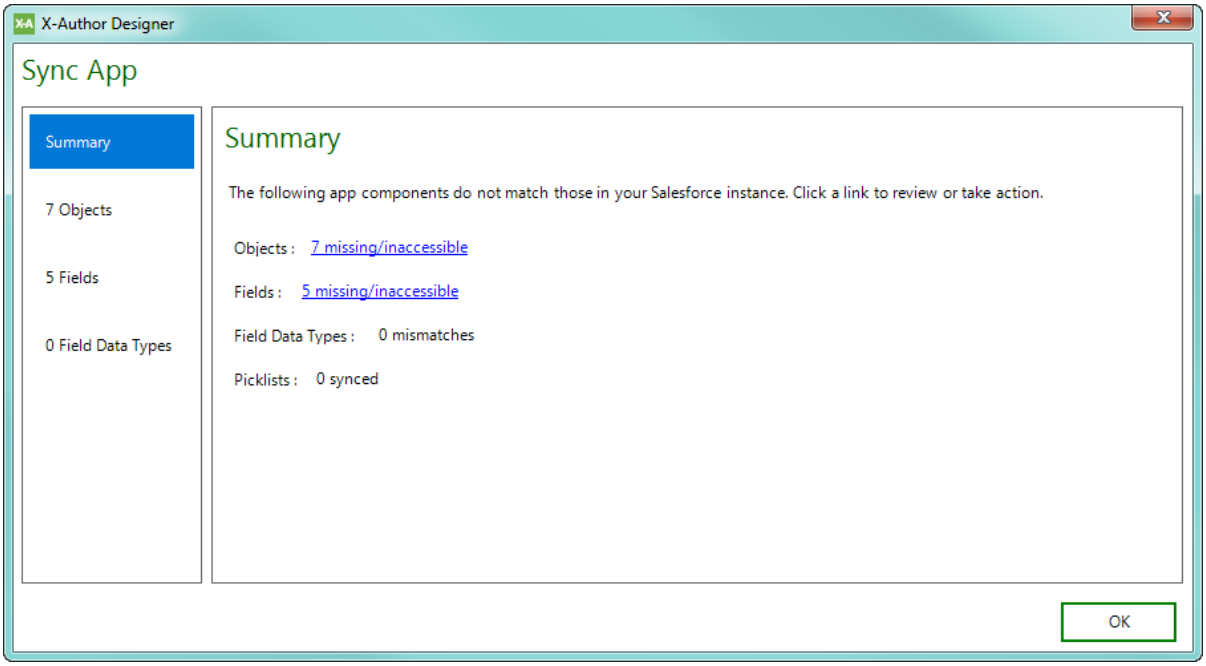
3. Review the Sync App summary. Click the link next to Objects in the Summary or on # **Objects** in the sidebar.



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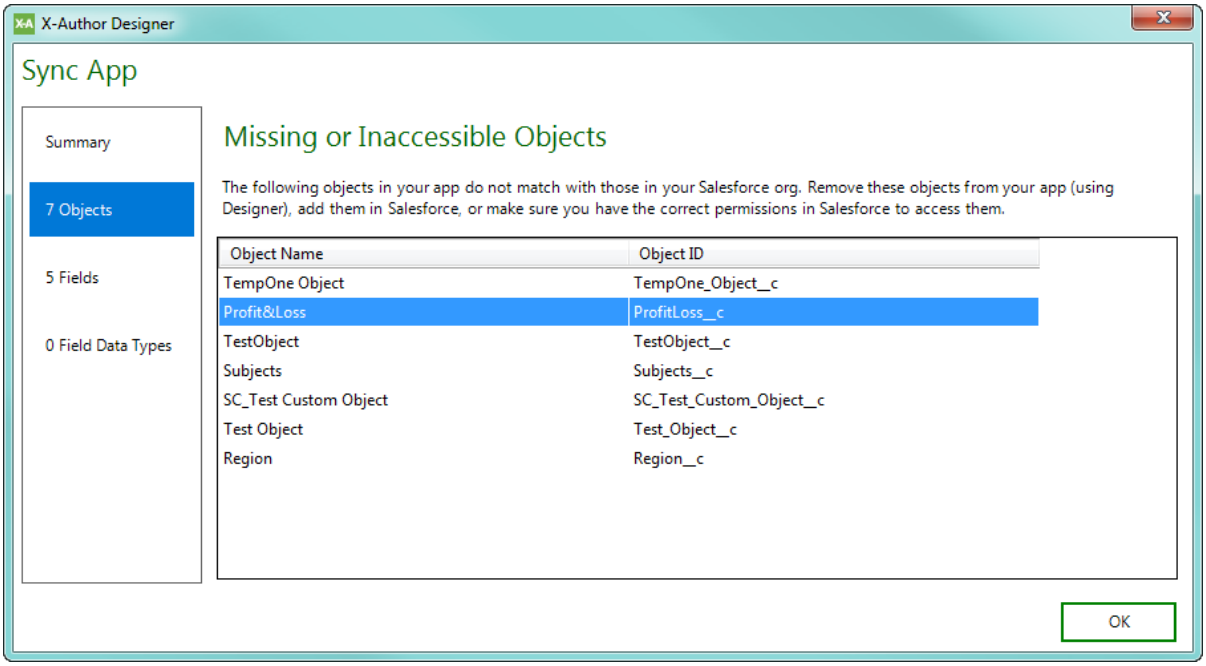
4. Review the Missing or Inaccessible Objects screen. This screen displays a list of Object Names and Ids that exist in your app but do not match objects in the connected Salesforce org (either because they do not exist or you do not have access). The total number of object mismatches is displayed in the Sync App dialog sidebar (for example, "2 Objects").



5. To sync your app with Salesforce, you must **manually remove the objects from your app** (using Salesforce Objects) or add them in Salesforce. If you determine that an object was displayed due to a permissions issue, a Salesforce administrator must modify permissions for the specified object.

> It is strongly advised to sync fields before manually removing any objects from your app, as fields from the object you want to remove may be used in Display Maps, Save Maps or Search and Query filters (see below).

To view and sync missing or inaccessible fields

1. From the X-Author Designer ribbon, open the app you want to sync.
2. From the Admin section of the X-Author Designer ribbon, click **Sync App**.

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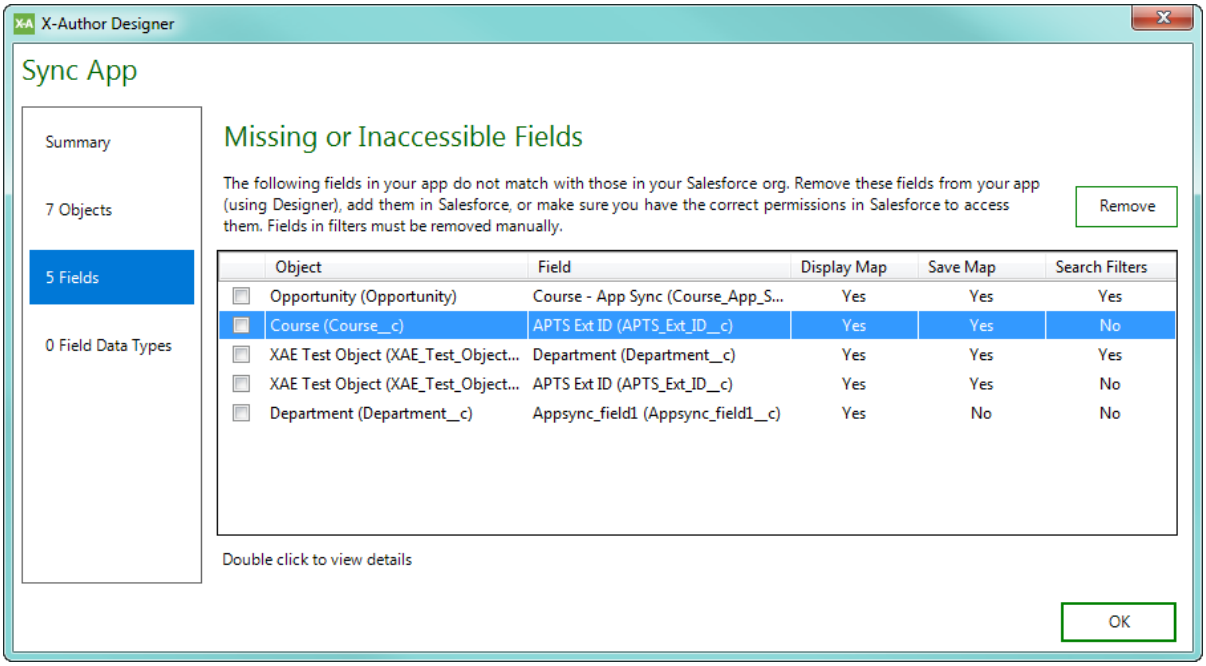
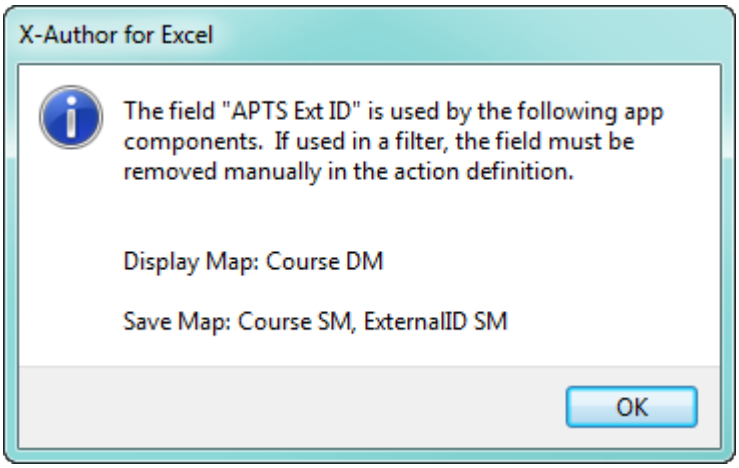
3. Review the Sync App Summary. Click the link next to Fields in the Summary or on **# Fields** in the sidebar.



4. Review the list of missing or inaccessible fields. This screen displays all of the fields that exist in your app that do not match a field in the connected Salesforce org for a given object. For each field, the Display Map, Save Map and Search Filters columns indicate whether the field is used in one or more Display Maps, Save Maps or Search/Query Filters, respectively.
5. Double-click on a row to display a pop-up and to view all areas of the App with that field.



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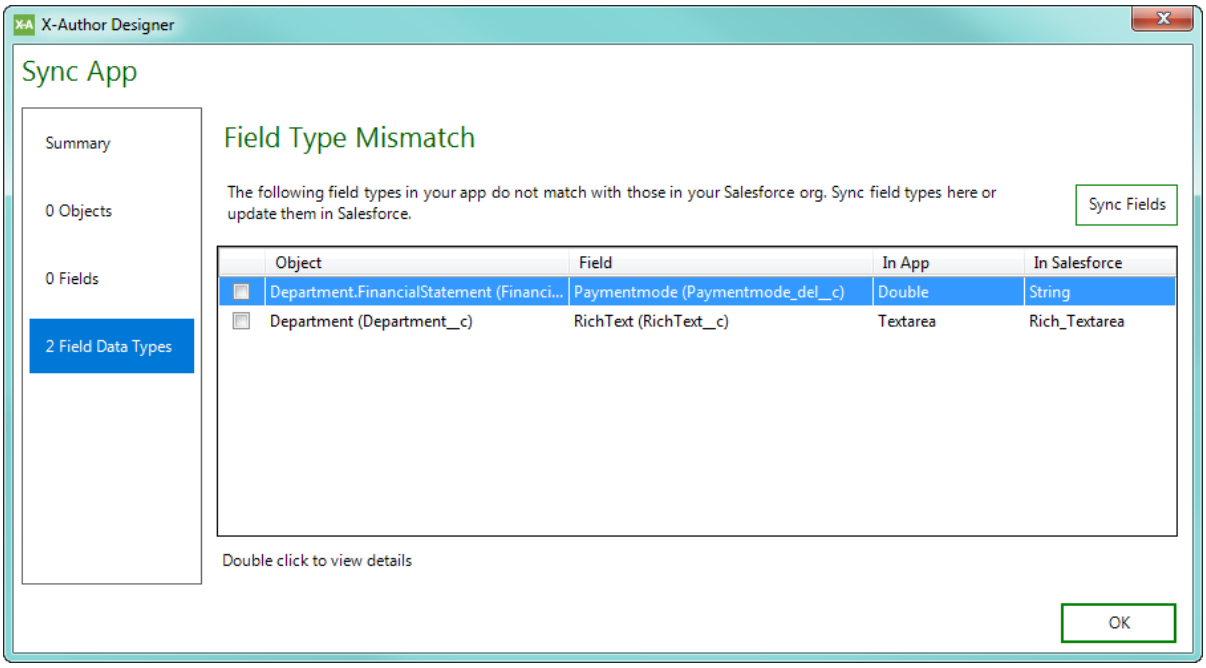
6. If you decide to remove any of the fields in the list from your app, click one or more check boxes corresponding to the fields you want to remove and click **Remove**.

> Fields used in Search & Select and Query filters are only removed in this way if the filter type is "User Input" and there is no Filter Logic defined. In all other cases, you must go to the filter and manually remove it from your app.

7. Click **OK** to close the Sync App dialog.
8. Click **Save App** to save the changes you made to your app.

To view and sync field data types

1. From the X-Author Designer ribbon, open the app you want to sync.
2. From the Admin section of the X-Author Designer ribbon, click **Sync App**.
3. Review the Sync App Summary. Click the link next to Field Data Types in the Summary or on **# Field Data Types** in the sidebar.



4. Review the list of mismatched field data types.

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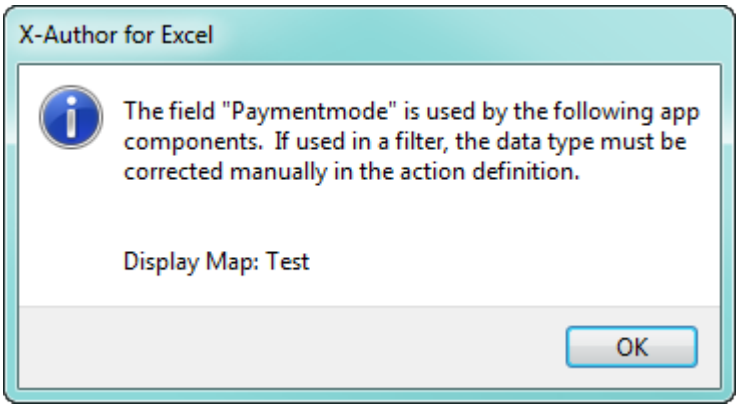
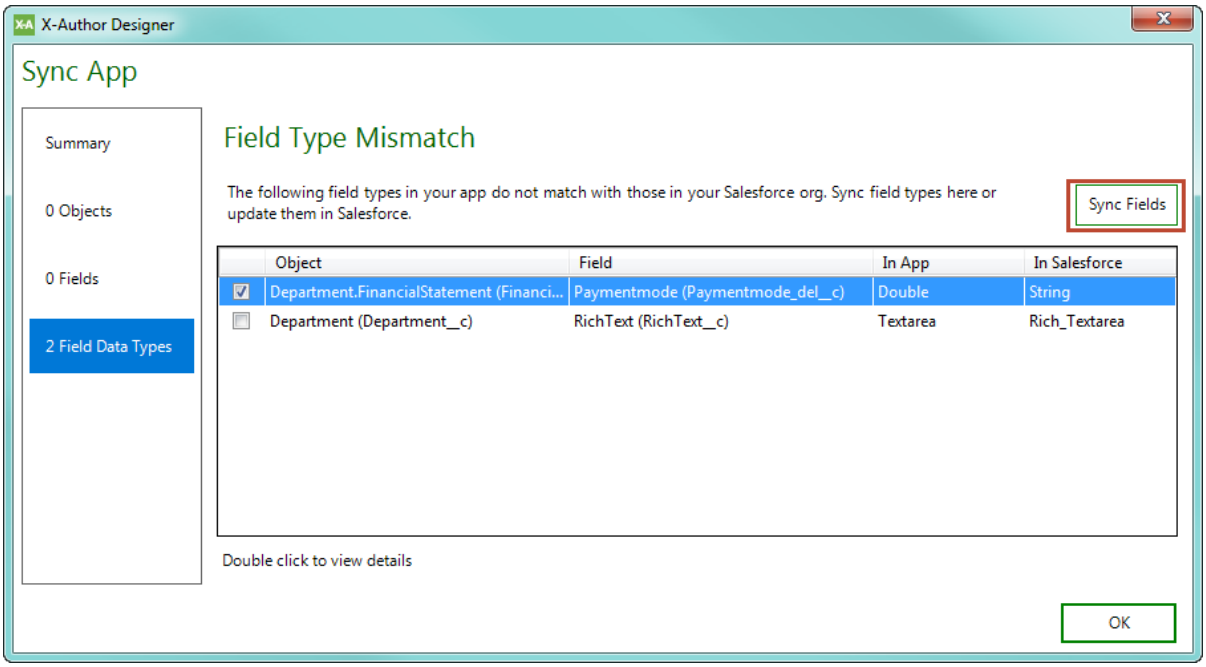
5. Double-click on a row to display a pop-up and to view all areas of the App with that field.



6. To sync incorrect data types with the data types in Salesforce, select on or more check boxes and click **Sync Fields**.



7. Click **OK** to close the Sync App dialog.

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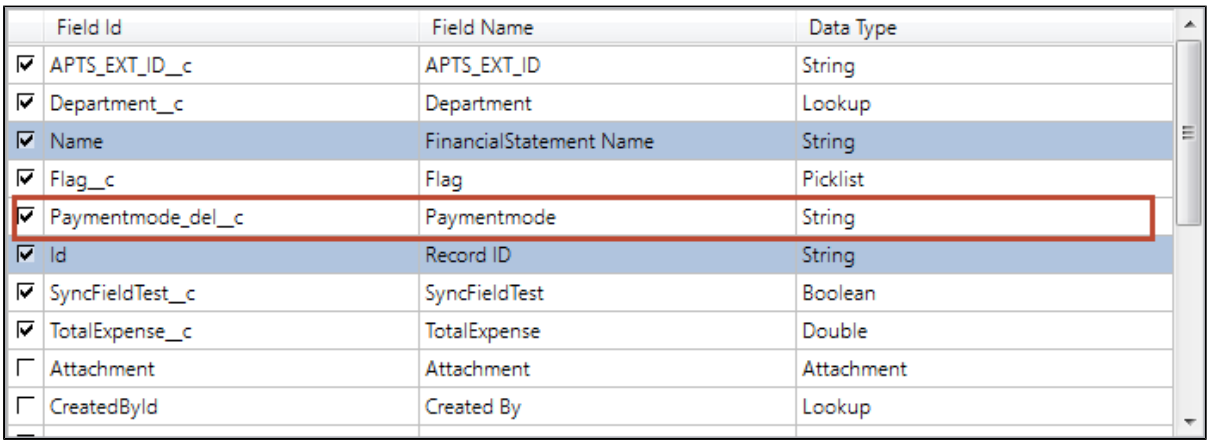
8. Click **Salesforce Objects** to verify that the field types have been properly synced.



	Field Id	Field Name	Data Type
☑	APTS_EXT_ID__c	APTS_EXT_ID	String
☑	Department__c	Department	Lookup
☑	Name	FinancialStatement Name	String
☑	Flag__c	Flag	Picklist
☑	Paymentmode_del__c	Paymentmode	String
☑	Id	Record ID	String
☑	SyncFieldTest__c	SyncFieldTest	Boolean
☑	TotalExpense__c	TotalExpense	Double
☐	Attachment	Attachment	Attachment
☐	CreatedById	Created By	Lookup

9. Click **Save App** to save your changes.

Best Practice

After you have performed all Sync App operations, choose Sync App again to double-check that there are no more mismatches or discrepancies to validate against Salesforce.

The following features were originally introduced in X-Author for Excel February 2017 Patch 2.

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.

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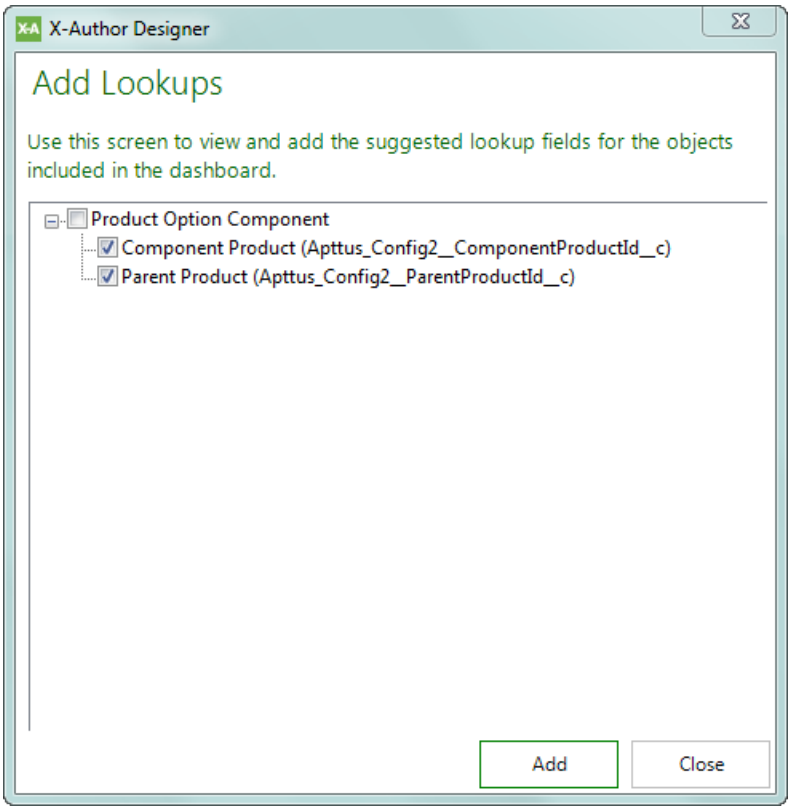
To create more than one lookup source to the same object

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



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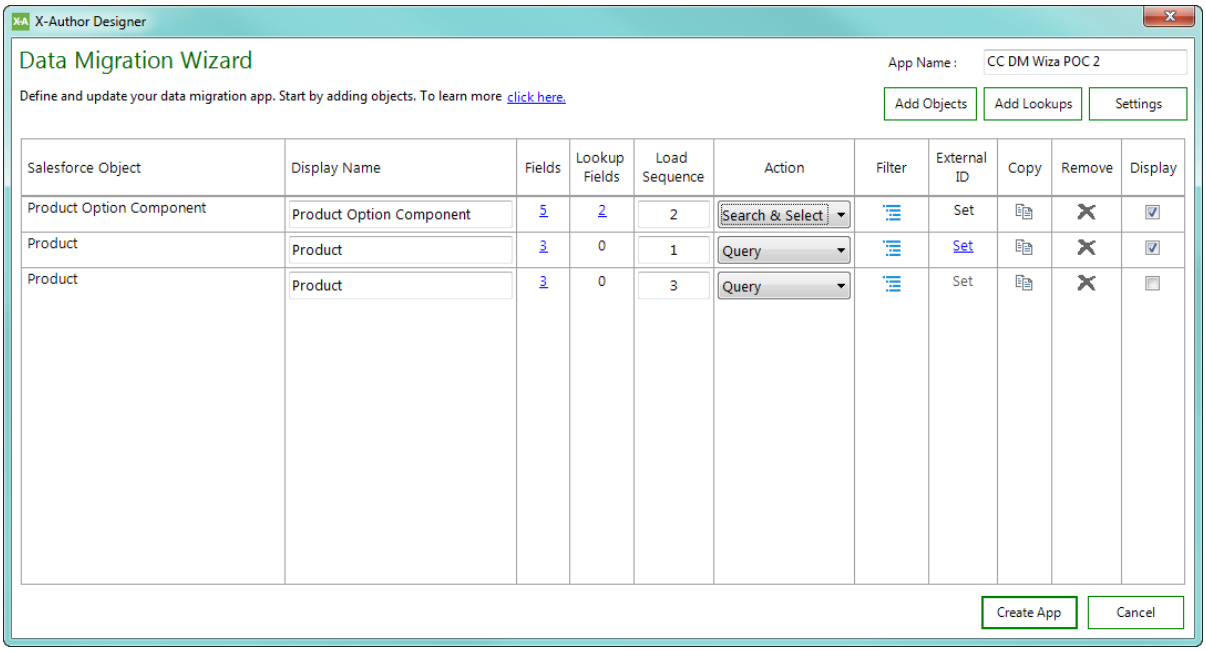
2. From the Data Migration Wizard screen, copy the lookup object so that there are two entries for the same object in the wizard.



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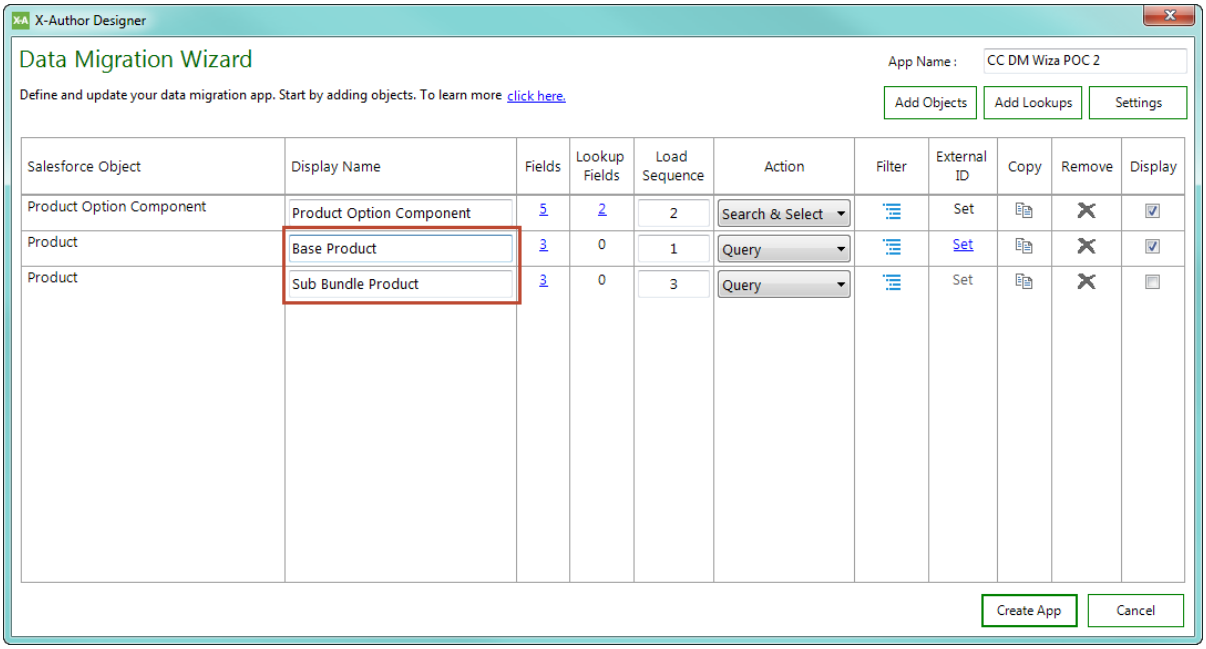
3. Change the **Display Name** of each lookup object to reflect the lookup source. For example, the display name of the lookup object for the Component Product could be "Base Product" and the display name of the lookup object for the Parent Product could be "Sub Bundle Product."



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**.

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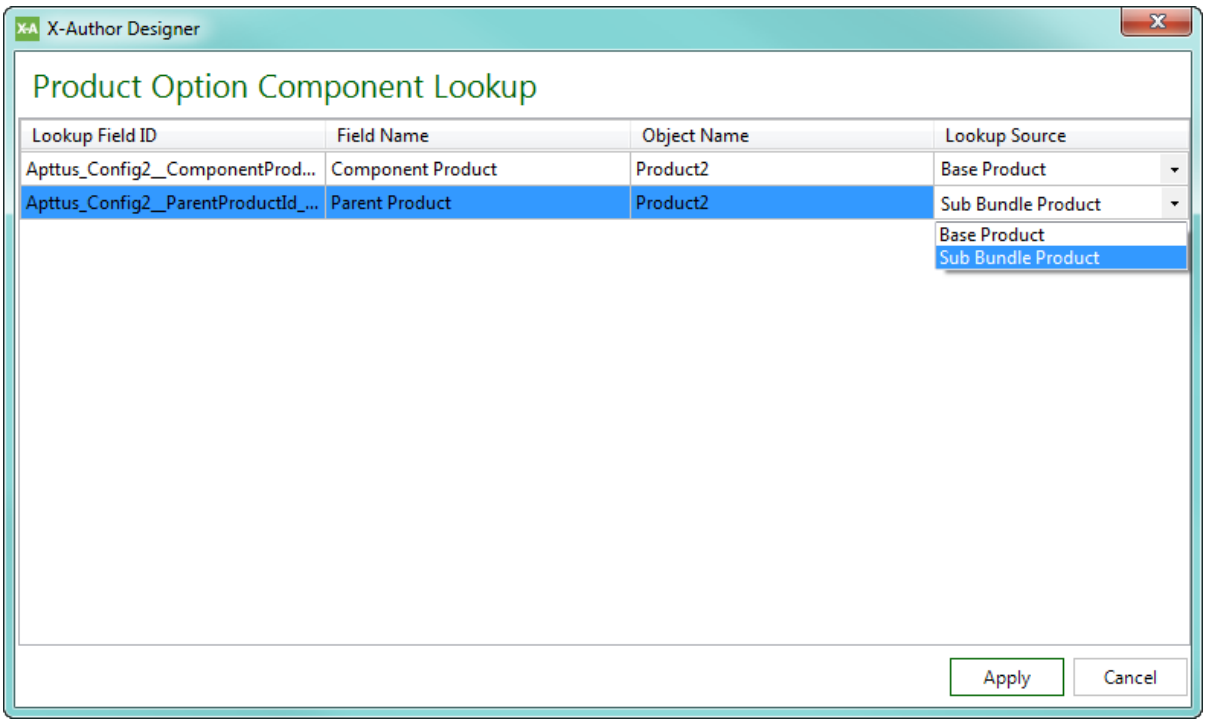

After you create or update the wizard, check the appropriate "Export" action flow step that corresponds to the data migration object action. Each Lookup Source you selected in the data migration lookup window is listed under "Action Input" for the step.

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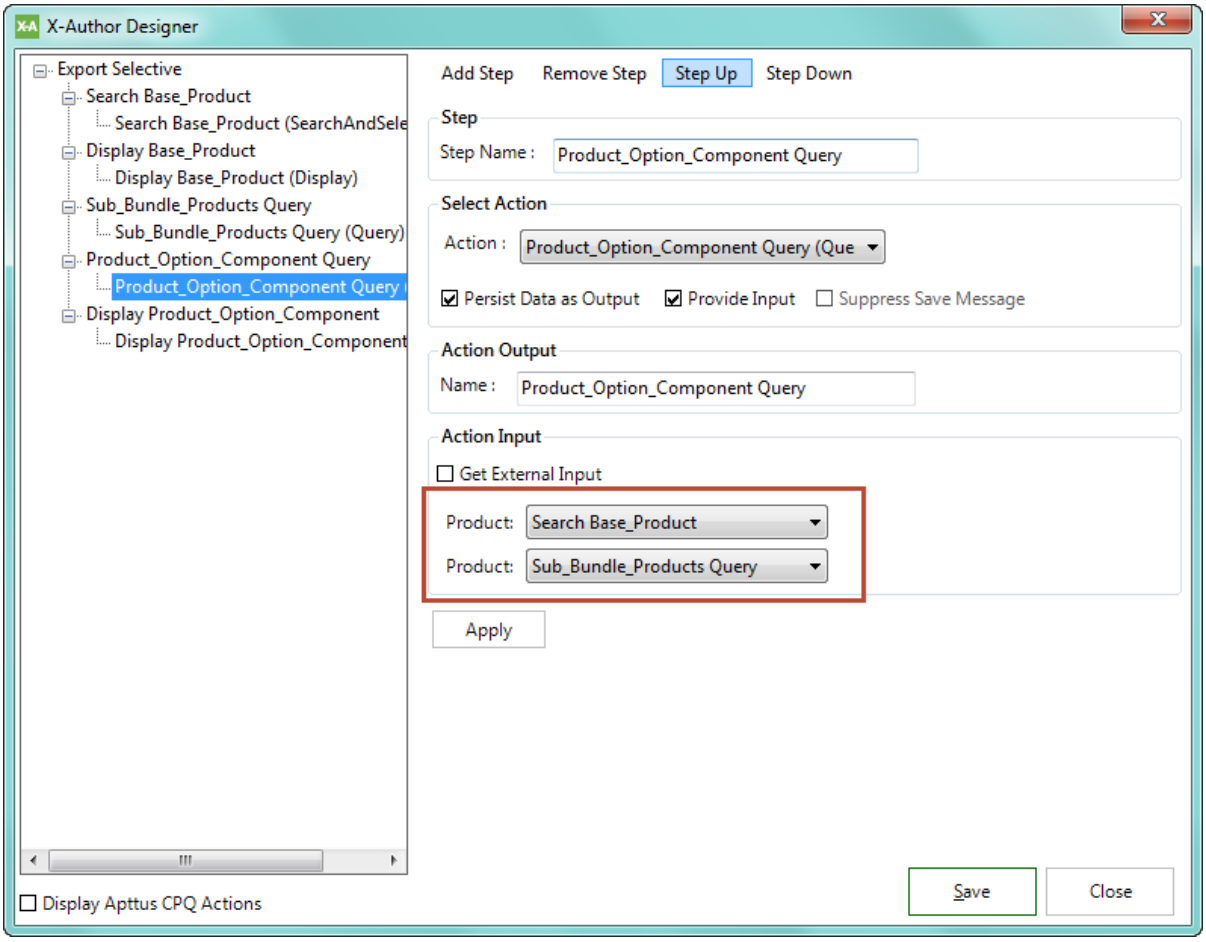

When the migration is executed at runtime, actions from each lookup source will retrieve a combination of records based on the complete data set.

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).

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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.

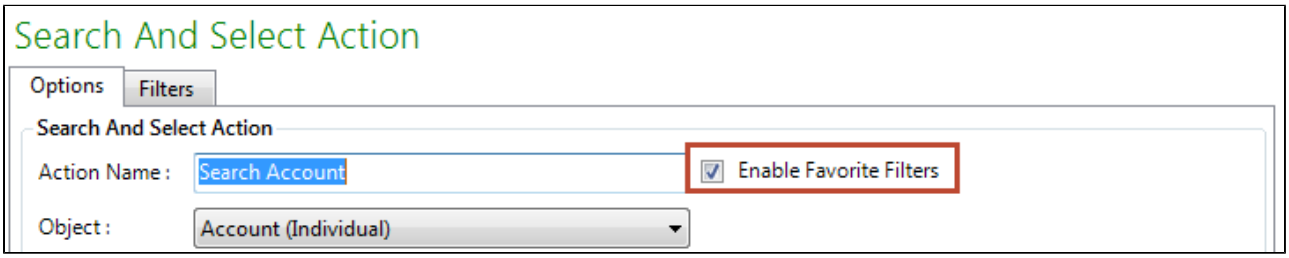
Favorite Filters

The Favorite Filter enhancement allows runtime users to created 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**.



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Using Favorite Filters

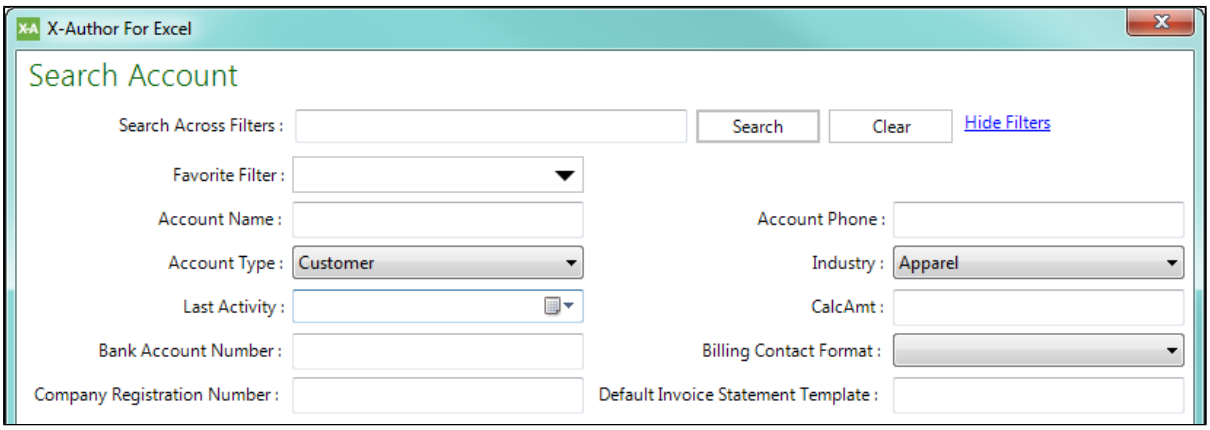
Runtime users can create and reuse Favorite Filters for any action in any app where the feature was enabled by the designer. The option to create and use Favorite Filters appears when the specified action executes as part of an action flow or when manually triggered. When a new Favorite Filter is created 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, reusabled 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.



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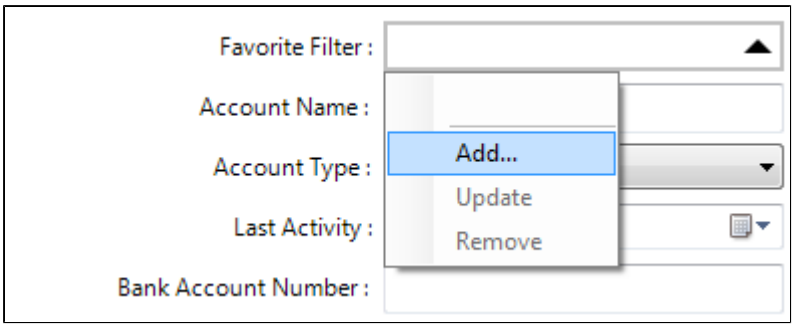
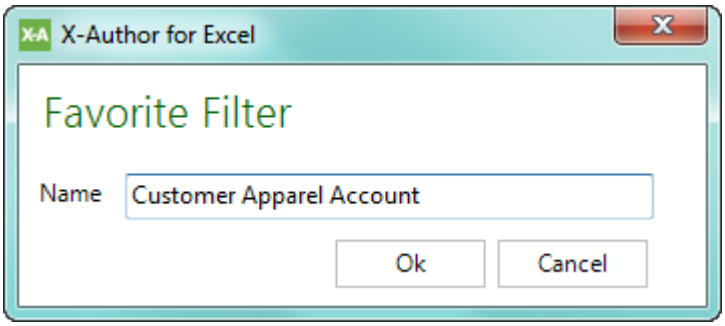
3. Click on the Favorite Filter drop-down and select **Add...**



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.

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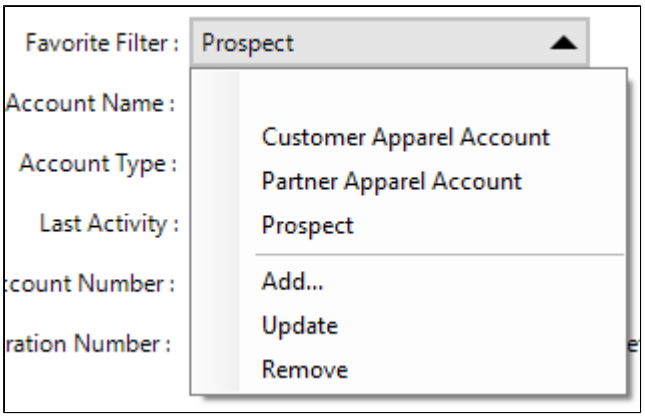

3. Execute the action.

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 Designer & Runtime guide.

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Resolved Issues

The following table represents resolved issues for the release dated: 25 May, 2017

Case Number	Description	Apttus Internal Case Number
208743	Type ahead functionality stopped working on the latest version of X-Author for Excel. This issue has been resolved.	AB-2761
	Favorite filter had an issue with `In` operator. When you had more than one value in user input, it clubbed the values. This issue has been resolved.	AB-2820

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Known Issues

The following table represents known issues:

Apttus Internal Case Number	Issue
X-Author Excel 5.1.0523	
AB-2870	In X-Author for Excel, the objects of previously opened app appear in newly created data migration app.

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