



APTTUS[®]

X-Author Migration Manager on Salesforce

Summer 2019 User Guide

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X-Author Migration Manager (XAMM) is a Windows-based tool that enables you to upgrade, migrate, and convert templates.

Use the Migration Manager to perform the following functions:

- Upgrade templates from a previous version of Contract Management to **Contract Management 7** and higher. Upgrading templates applies a UUID (Universal Unique Identifier) field to all existing template records in your org.
- Migrate templates to a different target org after you have upgraded your initial org, which becomes your source org for the templates. Prepare your target org before migrating templates. by updating all metadata, such as Term Exception records, from the source org, via a data loader or change sets, to the target org. You can migrate all of the templates from the source org to the target org, or you can choose to migrate only those templates that match certain criteria.
- Convert your existing pre-FX2 templates to FX2 format. During this process, the existing pre-FX2 templates are cloned with the same name, keeping the new FX2 templates in an inactive state in the same org. You can also specify filter criteria to identify only those template records that you want to convert.

 You and your Apttus representative should establish the best process to upgrade and migrate templates for your implementation.

What's New

The following table lists changes in the documentation to support each release.

Release	Topic	Description
Summer 2019	Migrating Templates with Versioning	New topic. New feature for this release.
	Migrating Templates	Modified topic. Older screenshots replaced with new screenshots.
	Migration Manager Functions	Topic removed.
	X-Author Migration Manager Installation	Modified topic. Renamed to Installing X-Author Migration Manager .
	Converting Templates	Modified topic. Legacy content updated.
	Installing X-Author Migration Manager	Modified topic. Older screenshots removed and a topic added on launching X-Author Migration Manager.
	Upgrading Templates	Modified topic. Older screenshots removed.

Installing X-Author Migration Manager

Prerequisites

- You must have administrator rights on your computer.
- You must close all open Microsoft applications prior to installation.

To download X-Author Migration Manager


Follow these steps to install the Migration Manager on your computer. Always install the latest version of Migration Manager from the Apttus Install Center.

1. From the Apttus Community Portal, go to **Resources > Install Center > Contract Management** and click **Download** for Migration Manager.
2. When the download dialog box is displayed, click **Save As** to save the file `ApttusMigrationManagerInstaller_nn.exe` to your machine.

To install X-Author Migration Manager

1. Run `ApttusMigrationManagerInstaller_nn.exe` to launch the installer.
2. Accept the terms in the license agreement and click **Next**.
3. Click **Install** to begin the installation process.
4. Following installation, select **Launch X-Author Migration Manager** to run the application and click **Finish**.

You are now ready to use X-Author Migration Manager.

 If you encounter the following exception during the installation of X-Author Migration Manager, follow the steps described as under to solve it.

"Unable to cast COM object of type 'Microsoft.Office.Interop.Word.ApplicationClass' to interface type 'Microsoft.Office.Interop.Word._Application'.

This operation failed because the QueryInterface call on the COM component for the interface with IID '{00020970-0000-0000-C000-000000000046}' failed due to the following error: Error loading type library/DLL. (Exception from HRESULT: 0x80029C4A (TYPE_E_CANTLOADLIBRARY))."

Solution: The above exception could be a registry issue due to a faulty Microsoft Office installation. Re-install Microsoft Office and then install X-Author Migration Manager.

To launch X-Author Migration Manager

If you do not see X-Author Migration Manager shortcut on your desktop or Start menu on your Windows system follow the steps given below to launch X-Author Migration Manager:

1. Go to **Start Menu > This PC > Your local drive**.
2. Go to this path: `Program Files (x86)\Apttus\X-Author Migration Manager`.

3. Double click the X-Author Migration Manager application icon.

Converting Templates

In X-Author Migration Manager, you can use an automated step-by-step wizard to convert templates from pre-FX2 format to FX2 format. FX2 format lets you create templates with desirable layout and design. To use X-Author Migration Manager to convert templates, you must create a new migration configuration.

During the conversion, X-Author Migration Manager creates an FX2 clone of the original pre-FX2 template, with the following properties:


- Same name as the pre-FX2 template
- **IsActive** checkbox not checked

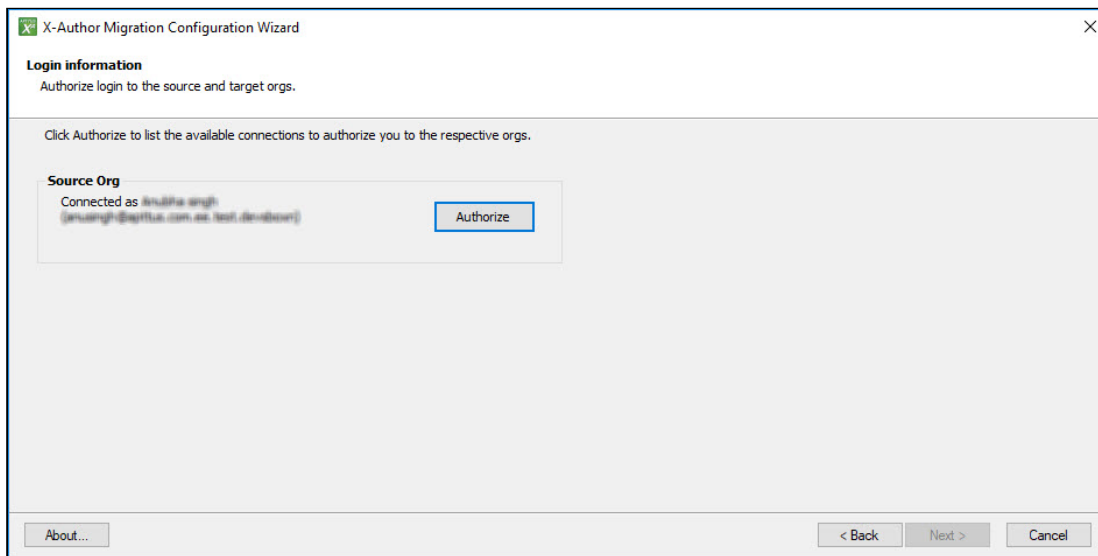
If your org already contains FX2 templates that match any templates chosen for conversion, X-Author Migration Manager automatically skips the template without creating a duplicate.

Prerequisites

- Contract Management 7.255 or higher must be installed in your org (to support FX2 format).
- If your org is still using templates created in 6.x, you must [upgrade](#) your templates first.
- Close all Microsoft Office products before running a migration.
- Your org must have existing templates created in Pre-FX2 format.

To convert Pre-FX2 templates to FX2 templates

1. Go to the Windows **Start** menu and select **Apttus > X-Author Migration Manager**.
2. Select **Create a new migration configuration** and proceed to *Step 2*.
- OR -
Select **Use an existing migration configuration**, click  to browse to an existing upgrade XML file and open it, and proceed to *Step 5*.
3. Select **Create FX2 templates from existing Pre-FX2 templates** and click **Next**.
4. Click **Authorize** to display the Manage Connections window.
The listed available connections are those you have already configured on your machine, via either X-Author Migration Manager or X-Author Contracts. If not, enter your URL and authorize your org credentials.




5. Click **Connect** to connect to the source org.
- OR -
Enter a new connection name and Login URL and click **Authorize**.
If the above action is successful, the Manage Connections window closes and returns you to the X-Auth Migration Configuration Wizard. If you do not connect successfully, verify that you have entered the correct username and URL.
6. Specify the filter criteria to build expressions to define which templates you want to convert. Use **Add Row** to add more expressions. Click **Add Filter Logic** to create an advanced expression using row numbers as reference (e.g., "1 OR 2 (AND 3)") Use **Show Filter Expression** to view the formula created from your logic. Click **Next** to move to the next step in the Configuration Wizard.
7. View the list of templates that match your defined filter criteria. Click **Back** to make changes to your filters or **Next** to confirm the templates to be converted.
8. Click **Save** to save the current configuration as a migration configuration for reuse later. This does not save the org details or login credentials. Optionally, select **Review log file once migration is completed** if you want to review the process for each template, along with its execution time.
Click **Finish** to start the FX2 template creation process.
9. Click **OK** to confirm a successful conversion and review the log file for details. In the event of an unsuccessful conversion, you can review the log file to troubleshoot any errors.

Migration Manager creates a copy of all converted templates in the connected org in FX2 format. It is recommended to test all converted templates before authorizing them for active use.

Migrating Templates

Migrating templates enables you to move templates, and their referenced clauses, from one Salesforce org to another.

 Close all Microsoft Office products before running a migration.

Migrating Templates and Universal Unique IDs

Universal unique identifier (UUID) fields of the agreement templates, clause templates, and term exceptions in Contract Management support the functionality available with the X-Author Migration Manager.

The UUIDs help provide the ability to update and migrate templates from one org to another. These IDs are unique and once an ID is assigned to a template or term exception object record, it cannot be changed.


To use the templates with the UUID field, you must have X-Author Contracts 7.0 or higher.

Prerequisites

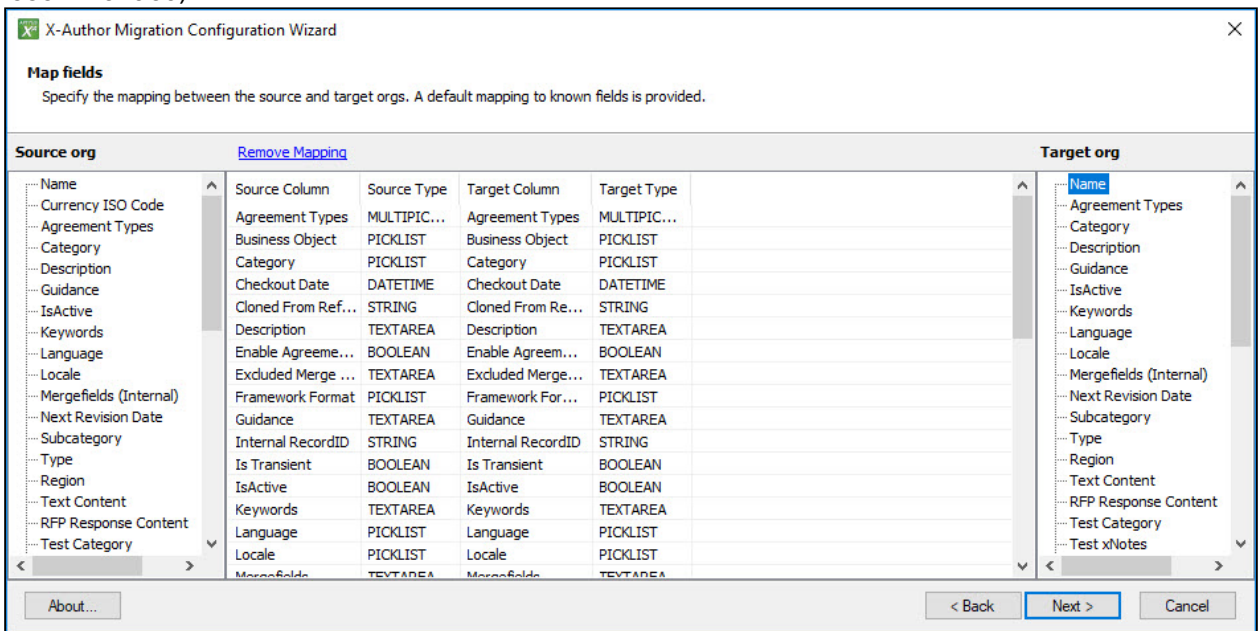
You must have [upgraded](#) your source org templates.

Also if there are any schema changes or master data changes that have been made in a source org, they should be rolled out to the target org before migrating. For example, Term Exceptions are lookups from Template object and master records must exist in the target org before migration.

To migrate templates between orgs

1. Go to the Windows **Start** menu and select **Apttus > X-Author Migration Manager**.
2. Select **Create a new migration configuration** and proceed to *Step 3*.
- OR -
Select **Use an existing migration configuration**, click  to browse to and open an existing upgrade XML file from a previous migration, and proceed to *Step 6*.
3. Click **Next**, select **Migrate Templates from one Org to another** and click **Next**.
4. In the **Source Org** panel, click **Authorize** to display the Manage Connections window. The listed available connections are those you have already configured on your machine, via either X-Author Migration Manager or X-Author Contracts
5. Click **Connect** to choose the source org.
- OR -
Enter a new connection name and Login URL and click **Authorize**.
If the above action is successful, the Manage Connections window closes and returns you to the X-Author Migration Configuration Wizard. If you do not connect successfully, verify that you have entered the correct username and URL. If the orgs do not have the required version of Contract Management installed, a message is displayed indicating that you must update your org before the migration process can be run.
6. In the **Target Org** panel, click **Authorize** to display the Manage Connection Window.

7. Click **Connect** to choose the target org.
- OR -
Enter a new connection name and Login URL and click **Authorize**.
8. (Optional) Select **Show mapping of fields page**, and click **Next** to display the Mapping Fields page. If you choose not to show mappings, the default mapping of known fields will be used. The Map field page displays the header-level Template fields for the source and the target orgs. It includes the name of the field and what type it is. Use the **Remove Mapping** link to remove default mappings (not recommended).



9. Click **Next** to display the Template Filter page.
10. Using the header-level Template fields for criteria, create expressions to filter which templates are included as part of the migration process.

i You must include at least one filter and can have up to a maximum of six filter rows. The relationship between the rows can only be AND. This means additional rows will make the results more restrictive. The operators (not equal to, includes, contains, etc...) are contextually based on the field you select.


11. Click **Next** to display the Filter Criteria result page and review the templates and clause templates to be included in the migration. For those templates that reference them, click [+] to display the child and grandchild clauses that are automatically included in the migration. Select a template to display its properties. Click **Back** to make any necessary changes to your filter criteria.
12. Click **Next** to display the Migration Summary page.
13. Click **Save** to save this migration configuration for future use. This does not save the org details or login credentials.
14. Click **Finish** to begin the template migration. The migration runs and displays the progress for each template that is updated.

15. Log in to the target org to confirm all templates were migrated as expected. Consult the log file for details or to troubleshoot templates that were not successfully migrated.

Migrating Templates with Versioning

You can migrate versioned templates from the source org to the destination org using X-Author Migration Manager. The templates migrated from the source org to the destination org are labeled with a template version. Read the following guidelines before migrating templates:

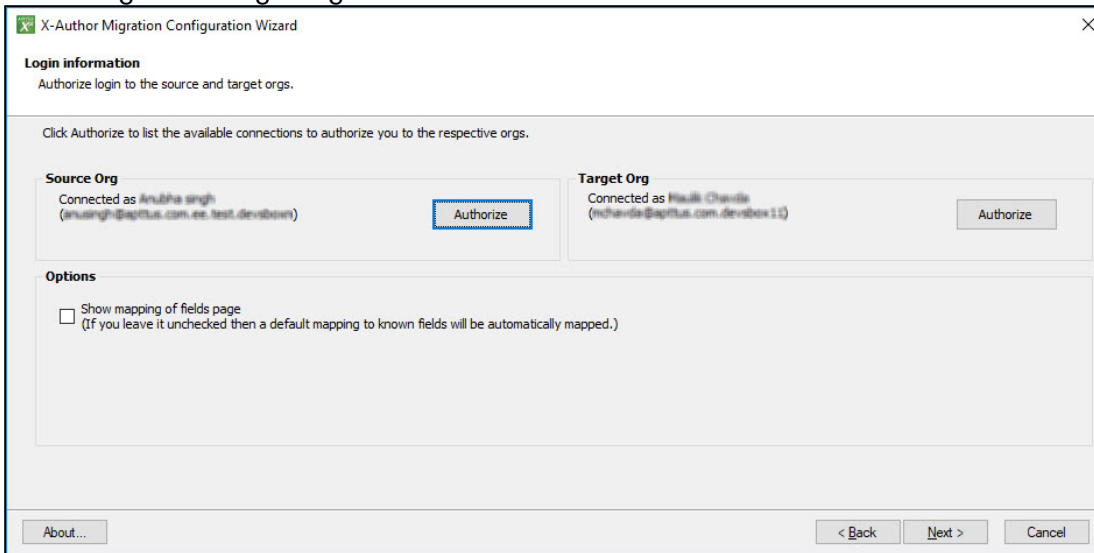
- Versioning must be either enabled or disabled in both the orgs. You cannot migrate templates where only one of the org has versioning enabled.
- To migrate templates with custom fields, you must first create similar custom fields in the target org.
- When you migrate templates, the active version of the template is migrated to the target org.
- When you migrate a template for the first time, the template created in the Target org is versioned v1.0. and marked active.
- When you migrate a template which already exists in the Target org, the new version of the migrated template is the increment of the last major version and is marked active. For example, if the last version was 2.0. the new version would be 3.0.
- When you migrate a template version, clauses and dynamic segments are migrated along with it and clause versions and dynamic segment versions are created with the template version.

 Migrating template with versions feature can only be used with X-Author Contracts version Summer 2019 and onwards.

To migrate versioned templates

1. Launch X-Author Migration Manager.
2. Select **Create a new migration configuration...** and click **Next**.
3. From the Migration Options page, select **Migrate Templates from one Org to another** and click **Next**.
4. Click **Authorize** to connect the source org and the target org and click **Next**.

5. (Optional) Select the **Show mapping of fields page** checkbox to view mapping of the fields from the source org to the target org.



6. From the Filter Criteria page, use the Expression Builder to form the filter expressions and filter the templates to migrate.
 - a. Choose the business object context of the template to define qualified expression fields.
 - b. After you choose the business object, all of the fields in that business object automatically expand, showing you a list of the available fields to choose from. Choose the necessary fields.
 - c. Each expression condition requires the identification of the field control to which the condition will apply, the operator to be used in the condition, and the value of the field where the condition shall be True.
 - d. Click **Add Row** to add more expression conditions, where 2 or more conditions are joined in the overall expression by the Boolean operator AND.
 - e. Click **Show Filter Expression** to view the filter expression created.
 - f. Click **Next**.
7. The Filter Criteria Result page displays the filtered template list. Click **Next** to continue the migration process.
8. To save your current configuration, click **Save** and then click **Finish** to begin the migration.

The migration process starts and you can see the log and the progress bar.

 For more details on how to migrate non-versioned templates, refer to [Migrating Templates](#).

Upgrading Templates

When you upgrade to Contract Management from a version earlier to Contract Management 7.0, you must upgrade all of your templates. The following items are updated by the Migration Manager to support the Universal Unique Identifier (UUID) field:

- All template records, including clauses.
- All clause references are updated to point to the UUID instead of the Salesforce ID
- Document properties
- Term Exceptions

i Although Term Exceptions are also updated with UUIDs, they cannot be automatically migrated. You have to copy these term exception records from the source to other orgs (if multi-org ecosystem is involved) by data loader or other means after the upgrade.

Prerequisites

- Close all Microsoft Office products before running an upgrade.

To upgrade templates

1. Go to the Windows **Start** menu and select **Apttus > X-Author Migration Manager**.
2. Select **Create a new migration configuration**.

i **Use an existing migration configuration** is typically used for migrations and not upgrades.

3. Click **Next**, select **Upgrade Templates to support Unique Identifier** and click **Next**.
4. Click **Authorize** to display the Manage Connections window. The listed available connections are those you have already configured on your machine, via either X-Author Migration Manager or X-Author Contracts.
5. Click **Connect** for the user with the appropriate permissions to use the Migration Manager.

- OR -

Enter a new user and Login URL and click **Authorize**.

If the above action is successful, the Manage Connections window closes and returns you to the X-Author Migration Configuration Wizard. If you do not connect successfully, verify that you have entered the correct username and URL.

6. Click **Next** to display the Upgrade Summary page and click **Finish**.

The upgrade runs and displays the progress for each template that is updated. Each upgrade creates a log file which you can review to see the specifics for the upgrade.

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