



X-Author Contracts on Salesforce Spring 2020 Patch 7 Release

Notes

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About Release Notes

Apttus Release Notes contain the following information about X-Author Contracts Spring 2020 Patch 7 Release on Salesforce.

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release

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Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>Version Name / Version Number</i>
X-Author Contracts (New)	11.5.819.2001 11.5.819
Apttus Contract Management (New)	11.0.0519.11 11.519.11

i Before installing or upgrading Apttus managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Apttus Packages Dependency Matrix](#).

System Requirements and Supported Platforms



Apttus X-Author Contracts is a Microsoft Word Add-In that is accessed via Microsoft Word application on your Windows machine. For the X-Author Contracts Add-In to work, the Apttus Contract Management package must be installed in your Salesforce Org. This is required so that the various dialog boxes available in X-Author Contracts can display the correct fields. Once this is done by your system administrator, you will be able to install the X-Author Contracts Add-In and begin using it.



- You cannot use a Mac OS X operating system with X-Author Contracts; however, it can be used with a Mac running a Windows Virtual Machine in a Citrix environment.
- Microsoft's Office 365 Online or Cloud applications do not support plugins; therefore, the Apttus X-Author Contracts can only be used in a Windows desktop environment.
- New features and technologies are continuously deployed in new releases by Apttus X-Author Contracts, and they are supported by Apttus where the associated Microsoft OS and/or Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its support for any OS and/or Office version, subsequent new Apttus releases will no longer be developed, tested, or committed to support the application on any Microsoft OS and/or Office version which is no longer supported by Microsoft.

The following table lists the minimum requirements for installing and using X-Author Contracts.

System Requirement	Minimum Supported Version
Windows OS	Windows 10 Windows 8 & 8.1 Windows 7 *X-Author supports both the 32-bit & 64-bit versions of the above Operating Systems.

System Requirement	Minimum Supported Version
Microsoft Office	<p>Desktop version of Office 365</p> <p>Microsoft Word 2016 or Office 2016</p> <p>Microsoft Word 2013 or Office 2013</p> <p>Microsoft Word 2010 or Office 2010</p> <p>*Where applicable, X-Author supports 32-bit and 64-bit versions of the above applications.</p> <p>**The above versions assume you are using Professional or Enterprise versions of Office. Home & Student or other limited versions of Office are not supported and may or may not prove to be compatible with X-Author Contracts.</p> <div data-bbox="384 792 1426 891" style="border: 1px solid #f9e79f; padding: 5px; margin: 10px 0;"> <p> Apttus no longer supports Microsoft Word 2007 with X-Author Contracts.</p> </div> <div data-bbox="384 898 1426 1088" style="border: 1px solid #d9e1f2; padding: 5px; margin: 10px 0;"> <p> • Apttus recommends using the latest Microsoft Office Suite for best performance.</p> <p>• For some Playbook features to work, you must install Microsoft Word OS Build 17134.228 update. This update is a part of Windows 1803 build.</p> </div>
Microsoft .NET	Microsoft .NET Framework 4.5 or higher
Microsoft VSTO	Microsoft Visual Studio 2010 Tools for Office Runtime
Microsoft Office PIA	Microsoft Office 2010 Primary Interop Assemblies
Salesforce	Unlimited, Enterprise, and Developer Product Editions

Upgrade Notes

If you are upgrading X-Author Contracts from Winter 2019 (10.0.1125.1903) to any latest version, you need to uninstall X-Author Contracts and install the latest version. For more information on installation, see [Installing X-Author Contracts](#) in the X-Author Contracts User Guide.

New Features

There are no new features in this release. Keep checking the [Apttus Documentation Portal](#) for new updates.

Enhancements

There are no enhancements in this release.

Data Model Changes

This release does not have any data model changes for X-Author Contracts.

Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Apttus Internal ID	Description
00104653	XA-4018	<p>A user encountered an error during login to X-Author Contracts when the user had a single sign-on login with Azure Active Directory as an identity provider and Conditional Access Policy was enabled. The user observed this behavior when using the EO browser.</p> <p>Resolution: If you are unable to login to X-Author Contracts using single sign-on along with the below settings:</p> <ul style="list-style-type: none"> • Azure Active Directory as an identity provider • EO browser • Conditional Access Policy is enabled <p>you must use Internet Explorer browser and add <code><UseMicrosoftWebBrowserControlForLogin>True</UseMicrosoftWebBrowserControlForLogin></code> configuration in X-Author Contracts.config file.</p>
NA	XA-4007	<p>PDF security did not apply to documents that were checked-in as Final-to be signed with Create PDF attachment option selected. A user with permissions other than System Administrator observed this behavior.</p> <p>Resolution: If you are using the Apttus Contract Management package version prior to 11.546 version, the system administrator must assign Apttus.Comply System Properties to your user profile to enable PDF security feature for your profile. If you are using the Apttus Contract Management package version 11.546 or later version, the PDF security feature is enabled for all user profiles by default.</p>
00103079	XA-4005	<p>When a user inserted clauses from Playbook into a template that had paragraph number formatting, the number formatting for clauses was not retained during check-in of the template.</p>
00104256	XA-3999	<p>When a user modified a clause in an agreement document and checked-in the document with Final-to be signed, Reconcile Document and Create PDF Attachment options selected, the final clause entry did not contain the modified text in Agreement Clauses related list. The user observed this behavior when the clause was created using the mark as clause functionality in the template.</p>

Case Number	Apttus Internal ID	Description
00101935	XA-3953	When a user added Conditional Segment or merge fields in the header and footer section of a template by applying section break, the user encountered an Invalid AptObject exception while generating an agreement document using that template.
NA	XA-3900	<p>When a user generated an agreement document using a template that had template level locale formatting, but no clause level locale formatting, the template level locale formatting did not apply to the Number and Currency fields in the clause.</p> <p>Resolution: When the locale formatting is not defined for a clause, the clause inherits the template level locale formatting in the generated agreement document.</p>

Known Issues

The following table provides the cumulative list of known issues up to this release.

Apttus Internal ID	Issue
XA-3859	When you review import result after Intelligent Import, X-Author Contracts incorrectly marks the text around fields.
XA-3236	When you check in an agreement document without changing the value of any smart field, the message prompt does not appear.
XA-2856	IDE highlighting on PDF is done by IDE itself, and X-Author Contracts highlights based on approximation by various algorithm process. As IDE uses OCR to extract field and clauses, such difference exists.
XA-2793	When you delete an Updatable or ReadOnly field and then click Preview Reconcile , you can see the deleted field on the reconciliation page.
XA-2743	When you delete a smart field that occurs multiple times in the document, the smart fields are not correctly re-indexed in the Control Panel.
XAO-87	If you have enabled the Salesforce Files system in your Contract Management Org and you launch X-Author Outlook, connect to your org and click Send for Review, you see an error.
XA-2580	For a template with template versioning enabled, the search result in Playbook shows clauses that do not match the agreement type of the template.
XA-2574	For versioning enabled template the Check-out feature gives different versioning output for the cloned template. When you check out a cloned template by going to Check-out > Currently opened document the template takes the version of the parent template, but if you check out a template using the Check-out search, X-Author Contracts creates the template from version 1.000.
XA-2570	For template versioning enabled orgs when you insert the main and inline clause in a template and check it in after performing Refresh Clause, the Needs Publishing checkbox is not cleared for the header clause record.
XA-2568	For versioning enabled org when you change the clause content and check it in, X-Author does not display a message about the affected dependent clauses or templates.
XA-2565	For versioning enabled migrated template, Refresh document action doesn't update the new nested clause content in a template document. This occurs when you change a nested clause contained in a template document and check in the template document without first publishing the clause.
XA-2564	When you change a clause in a migrated template document with versioning enabled and check in the template, X-Author Contracts does not display any acknowledgment message.

Apttus Internal ID	Issue
XA-2561	X-Author does not reflect changes in migrated templates, when templates are migrated using X-Author Migration Manager from the source org to the destination org and the destination org already contains those template records.
XA-2560	The template versioning does not increment the template document version value when checking in an existing template after making changes to it. This occurs when a template is migrated from the source org to the destination org which already contains that template record.
XA-2559	When you open a recently migrated template document in X-Author Contracts and click Check Out > Currently opened document , you receive an exception error and are logged out of X-Author Contracts. This occurs when you migrate a template from a template versioning enabled org to a new org, download the attachment from the template record and open it in X-Author Contracts.
XA-2509	When you compare two agreement documents containing date fields - both in text and in table cells - and then accept or reject changes in the document, the date picker in some of the date fields is lost.
XA-2307	When you perform Update from Salesforce action on a generated agreement document that does not have values for the first column of the repeating table, X-Author Contracts shows a blank screen.
XA-2260	After changing the content of a marked clause and viewing it in the control panel by clicking Show Changes , X-Author Contracts removes one character from the clause in the changes screen.

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