



**APTTUS<sup>®</sup>**

## **X-Author Contracts on Salesforce Summer 2018 Release Notes**

01/23/2019


# Table of Contents

|   |    |
|---|----|
| <b>About Release Notes</b> .....                                | 3  |
| <b>Packages</b> .....   | 4  |
| <b>System Requirements and Supported Platforms</b> .....        | 5  |
| <b>Feature Summary</b> .....                                    | 7  |
| Deleting Smart Elements Using Delete Key or Backspace Key ..... | 7  |
| Syncing Clause Edits in Smart Clauses .....                     | 7  |
| <b>Resolved Issues</b> .....                                    | 8  |
| <b>Known Issues</b> .....                                       | 9  |
| <b>Apttus Copyright Disclaimer</b> .....                        | 12 |

## About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#): This table consists of packages that are required to upgrade to this release.
- [System Requirements and Supported Platforms](#): Information pertaining to the requirements and recommendations you must consider before you proceed with the installation of X-Author Contracts.
- [Feature Summary](#): Provides 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](#)
- [Known Issues](#)

 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.

## 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 pre-requisites per feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

| Product                                 | Latest Certified Version |
|---|--------------------------|
| X-Author Contracts <b>(New)</b>         | 9.1.0906   9.906         |
| X-Author Outlook <b>(New)</b>           | 2.1.0803   2.803         |
| Apttus Contract Management <b>(New)</b> | 9.2.0413   9.413         |

## 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.

Your computer must meet the minimum requirements listed below to use X-Author Contracts. Apart from Microsoft Word, the other components listed will be automatically installed during the X-Author Contracts Add-In installation process if they are missing.



- 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.

| Supported Component | Supported Version   |
|---------------------|---|
| Windows OS          | <p><i>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 own 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.</i></p> <p>Windows 10<br/>Windows 8 &amp; 8.1<br/>Windows 7</p> <p>*X-Author supports both the 32-bit &amp; 64-bit versions of the above Operating Systems.</p> |
| Microsoft Office    | <p>Microsoft Word 2016 or Office 2016<br/>Microsoft Word 2013 or Office 2013<br/>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 &amp; 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 style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  Apttus no longer supports Microsoft Word 2007 with X-Author Contracts.         </div>   |
| Microsoft .NET      | Microsoft .NET Framework 4.5 or higher  |

| <b>Supported Component</b> | <b>Supported Version</b>                              |
|----------------------------|---|
| 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 |

## Feature Summary

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

- [Deleting Smart Elements Using Delete Key or Backspace Key](#)
- [Syncing Clause Edits in Smart Clauses](#)

### Deleting Smart Elements Using Delete Key or Backspace Key

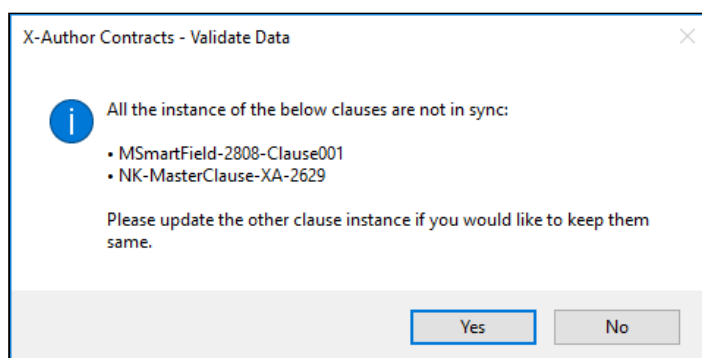
You can now use the Backspace or Delete key to delete clauses, fields, nested clauses, smart clauses and smart fields from an agreement document. Clauses or fields deleted from the document are recorded in the reconciliation screen as deleted. This feature improves the usability experience of X-Author Contracts. To delete the smart elements you must configure the custom setting, **UnlockSmartElements**, in Contract Management Comply System Properties.

#### Get Started

For more information on how to delete smart elements using Delete or Backspace key, refer to [Deleting Smart Elements](#) in *X-Author Contracts on Salesforce Summer 2018 User Guide*.

### Syncing Clause Edits in Smart Clauses

If you have multiple occurrences of a smart clause in your document, you may make changes to one instance and forget to make similar changes in the other clauses. X-Author Contracts can now alert you if the clause content of your smart clause is not in sync across all its occurrences within a document. When you make changes to one instance of a clause and leave the other clause instances unchanged and then check-in your document, you will see a validation message reminding you that your clause content is not updated for all the instances of that clause. You thus have the flexibility to either update all the clause instances with similar edits or continue with check-in without changing the clause.



#### Get Started

For more information on syncing clause edits, refer to [Reconciling Smart Clauses in an Agreement in X-Author Contracts on Salesforce Summer 2018 User Guide](#).

## Resolved Issues

The following table lists the resolved issues for this release.

| Case Number      | Description   | Apttus Internal ID |
|------------------|---|--------------------|
| CAS-05166-M8N7H8 | When you logged in to X-Author Contracts and clicked Checkout under X-Author Templates tab, the checkout screen did not load and you were unable to checkout a template. This issue is now resolved.                            | XA-2726            |
| CAS-05167-G4S2Y7 | When you cloned a template from an existing proposal, checked it out and opened the Control Panel, the fields in Control Panel were corrupted. This issue is now resolved.  | XA-2721            |
| CAS-05052-K9X1Z3 | After creating an agreement, when you generated it for the first time selecting the output format as PDF– the agreement document did not show up in the checkout screen of X-Author Contracts. This issue is now resolved.      | XA-2719            |
| CAS-04479-D8M8K8 | When you created a new smart field, you could simultaneously set the value of <b>Mark as Smart</b> and <b>Mark as Updatable</b> as <i>True</i> . This issue is now resolved. You can either mark a field as smart or updatable. | XA-2714            |
| N/A              | When you inserted a clause containing a nested clause in your agreement document, the clause became locked and could not be edited. This issue is now resolved.   | XA-2688            |
| 00217471         | When you inserted a clause in an agreement and then checked it in as final, the agreement clauses related list showed a duplicate clause entry. This issue is now resolved.   | XA-2578            |
| 00216364         | When you used X-Author for Outlook add-in to send a document for review, another outlook add-in OpenText Email Management crashed. This issue is now resolved.  | XAO-85             |



## Known Issues

The following table represents the known issues:

| Apttus Internal ID | Issue  |
|--------------------|--|
| XA-2793            | When you delete an Updatable or ReadOnly field and then click <b>Preview Reconcile</b> , you can see the deleted field on the reconciliation page.   |
| XA-2782            | <b>Update From Salesforce</b> does not work for an agreement document that has text area fields with multiple lines.   |
| XA-2769            | When you launch Microsoft Word and click <b>Connect</b> in X-Author Contracts, you see a script error. You can, however, click <b>Yes</b> and continue with log in.  |
| 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-2628            | If you have enabled the new Salesforce Files system in your Contract Management org, the <b>Update Current Version</b> option will not be available from X-Author Contracts.   |
| XA-2580            | For a template with template versioning enabled, the search result in Playbook shows clauses which do not match the agreement type of the template.  |
| XA-2574            | For a 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 <b>Check-out &gt; Currently opened document</b> 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 <b>Needs Publishing</b> checkbox is not cleared for the header clause record.   |
| XA-2568            | For a 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, <b>Refresh</b> 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.  |
| 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.  |

| Apttus Internal ID | Issue  |
|--------------------|--|
| 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 <b>Check Out &gt; Currently opened document</b> , 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 are lost.  |
| XA-2508            | When you accept all changes after comparing two agreement documents, some of the smart date fields lose their smartness property. This issue occurs when you have two agreement documents with smart date fields inserted in Microsoft Word table cells. After comparing the two documents when you navigate to Microsoft Word <b>Review</b> tab and click <b>Accept All Changes</b> , some of the date fields lose their smartness property. This is a known limitation of the product. |
| XA-2506            | <p>When you merge two versions of a document containing smart Date fields, after comparing them and then try to Accept or Reject the changes in the document, you receive an error. This is due to a known limitation of Microsoft Word.</p> <p>As a workaround to this problem, Apttus recommends that you should avoid using Merge documents feature when your documents contain Smart Date fields. You can instead choose the X-Author Contracts Compare feature.</p>                 |
| XA-2463            | In the Mark Clause menu Search Box, if you use special character-single quote (') in the search string, X-Author Contracts doesn't return clause or clause list in the search result.  |
| XA-2417            | When you check in a template with a clause containing the last element as a table object/smart field in a clause, the template crashes. To avoid this issue, add a whitespace just after the table and before the new line.  |
| XA-2327            | When you perform reconciliation on checking in an agreement document containing a clause with multiple instances of a currency type smart field with different currency formats, X-Author Contracts updates all the instances of the smart currency field in the clause to a single currency format.   |
| XA-2316            | Performing Refresh/ Publish action in a template shifts the header/ footer clause content to the main clause content.  |
| XA-2307            | When you perform Update from Salesforce action on a generated agreement document which does not have values for the first column of the repeating table, X-Author Contracts shows a blank screen.  |

| Apttus Internal ID | Issue   |
|--------------------|---|
| XA-2260            | After changing the content of a marked clause and viewing it in the control panel by clicking <b>Show Changes</b> , X-Author Contracts removes one character from the clause in the changes screen.   |
| XA-1932            | When you attempt to check in a merged document where the original document was non-version-aware, X-Author Contracts displays an error stating that the document is already checked out. The currently recommended workaround is to append the document name at check-in to prevent this error. |
| XA-1931            | After checking in a combined document, X-Author ribbon menu items get disabled for the original document. Checking out the original document enables the menu items.  |

## Apttus Copyright Disclaimer

Copyright © 2019 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://community.apttus.com>.

DOC ID: XACSFSUM18RN20180907