

APTTUS[®]

X-Author Contracts on Salesforce Winter 2018 Release Notes

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About Release Notes

Apttus Release Notes contain the following information about X-Author Contracts Winter 2018 Release on Salesforce.

For more information on new features, enhancements, and document improvements refer to

- [What's new](#) in *X-Author Contracts on Salesforce Winter 2018 User Guide*

- [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

 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 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)	9.1.1127 9.1127
X-Author Outlook (New)	2.1.1120 2.1120
Apttus Contract Management (New)	9.3.432 9.432



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 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.

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="386 705 1456 783" style="border: 1px solid #f96; padding: 5px; margin: 10px 0;"> <p> Apttus no longer supports Microsoft Word 2007 with X-Author Contracts.</p> </div> <div data-bbox="386 793 1456 905" style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p> Apttus recommends usage of the latest Microsoft Office Suite for the best performance.</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

For more information on the prerequisites and post-upgrade tasks, see [Installing X-Author Contracts](#) in X-Author Contracts User Guide.

New Features

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

- [Show/Hide Contracts and Templates Tab Based on Action Permission](#)
- [Insert Clause as Text](#)
- [Intelligent Import](#)

Show/Hide Contracts and Templates Tab Based on Action Permission

You can selectively show or hide X-Author Contracts or Templates tab in X-Author Contracts application based on user roles. You can configure action permissions in Contract Management and associate it with the user roles to limit access to the tabs, thus ensuring that users can only access the actions or features that are permitted for their respective roles. The two new action permissions are:

- XA_Contracts associated with the agreement object (for X-Author Contracts tab), and
- XA_Templates associated with the template object (for X-Author Templates tab)

You (system administrator) can set the permissions as:

User	XA_Contracts Action Permission	XA_Templates Action Permission	Tabs Accessible in X-Author Contracts
User 1	Enabled	Enabled	Both, X-Author Contracts and X-Author Templates tab
User 2	Enabled	Disabled	Only X-Author Contracts tab
User 3	Disabled	Enabled	Only X-Author Templates tab
User 4	Disabled	Disabled	None

You must assign at least one action permission to the user for either of the tabs, otherwise, the user will be automatically logged out and a message will be displayed that the user has insufficient privileges.

Get Started

For details on how to assign action permission, refer to [Managing User Profiles](#) in *Contract Management on Salesforce Winter 2018 Administrator Guide*.

Insert Clause as Text

You can now insert a clause as plain text in a generated document. With this feature, you can track the insertion of a clause as a text.

Get Started

For details on how to insert a clause as text, refer to [Inserting Clause as Text](#) in *X-Author Contracts on Salesforce Winter 2018 User Guide*.

Intelligent Import

You can use the Intelligent Import feature to start a contract with a third-party paper instead of your own paper. If you are already a Contract Management (CLM) user, you can use the Intelligent Import feature to automatically scan the third party paper.

You can then review the import result when you send a third party document for intelligent import. After the intelligent data extraction server finishes the import, you can click Review Import Result to view and edit the value of the automatically mapped fields and clauses recognized by the intelligent import server. The Review Import Result pane will show two tabs respectively for automatically mapped fields and clauses. You can drag and drop other clauses from the document to add clauses in the document.

Get Started

For details about Intelligent Import, refer to [Intelligent Import](#) in *X-Author Contracts on Salesforce Winter 2018 User Guide*.

Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

- [Removal of Content Control from Nested Clause](#)

Removal of Content Control from Nested Clause

X-Author Contracts has been enhanced to remove nested clause content controls. Now, when you insert a clause into a generated agreement from the playbook that has a nested clause, the system treats the main clause as a master clause. The nesting is removed and insert the clause with only a single content control.

Get Started

For details on how to remove content control, refer to [Inserting Clauses with Merge and Smart Fields](#) in *X-Author Contracts on Salesforce Winter 2018 User Guide*.

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
CAS-07642-P5F9F4	XA-2820	Checking in a document after making changes, changed the path of the previously checked out document to a temp folder. This issue is now resolved.
N/A	XA-2817	Formatting of smart fields was lost in a generated document after opening and closing the Control Panel. This issue is now resolved.

Known Issues

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

Apttus Internal ID	Issue
NA	X-Author Contracts cannot process inconsistent and impure texts in IDE to convert Mark Clause. For example punctuations, different grammar, newline characters, space added or removed, spelling mistakes, and more.
XA-2869	Reconciliation of Date field is not working as designed. If you enter dates in dd/MM/yyyy format on the date field, upon reconciliation the day and month part gets interchanged.
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-2782	Update From Salesforce does not work for an agreement document that has text area fields with multiple lines.
XA-2769	When you launch Microsoft Word and click Connect in X-Author Contracts, you see a script error. You can, however, click Yes and continue with login.
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-2635	If you have file system enabled in Salesforce, you cannot update the current version during check-in from X-Author Contracts.
XA-2628	If you have enabled the new Salesforce Files system in your Contract Management org, the Update Current Version 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 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.

Apttus Internal ID	Issue
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.
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 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 Review tab and click Accept All Changes , 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.

Apttus Internal ID	Issue
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 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.
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.
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.

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