



# X-Author Contracts on Salesforce Winter 2019 Release Notes

Rev A

02/24/2020


# Table of Contents

About Release Notes.....	3
Packages .....	4
System Requirements and Supported Platforms.....	5
New Features.....	7
Default Filters for the Playbook.....	7
Controlling Check-in Options .....	7
Unprotecting Agreements.....	8
Tracking Changes to a Smart Field within a Smart Clause .....	8
Reconciling Only Comment Changes to a Clause .....	8
Support for User-entered Locales .....	9
Enhancements .....	10
Compare Agreements.....	10
Update Current Version with Check-in Options.....	10
Review Import Offline.....	10
Hiding X-Author Actions.....	11
Data Model Changes .....	12
Resolved Issues .....	13
Known Issues.....	14
Apttus Copyright Disclaimer .....	17

## About Release Notes

Apttus Release Notes contain the following information about X-Author Contracts Winter 2019 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

 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 <b>(New)</b>	10.0.1125.1903   10.0.1125.1903
Apttus Contract Management <b>(New)</b>	10.2.0491   10.491

## 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 &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 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

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

## New Features

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

- [Default Filters for the Playbook](#)
- [Controlling Check-in Options](#)
- [Unprotecting Agreements](#)
- [Tracking Changes to a Smart Field within a Smart Clause](#)
- [Reconciling Only Comment Changes to a Clause](#)
- [Support for User-entered Locales](#)

### Default Filters for the Playbook

You can now set the value of the default filters in Playbook using a new custom setting, **Override Playbook default filter**. The filter fields inherit their values from the template properties associated with the agreement document. In the scenarios where the complete clause list is lengthy, this feature is useful for showing only the relevant clauses in the clause list for an agreement.

#### Get Started

For details on how to set default filters in Playbook, refer to [Using the Playbook](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

### Controlling Check-in Options

You can control the X-Author Contracts agreement Check-in options based on the users or roles using custom permissions in Contract Management. Using this feature you can ensure that users do not perform incorrect Check-in actions on an agreement document while it is in negotiation. X-Author Contracts has following Check-in options:

- With Redlines,
- Without Redlines, and
- Final - to be signed

You can set the value of the custom permission corresponding to each of the above options in Contract Management and associate it with the user role to show or hide it. You can only assign one permission to each role and if you assign more than one permission to a role, the least restrictive option will be available to the users. Each permission inherits the permission from the previous permission in the decreasing manner as described below:

Action Permission and check-in options	Final - to be signed	Without Redlines	With Redlines
Check-in as Final	Available	Available	Available
Check-in without redlines	-	Available	Available
Check-in with redlines	-	-	Available

#### Get Started

For details on how controlled check-in options work, refer to [Checking In Agreements in FX2 Format](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

## Unprotecting Agreements

You can now let your end-users unprotect the protected documents from the X-Author Contracts tab using **Unprotect Document**. You can configure the access to the Unprotect Document button for a user by configuring the custom permission in Contract Management and assigning it to the user role. You can ensure that only trusted user roles can unprotect an agreement document for making changes and you, as an administrator, do not have to maintain several passwords, thus enhancing security. This feature also minimizes password sharing among the users.

### Get Started

For details on how to unprotect an agreement, refer to [Unprotecting Agreement Documents](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

## Tracking Changes to a Smart Field within a Smart Clause

You can now track the changes made to the value of a smart field contained within a smart clause. When you only update the smart field value in a clause and leave the clause unchanged, on check-in the Agreement Clause related list in Contract Management registers a new entry with Action as *FieldChangeOnly*. Using this feature you can minimize unnecessary approval requests that are triggered when only a field is modified and the clause remains unchanged.

### Get Started

For details on tracking clause changes, refer to the [Tracking Agreement Clause Activity](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

## Reconciling Only Comment Changes to a Clause

You can now reconcile and track changes made only to the comments on a clause. The changes made to the comments exclusively are tracked separately from the changes made to the clause text. When you add a new comment or update or delete an existing comment on a clause, and check-in your document, on the reconciliation screen you will see the changes made to the comments. Also, in Contract Management, the changes made to the comments are recorded under the Agreement Clauses related list with the Action *CommentsChangedOnly*.

This separation of tracking the changes on comments and clauses makes it easier to run the approval process. For example, you can create an approval process for an agreement in Contract Management which is triggered only if the clause text is changed during negotiation but not when comments are updated.

### Get Started

For details on tracking clause changes, refer to the [Tracking Agreement Clause Activity](#) topic in *X-Author Contracts on Salesforce Winter 2019 User Guide*.



## Support for User-entered Locales

You can now use user-defined locales in your agreement templates, clause templates, and template fields. This feature is available for both the versioned and the non-versioned templates. These user-defined locales are available for templates of all types, like, agreements, clauses, proposals, and billing invoices. You can define the locale and use it at the time of creating a template or while checking the template in. This feature ensures that the new locales are supported with the following X-Author Features:

- **Insert Field:** Field date, currency format, number fields, and precision value should be according to the locale setting of the field. Field-level locale formatting takes precedence over template-level locale formatting. This feature works with the following type of fields:
  - Inline Field
  - Smart Field
- **Mark Field:** Field date, currency format, number fields, and precision value should be according to the locale setting of the field. Field-level locale formatting takes precedence over template-level locale formatting.
- **Update from Salesforce:** Update from Salesforce supports all the locales including the out-of-the-box locale and the user-defined locales.
- **Insert Clause:** Clause date, currency format, number fields, and precision value should be according to the locale setting of the clause. If the clause has field-level locale formatting defined, that takes precedence over clause-level locale formatting. If the clause does not have a specific locale setting applied, the template locale formatting is applied. This feature works with the following type of clauses:
  - Inline Clause
  - Smart Clause
- **Swap Clause:** Clause date, currency format, number fields, and precision value should be according to the locale setting of the clause. If the clause has field-level locale formatting defined, that takes precedence over clause-level locale formatting. If the clause does not have a specific locale setting applied, the template locale formatting is applied.

### Get Started

For details about the custom locales refer to [Defining Template Locale](#) and [Changing Field Format by Locale](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

## Enhancements

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

- [Compare Agreements](#)
- [Update Current Version with Check-in Options](#)
- [Review Import Offline](#)
- [Hiding X-Author Actions](#)

### Compare Agreements

X-Author Contracts provides the compare feature to compare two agreements and view what has changed between the two documents. Microsoft Word displays a new, third document in which tracked changes in the baseline document are accepted and changes in the selected document are shown as tracked changes. Compare is enhanced to support smart fields. Now you can compare two agreement versions containing smart elements except repeat elements (Repeat Table and Repeat Section).

#### Get Started

For more details on enhanced compare functionality, refer to [Comparing Agreement Versions](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

### Update Current Version with Check-in Options

When you check-in an agreement and select **Update Current Version**, you can now also choose any of the three available Save options. Using the enhanced check-in feature, you can now update the current version of an agreement and simultaneously check-in a document with reconciliation to save the changes made to the smart fields in the document. Earlier, both the options were mutually exclusive and if you selected Update Current Version, the Save options were disabled.

#### Get Started

For more details on enhanced Update Current Version, refer to [Checking In Agreements in FX2 Format](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

### Review Import Offline

Winter 2019 release has introduced the following enhancements for Review Import Result feature:

- When you import an offline agreement using intelligent import and then review the imported document, the Review Import Result pane now only shows the fields and clauses which are completely processed and identified by the KIRA server and those fields and clauses are marked with black color in the review pane.
- You can now untag the incorrectly tagged and marked fields and clauses in your imported document.

#### Get Started

For more details on enhanced reviewing process for imported agreements, refer to [Intelligent Import](#) in *X-Author Contracts on Salesforce Winter 2019 User Guide*.

## Hiding X-Author Actions

Winter 2019 release has introduced the ability to hide action buttons if the protection mode of the agreement is: *Read Only*, *Fill in Form Fields*, or *Insert Comments*. The action buttons hidden from your X-Author Contracts tab are:

- Mark Field
- Mark Clause
- Hide Smart Boundaries
- Playbook
- Promote Clause
- Control Panel: Show Fields for marking and Show clause library for marking checkbox are disabled too.

## 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-18834-S9N2N9	XA-3542	When you refreshed a clause or publish a template that had tables containing smart clauses, the table was removed from the template.
CAS-17646-M6Q4B1	XA-3540	When you validated and checked in an imported agreement document that contained a smart email field you encountered an error and were unable to check in the agreement.
N/A	XA-3454	When you clicked Review Import Results after importing an offline document, you sometimes encountered an incorrect message that the document was already reviewed.
CAS-12645-L2R3N3	XA-3136	When you check in an agreement as final, the clause content reverted to its original text and the subsequent modifications done during negotiation were lost.
CAS-12508-S5H6P3	XA-2973	When you selected <b>Update Current Version</b> while checking in an agreement document, the <b>Reconcile Document</b> option was disabled.

The following table lists the known issues resolved from the previous release.

Apttus Internal ID	Description
XA-2628	If you had enabled the new Salesforce Files system in your Contract Management org, the <b>Update Current Version</b> option was not available from X-Author Contracts.
XA-2635	If you had a file system enabled in Salesforce, you could not update the current version during check-in from X-Author Contracts.

## Known Issues

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

Apttus Internal ID	Issue
XA-3236	When you check in an agreement document without changing the value of any smart field, the message prompt does not appear.
XA-3183	If you're using Microsoft Word Version 1808, action buttons on the X-Author Contracts ribbon are active before establishing the connection.
XA-3146	When you check-in a template with a new locale value, the values of the fields under Enable Formatting are not updated according to the locale.
XA-3119	When you review a modified clause in a merged document, you have to accept and reject changes individually. This is a Microsoft Word limitation
XA-3116	<p>When you merge two agreement documents and then accept or reject the changes from the Revisions pane, the cursor keeps jumping to the top of the page. This is a Microsoft Word limitation.</p> <p><b>Workaround:</b> Instead of using the Revisions pane to accept and reject changes, individually accept or reject each change by right-clicking the change and selecting the Accept Change/ Reject Change action.</p>
XA-3114	Comparing two documents with smart fields of type date produces an error. This is a COM exception that occurs because Microsoft Word doesn't allow you to create Content Control elements at certain places in the document.
XA-2775	Due to a Microsoft Word limitation, inserting a nested clause in an agreement document with protection set to <i>Insert Comments and Track Changes</i> , shows incomplete redlining of the nested clause.
XA-2768	Deleting a row in a repeat-table and then performing Update from Salesforce, fails to update the values of all the remaining rows under the deleted row.
XA-2869	Reconciliation of Date field is not working as designed. If you enter dates in dd/MM/yyyy format on the date field, after 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 <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-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.

Apttus Internal ID	Issue
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 <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 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.
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 is lost.

Apttus Internal ID	Issue
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 the 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-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 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 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 <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 © 2020 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: XACSFWIN19RNREVA20200224