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## **X-Author for Contracts February 2017 Release Notes**

16 March, 2017



# Table of Contents

<b>About Release Notes</b>	<b>4</b>
<b>Packages</b>	<b>5</b>
<b>Feature Summary</b>	<b>6</b>
<b>Localization of Currency, Number, Date and Percent Fields in X-Author (FX2)</b>	<b>6</b>
Get Started	9
<b>Hide Smart Boundaries for 3rd Party Users</b>	<b>9</b>
Get Started	9
<b>Template Support for Objects with No Name Field</b>	<b>9</b>
<b>Clause Formatting on Insert Clause (FX2)</b>	<b>10</b>
Get Started	10
<b>Enhancement to Update From Salesforce</b>	<b>11</b>
Get Started	11
<b>Resolved Issues</b>	<b>12</b>
<b>Known Issues</b>	<b>14</b>

# About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#) that are required to upgrade to this release
- [Feature Summary](#): 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](#)



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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 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>	9.0.0306
Apttus Contract Management <b>(New)</b>	8.7.0368

# Feature Summary

The following features are new to X-Author Contracts in this release. All features are supported for FX2 templates and documents only.

- [Localization of Currency, Number, Date and Percent Fields in X-Author \(FX2\)](#)
- [Hide Smart Boundaries for 3rd Party Users](#)
- [Template Support for Objects with No Name Field](#)
- [Clause Formatting on Insert Clause \(FX2\)](#)
- [Enhancement to Update From Salesforce](#)

## Localization of Currency, Number, Date and Percent Fields in X-Author (FX2)



To use the latest localization feature of X-Author Contracts, make sure you have following packages installed in your org:

- [Apttus Proposal Management \(8.2.0144\)](#)
- [Merge Service \(4.8.2\)](#)

X-Author Contracts now offers a solution for Template Administrators to apply configurable localization to templates. Template Administrators now have the ability to:

- Specify the **Locale** when creating a new template or cloning a template, or change the locale of a template at check-in. At template creation, admins can choose the Currency Format, Date Format, and refine Number, Currency and Percent precision for the whole template.

X-Author Contracts

**Specify Template Attributes**  
Specify the attributes for this new template.

Do you want to create this template using the FX2 format?  Yes  No

• **Type** Agreement

• **Business Object** Apttus\_\_APTS\_Agreement\_\_c

• **Locale** English (United States)

**Enable Formatting**

**Date Format** M/dd/yyyy

**Currency Format**  ISO Code  Currency Symbol  None

**Currency Precision** 2

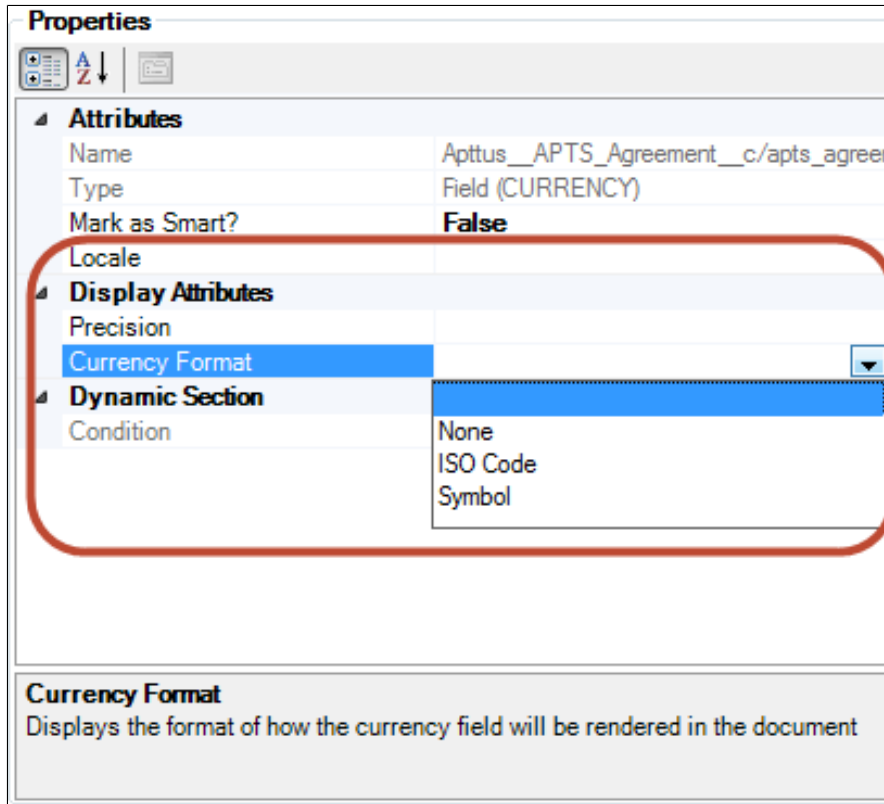
**Number Precision** 0

• = Required Information

OK Cancel

## Release Notes

- Define the format for **Number**, **Currency**, **Date** and **Percent** fields using the Control Panel. Preserve the locale for fields in inserted clauses at the template level, while making specific changes to other field formats as needed. Generated documents conform to template locale except where specified at the field level.



Combining the above features allows Template Administrators to use multiple locale formats in templates, while maintaining a default locale and format for subsequent document generation.



- If you have not selected Locale value at the field level for the date field in the localized template, then its Date Format will be inherited from the template level settings.
- If you select the Locale value for a date field from its Field Properties pane, then the Date Format attribute will display the list of values corresponding to Locale selected at the field level, and you can select the desired format.





- Template localization features are not supported for orgs with Template Versioning enabled.
- Locale formatting for templates is only supported in the FX2 format.

## Get Started

To define locale for your template, refer to [Defining Template Locale](#).

## Hide Smart Boundaries for 3rd Party Users

The Hiding Smart Elements feature introduced in May 2016 has been enhanced to give contract managers more control over the display of smart elements. The following changes have been made:

- The new Comply System Property “Hide Content Control Borders” is now available. When checked, smart boundaries (content control borders for smart fields and clauses) are hidden in generated documents.
- Smart elements remain automatically displayed in a generated document when a field /clause is marked. X-Author users still have the option to manually show/hide boundaries.

## Get Started

For more information on hiding smart boundaries in agreements, refer to [Hiding Smart Boundaries](#).

For a description of the Comply System Property introduced in this release, refer to [Comply System Properties](#) in the Appendix of the *Contract Management Administrator Guide*.

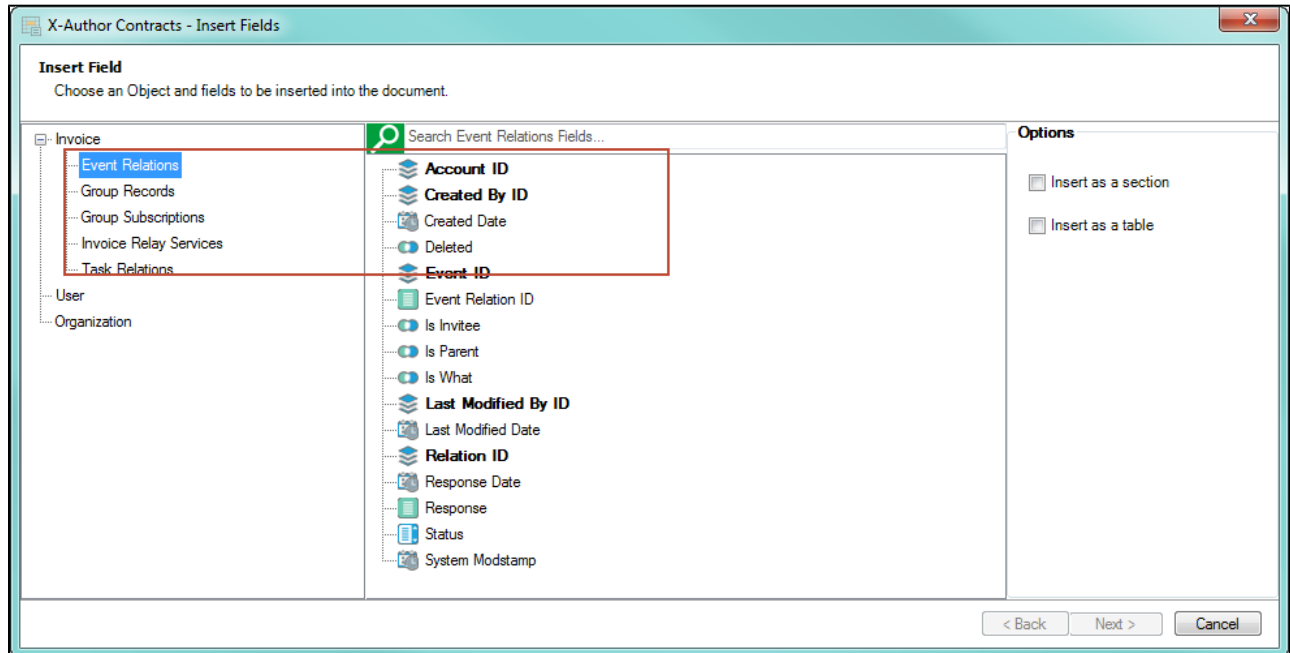
## Template Support for Objects with No Name Field

This update provides an enhancement for authoring templates for custom objects. The following fixes are included:

- Support has been added for the **Event** object. Fields from the Event object can now be used in templates.

## Release Notes

- Support has been added to allow fields from Objects with no "Name" field to be used in templates. This requires configuration of an Admin Property in Comply. Refer to the *Contract Management August 2016 SP1 Patch 2 Release Notes* for more information.



## Clause Formatting on Insert Clause (FX2)



To use Clause Formatting on Insert Clause feature of X-Author Contracts, make sure you have Merge Service (4.8.2) installed in your org.


X-Author for Contracts has introduced new feature that allows Template Administrators to choose whether to adopt template formatting or retain clause formatting when a clause is inserted into a template. This update provides support for and works in conjunction with the February 2017 Merge Service update. The feature also allows contract negotiators to choose template or clause formatting when inserting a clause into a generated document. This feature is introduced experimentally. Refer to the *Merge Service February 2017 Release Notes* for more information.

## Get Started

To use retain clause formatting functionality while inserting clause, refer to [Clause Formatting on Insert Clause](#) in [Using the Playbook](#) section.

## Enhancement to Update From Salesforce

This update provides enhancement for how smart fields are handled in generated documents. Each smart field will now be associated with a specific Salesforce record ID. This enhancement works with the February 2017 Merge Service update and is intended to provide a solution for enhanced 'Update from Salesforce' functionality in the latest version of X-Author for Contracts, for cases where the new agreement document has been cloned from a different record (imported as an offline agreement, amended, renewed, etc.).

 Any such document requires an Update from Salesforce before it can be used as a contract document.

Refer to the *Merge Service February 2017 Release Notes* for more information.

### Get Started

For more information on Update from Salesforce, refer to [Updating Smart Fields from Salesforce \(FX2\)](#) in [Working with Agreements in FX2 format](#) section.

## Resolved Issues

The following table represents resolved issues in this release:

Case Number	Description	Apttus Internal Case Number
<b>X-Author Contracts 9.0.0306</b>		
203649	In some cases, when a user attempted to insert a clause into a repeat section, an error was thrown and the clause could not be inserted. This issue has been resolved. Clauses can now be inserted into repeat sections without error.	XA-1888
205562	When a user used Proposal Line Item fields in a template, the precision value of the field did not pick up the value set from the field level. This issue has been resolved. The new localization feature in X-Author Contracts, allows the user to set the precision value at the field level.	XA-2151
187169	<p>On cloning a template that had template versioning enabled, user was not able to see or track the parent version of a template cloned from another template. This issue has been resolved. User can now see the parent version of the current template version in the <b>Versions</b> related list in the template details page in Contract Management.</p> <p>To learn more about template versioning enhancement, refer to <a href="#">Cloning Template Versions</a> in <a href="#">Template Versioning</a> topic in <i>X-Author for Contracts February 2017 User Guide</i>.</p>	CLM-1891

Case Number	Description	Apttus Internal Case Number
	When a customer installed X-Author for Contracts, it showed up as an un-managed connected app in their org and hence the administrator was not able to manage the policy profiles for the connected X-Author app. This issue has been resolved. X-Author for Contracts now works as a managed app in Salesforce.	CLM-2513

The following issues have been resolved from the previous releases:

Apttus Internal Id	Description
XA-1941	When a user was connected to a multi-currency org and used X-Author to "Update from Salesforce", currency fields were not updated in the document. This issue is now resolved. Now when the "Update from Salesforce" process is completed, the currency fields on Agreement Document show the same value as the Agreement Record.
XA-1842	When a user marked the static text as a clause, the 'Edit Properties' label in the Control Panel displayed a blank option even though it was functional. This issue is now resolved. When a user tries to mark the static text as a clause, the 'Edit Properties' label shows the Mark option in the Control Panel.

# Known Issues

The following table represents known issues in this release:

Apttus Internal ID	Issue
<b>X-Author Contracts 9.0.0306</b>	
XA-2356	When trying to login into X-Author Contracts in Microsoft Word, script error pops up saying "An error has occurred in the script on this page."
XA-2260	After changing the content of a marked clause and viewing it in control panel by clicking <b>Show Changes</b> , removes one character from the clause in the changes screen.
XA-2281	On inserting the wrong date format or alphabets in a date in the template, the date value is changed automatically.
XA-2289	Inserting localized clause having Long Date formats at field level, to the non-localized template, may display gibberish values in the long date values.
XA-2307	When a user performs Update from Salesforce action on a generated agreement document which does not have values for the first column of the repeat table, then X-Author Contracts shows blank screen.
XA-2316	Performing Refresh/ Publish action in a template shifts the header/ footer clause content to the main clause content.
XA-2327	When a user performs reconciliation on checking in an agreement document with multiple instances of a smart field, X-Author updates all the instances of the smart field values to a single value.

Apttus Internal ID	Issue
XA-2349	On checking in a supporting document template with more than 200 clauses, the clause references disappear from the template document.
CLM-2482	When a user selects an agreement document from the Search by User results while checking out an agreement document in X-Author Contracts, the agreement document fails to check out.
<b>X-Author Contracts 8.5.1010</b>	
XA-1931	After checking in a combined document, X-Author ribbon menu items are getting disabled for the original document. Checking out the original document will enable menu items.
XA-1932	When a user attempts to check in a merged document where the original document was non version-aware, an error is displayed 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.

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## Release Notes

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