

APTTUS[®]

X-Author Chatter on Salesforce Winter 2018 Integration Guide

12/05/2018

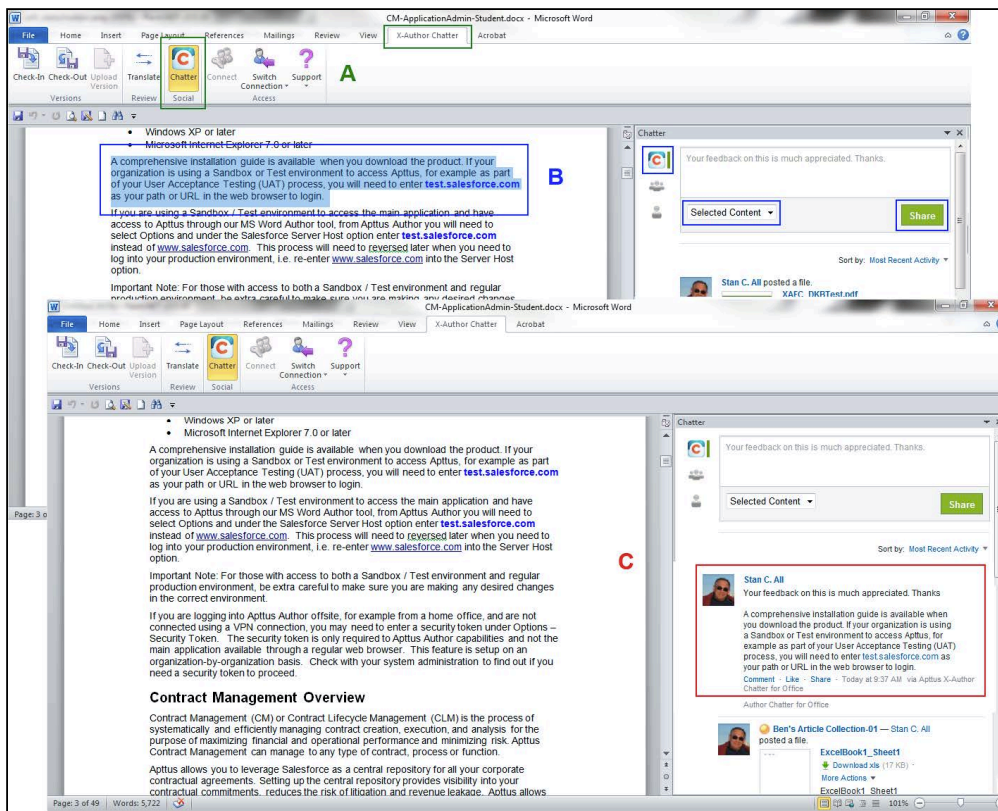
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Overview

X-Author Chatter seamlessly combines your Microsoft Office suite and Chatter's social network capabilities, for sharing and collaborating on documents and projects. There is no need to login to Salesforce to access your documents and data. It can all be done via the X-Author Chatter ribbon. With the ribbon in your MS Office products you can check-in, check-out, and update the revision of files kept in Salesforce. Ribbon options are also used to display Chatter and the translation tool. Once displayed, the Chatter pane sits alongside your document within the same MS Office window. You can work on your documents and simultaneously engage in a dialog with anyone in your organization from one place. When you do not need Chatter you can close it and re-open it later.



- A – Selecting the X-Author Chatter ribbon and then Chatter displays your current feed.
- B – Select the text you want to copy, choose who you want to share it with and whether you want to include the whole document, and click Share.
- C – The content is included in the Chatter feed and your colleagues can now comment on it.

What's New

The following table lists changes in the documentation to support each release.


Document	Topic	Description
Winter 2018	Configuring System Properties	New topic. Added a new topic to capture System Properties.
	Configuring Additional Values	New topic. New feature for this release.
	Configuring Search Criteria	New topic. New feature for this release.

Installing X-Author Chatter

Apttus X-Author Chatter must be installed locally on your computer before you can begin using it. X-Author Chatter is a Microsoft Office Add-In, which is accessible as a ribbon tab.

If X-Author Chatter has been installed by your IT department, then you can skip this section as there are no further installation steps required.

The installation is done using a wizard, where all of the installation options are handled automatically. If you do not have all of the framework components installed to use X-Author, they will automatically be included by the wizard during the installation.


 The Apttus X-Author for Chatter folder that is installed on your computer must not be moved and the files must not be modified or the application will not work.





To install X-Author Chatter

Prerequisites

- You must have a Chatter enabled Salesforce account.
- You must have the Microsoft Office products already installed and ensure they are not currently open.

Installing X-Author Chatter

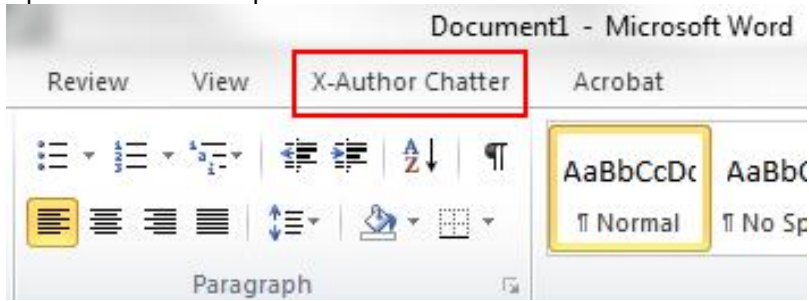
1. Login via <http://login.salesforce.com>.
2. Click the **X-Author Chatter** tab or click  to display all tabs and then select it.
3. Click the download icon for the relevant MS Office product:

MS Office Product	Icon
Word	
Excel	
Outlook	
PowerPoint	

The installation behaves the same for each product.

4. Click **Save file** and then double-click the file once it is downloaded to launch the installer.
5. Follow the instructions in the Install Wizard, by clicking **Next** to progress the installation.
6. You must also select **I accept the terms in the license agreement** as part of the installation.
7. Click **Finish** once the installation is complete.

8. Open the Microsoft product and confirm the X-Author Chatter ribbon option is available.



If the ribbon is not available, it may need to be registered manually.

Results

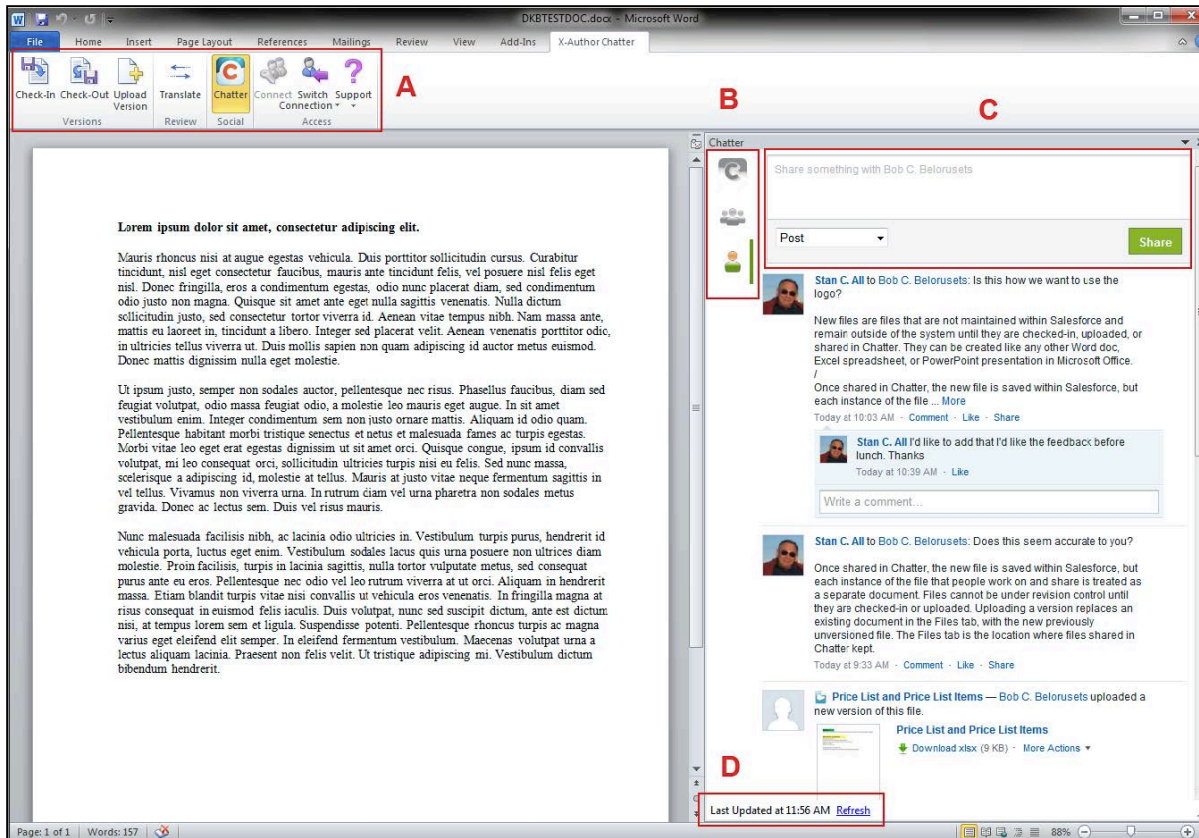
X-Author is now ready for use with the Microsoft product, enabling you to use chatter to collaborate on your work.

Next Step

You can return to [Step 3](#) and go to the X-Author Chatter tab in Salesforce and install the remaining products.

Working with X-Author Chatter

X-Author Chatter presents four unique pieces of functionality that enable you to control files using Salesforce, collaborate on them, and translate them. Apart from those pieces, the Microsoft Products and Chatter work as expected with all of their standard functionality being available.



A - The X-Author Chatter ribbon is used to check-in, check-out, and update the revision of files. This helps to ensure you do not have multiple copies of a document. The Translate option provides the ability to quickly translate content using one of 39 supported languages. The ribbon is also used to invoke Chatter.

B - The audience for the content you want to share and collaborate on can be your entire organization, custom groups, individuals you follow and that follow you, or a document associated with a Salesforce object that can be followed, such as Opportunity.

C - The comments and sharing options control how much of the document you are working on you are going to share with your targeted audience in the Chatter feed. Once in the feed, standard Chatter actions can be used with the content.

D - The Chatter feed will automatically refresh; however, you can also manually refresh the feed by clicking Refresh. This helps to ensure you are receiving feedback from colleagues as soon as they add a comment to the feed.

Connecting to X-Auth Chatter

To use X-Auth Chatter, you do not need to login directly via Salesforce. You only need to connect from the X-Auth Chatter ribbon for the MS Office product you want to use.

X-Auth Chatter uses Salesforce OAuth for connecting from X-Auth to Salesforce. By using OAuth multiple user accounts can be set up on the same computer for logging into X-Auth Chatter. Once added, you can simply switch from one user to the other, via the Switch Connection option.

To connect to X-Auth

Prerequisites

You must have an MS Office product open.

Steps

1. Click **Connect** and the Manage Connections window is displayed.
2. In the **Create a new connection** section, enter the first name and last name – as they are stored in Salesforce – of a user with a chatter license and click login.salesforce.com or test.salesforce.com.
3. Click **Authorize** and a Salesforce login window is displayed, enter your credentials and click Login.
4. If you are connecting to Salesforce via X-Auth for Chatter for the first time, you may need to click **Allow** to continue.

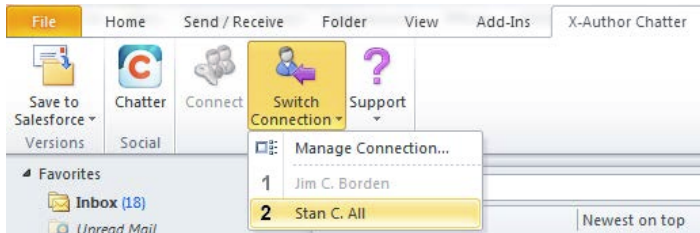


Results

The X-Author ribbon options are enabled and you can now log in to Chatter, **Check-In** and **Check-Out** files, or additionally, display the **Translate** pane when logging into Word.

What's Next

Once you have configured connections for multiple users, you can select Switch Connection to change to someone else.



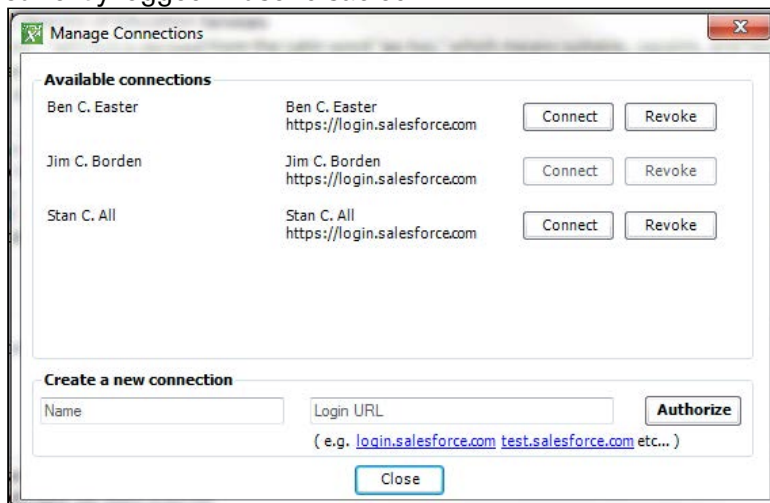
To revoke connections

Prerequisites

There must be existing connections.

Steps

1. Select **Switch Connection > Manage Connection** to display the Manage Connections window. The list of users who have been configured for that computer is displayed, with the option for the currently logged in user disabled.



2. Click **Revoke** and then click **Yes** in the confirmation dialog.

Results

That user's login credentials are removed and they cannot log in to X-Author for Chatter until they have created a new connection.

Using New Files

New files are those Microsoft Office files that are not currently maintained within Salesforce and remain outside of the system until they are checked-in, uploaded, or shared in Chatter. They can be created like any other Word doc, Excel spreadsheet, or PowerPoint presentation.

Once shared in Chatter, the new file is saved in Chatter > Files, but each subsequent instance of the file that people work on and share is treated as a separate document. Files are not under version control until they are uploaded or checked-in.

When you want to put a new file into Salesforce via X-Author Chatter and have its version controlled, you can either upload the file as a new version of an existing already kept in Chatter > Files or check-in the file into Chatter > Files as the first version of a brand new file.


For details on checking in files, see [Checking in files](#).

To upload a version

Prerequisites

- The file must be saved on your computer and have not previously been uploaded to Salesforce.
- There must be an existing file in Chatter > Files that you want to overwrite with this new file.

Steps

1. Click **Upload Version**, select the Scope the file has in Chatter, enter a name, and click .
2. Click **Select** for the document that matches the document you want to upload.
3. Enter details about this version of the document, to ensure there is a useful audit trail entry and click **OK**.

Results

A confirmation dialog box indicates the upload was successful and displays the new version of the file.

Checking Out Files

Checking out files and attachments that are in Salesforce ensures that you are working on the most recent version of the file.

You can check-out files that are saved in Chatter > Files or those that are in the Notes and Attachments section of objects, such as Opportunities or Accounts. Multiple people can check-out the same file at the same time and subsequently check-in new separate versions. So to ensure each version of a document has the expected content in it, your organization should set up guidelines around document sharing.

Whether you have access to files in Chatter or in Notes and Attachments is controlled by standard Salesforce file sharing settings and Standard Salesforce access rights to objects. There is no restriction on the number of files you can check-out. If there is an issue with documents while you are working on them, standard Microsoft Office backup and recovery functionality is used.

To check out files



Prerequisites

There must be files available in Salesforce that can be opened by the MS Office product.


Steps

1. Click **Check-Out** and from the **Objects** list, select Files to check out a file kept in Chatter > Files and go to the next step.
- or -
Select an object, such as Opportunity or Account, if the file is kept in Notes and Attachments and go to step 4.
2. Click **Show Criteria** and select the **Scope** option for the Chatter file:

Scope	Description
Files I Own	Files you created and previously uploaded to Chatter.
Files Shared with Me	Files created by others, who have chosen to specifically share them with you. If files have been shared with you via Groups, they do not fall under this scope.
Files I Follow	Files you have chosen to follow from within a Chatter feed.
Files in My Group	Files that have been shared with a Chatter group you are a member of.

3. Enter a name or partial name for the file, if known, click  and go to step 7. To configure the fields available for search filters, refer to [Configuring Search Criteria](#).
4. Click **Show Criteria** and select **Files** to choose from those that have been uploaded via a Chatter feed within the object and are kept as **Feed Attachment** files in the Notes and Attachments section of the object.
- or -
Select **Attachments** to choose from files that were uploaded outside of Chatter to the **Notes and Attachments** section.
5. Enter a name or partial name for the object record and click . To configure the fields available for search filters, refer to [Configuring Search Criteria](#).
6. Click **Select** beside the object that contains the file you want to open.
7. Click **Open** besides the file you want to work on.
Only files and attachments that can be opened by the MS Office product are available in the picklist. For instance, with Word .rtf, .txt, .doc, and .docx files will be displayed.

Results

The file is displayed and the ribbon icons are enabled. If you check-out a file that is associated with an object, the  icon is displayed in the Chatter feed.

What's Next

You can edit the file as normal and also use the **X-Author Chatter** ribbon option to begin collaborating on the document.

Collaborating with X-Author Chatter

With Word, Excel, PowerPoint or Outlook open and connected to X-Author, you do not need to go into Salesforce to perform tasks.

You can edit files, view, and interact with Chatter feeds. This includes sending document updates to other Chatter users and taking content they provide via Chatter and putting it into your file.

Your Chatter feed can be quickly displayed and hidden with a single click. After you have collaborated on a file and received feedback, you can hide the feed to maximize your workspace and open it again to share your subsequent edits.

When you are working on files with X-Author Chatter, two main aspects control collaboration and sharing: who you collaborate on the file with, and what parts of the document you share with them.

Collaboration Options

The following collaboration options are available:

Collaboration Options	Description
All	Everyone in your organization who is on Chatter will see the content you share in the feed.
Groups	You can select one group at a time to share the file with and everyone belonging to that group will have visibility into the shared file.
Followers of the document	Everyone who is following the document will have the document shared with them and can provide comments and collaborate in the feed. Documents must be part of an object to be followed. Files uploaded solely to Chatter will not have this option available.
Followers of you and who you follow	You can select a single person to share the file within your feed. If you want to share with a large number of people you should use a group, otherwise you will have to repeat the step of selecting individuals to share the feed with.

Sharing Options

The following options for sharing content are available:

Word Share Options	Description
Post	Comments you provide in Chatter are included, but no part of the document is included.
Selected Content	The content highlighted in your document is inserted into the Chatter feed, as unformatted text. There is a maximum of 1000 characters.
Entire Document	The document is attached to the feed.
Both	Highlighted content (up to 1000 characters) and the document (as an attachment) are included in the feed.

Excel Share Options	Description
Post	Comments you provide in Chatter are included, but no part of the workbook is included.
Selected Content	The selected content is exported and attached to the Chatter feed as a new xls file. All selected content must be in adjoining cells. The minimum content that can be selected is a whole cell. Selected text within a cell cannot be shared.
Active Worksheet	The entire worksheet is copied and attached to the feed as a new xls file.
Entire Workbook	The whole workbook is attached to the feed.

PowerPoint Share Options	Description
Post	Comments you provide in Chatter are included, but no part of the presentation is included.
Selected Content	The content highlighted in your presentation is inserted into the Chatter feed, as unformatted text. There is a maximum of 1000 characters. If you select images or multiple objects, it is inserted as a .png file.
Selected Slides	You can select any whole slides in any sequence from the Slides tab in PowerPoint and they are attached to the feed entry as a single .ppt file. The slides are placed in the order in which you select them. The feed entry indicates which slides were included in the .ppt file. The selected slides will be exactly like they are in the original .ppt, except auto-numbering may be different.

PowerPoint Share Options	Description
Entire Presentation	The whole PowerPoint presentation is attached to the feed.

Outlook Share Options	Description
Post	Enter a comment to solicit feedback, while not copying any content from the body of the email or any email attachments.
Selected Content	Highlight content from the body of your email and it will be included in the feed entry, without any formatting.
Attachments	For a single attachment, select whether to Upload as a new version to an existing file or to Upload as a new file. A new version means that it would become the new version to a file you already have in your Chatter > Files. You use the Upload Version dialog box to search for the file stored in Chatter you want to attach as the new version. A new file is added to your Chatter feed and subsequently is available from Chatter > Files.
Message	Selecting this enables a drop-down list with the following options: <ul style="list-style-type: none"> • .doc - Attaches the email to the feed as a Word file. • .html - Attaches the email to the feed as an html file. • .msg - Packages the email and all attachments into an Outlook .msg file and attaches it to the feed. This file can only be opened with Outlook. • .rtf - Attaches the email to the feed as a Word file. • .txt - Attaches the email to the feed as a text file.

Collaborating using Word

Working in Word, you can choose to share specific content, whole documents, or both in Chatter, as well as automatically translating that specific content and sharing it.





To Collaborate Using Word

Prerequisites

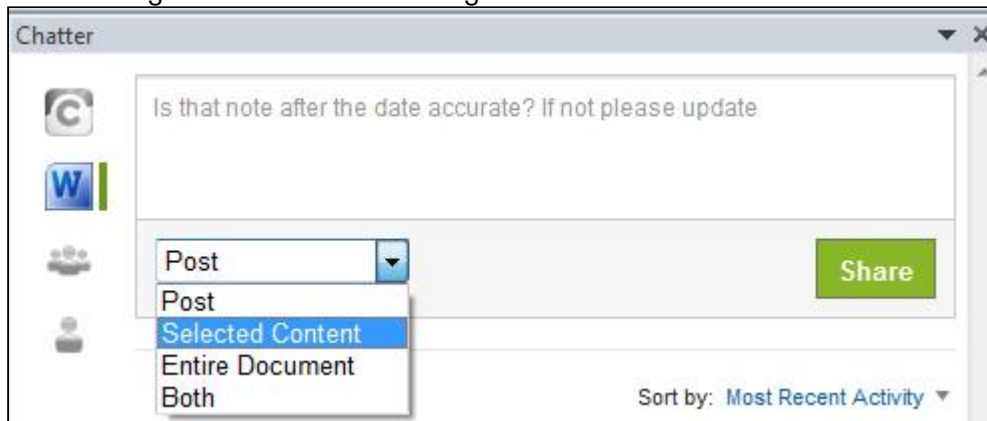
- The Salesforce org must have Apttus X-Author Chatter package installed.
- You must have logged into X-Author Chatter for Word and opened the file in Word.

Steps

1. Click **Chatter** from the **X-Author** Chatter ribbon.
Chatter opens in its own window within Word and you may need to resize the document for optimal viewing.
2. Select who you want to collaborate with in your Chatter feed by clicking one of the icons:

	Your audience will be everyone in your organization with a Chatter account.
	Your audience will be everyone who is following the document. This option is only available when the document is associated with a Salesforce object, such as an Account or an Opportunity.
	Your audience will be all the members of the group you select.
	Your audience will be the single individual you select.

3. Make changes to the document using Word and then choose what content to share.



Post	Enter a comment to solicit feedback, while not presenting any of the document in the feed.
Selected Content	Select the content in the document you want to share in the feed. Only text will be included in the feed. If your content includes an image or other kinds of media, it will be represented with a '/' and table cell content is taken out of the table and included on individual lines.
Entire Document	The whole document is attached to the Chatter feed entry and standard Chatter actions can be taken on the file.
Both	Combination of Selected Content and Entire Document.

4. Click **Share** to share your content to the Chatter feed.

5. Click **Refresh** to ensure you feed is up to date and that you receive feedback from your colleagues.

Collaborating using Excel

You can choose to share some content, a worksheet, or a complete workbook in a Chatter feed. All shared content is uploaded to Chatter as an XLS file.

Unlike Word, you cannot yet share selected content and a complete worksheet or workbook in the same Chatter feed entry. If you wanted to upload both you would need to make them separate entries. Content taken from an Excel file does not include any underlying formulas or equations associated with any cells. It takes the alphanumeric characters currently being displayed in the cells as plain text.





To Collaborate Using Excel

Prerequisites

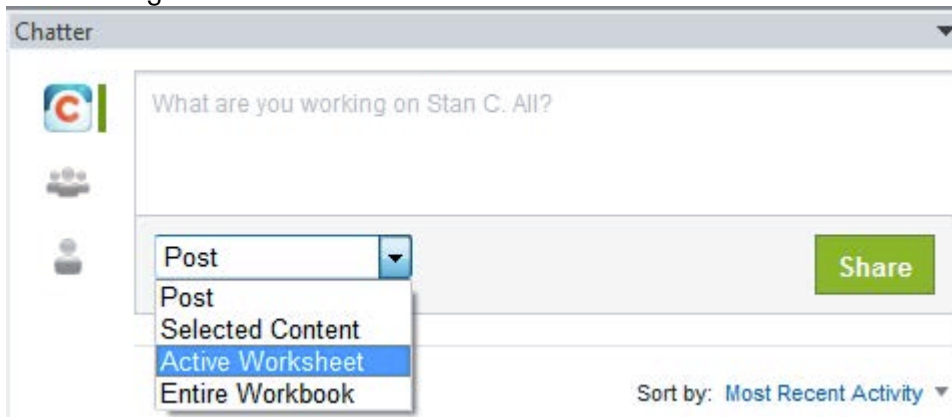
- The Salesforce org must have Apttus X-Author Chatter package installed.
- You must have logged into X-Author Chatter for Excel and opened the file in Excel

Steps

1. Click **Chatter** from the **X-Author** Chatter ribbon.
Chatter opens in its own window within Excel and you may need to resize the workbook for optimal viewing.
2. Select who you want to collaborate within your Chatter feed by clicking one of the icons:

	Your audience will be everyone in your organization with a Chatter account.
	Your audience will be everyone who is following the file. This option is only available when the document is associated with a Salesforce object, such as an Account or an Opportunity.
	Your audience will be all the members of the group you select.
	Your audience will be the single individual you select.

3. Make changes in excel and then choose what content to share.



Post	Enter a comment to solicit feedback, while not presenting any of the document in the feed.
Select ed Conte nt	Select the content in the document you want to share in the feed. Only text will be included in the feed. If your content includes an image or other kinds of media, it will be represented with a '/' and table cell content is taken out of the table and included on individual lines.
Active Works heet	The currently active worksheet is exported as a workbook and attached to the feed.
Entire Workb ook	The whole workbook is attached to the Chatter feed.

4. Click **Share** to share your content to the Chatter feed.
5. Click **Refresh** to ensure you feed is up to date and that you receive feedback from your colleagues.

Collaborating using PowerPoint

Collaborating on PowerPoint files enables content to be shared from the text level, up to the entire presentation.

If you only want to share an image, it is best to share the entire slide containing the image, to retain its original properties. Just sharing an image in Chatter uploads it to the feed as a png file which may not be the same quality as the original.




To Collaborate Using Excel


Prerequisites

- The Salesforce org must have Apttus X-Author Chatter package installed.
- You must have logged into X-Author Chatter for PowerPoint and opened the file in PowerPoint.

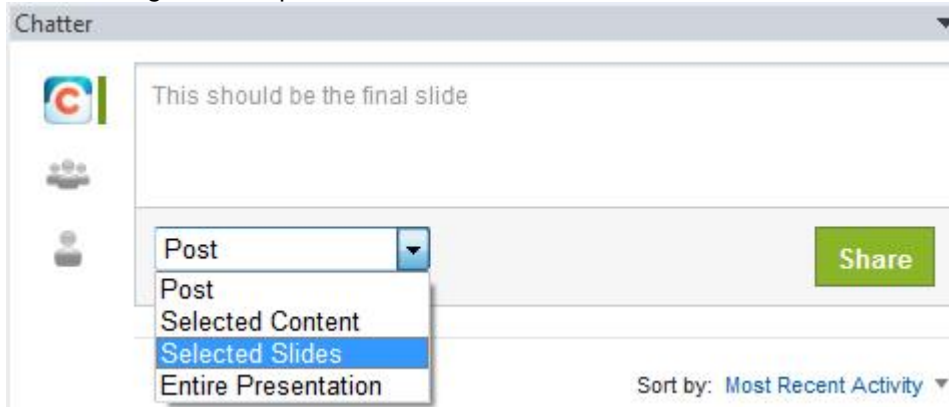
Steps

1. Click **Chatter** from the **X-Author** Chatter ribbon.
Chatter opens in its own window within PowerPoint and you may need to resize the file for optimal viewing.
2. Select who you want to collaborate within your Chatter feed by clicking one of the icons:

	Your audience will be everyone in your organization with a Chatter account.
	Your audience will be everyone who is following the file. This option is only available when the document is associated with a Salesforce object, such as an Account or an Opportunity.
	Your audience will be all the members of the group you select.

 Your audience will be the single individual you select.

3. Make changes to the presentation and then choose what content to share.



Post	Enter a comment to solicit feedback, while not presenting any of the document in the feed.
Selected Content	Selected text is entered into the feed unformatted. When your selected content is an image, drawing objects, or made up of table rows or columns, the content is attached as a png file.
Selected Slides	You can select any slides in any sequence from the Slides tab in PowerPoint and they are attached to the feed entry as a single .ppt file. The slides are placed in the order in which you select them. The feed entry indicates which slides were included in the .ppt file. The selected slides will be exactly like they are in the original .ppt, except auto-numbering may be different.
Entire Presentation	The whole PowerPoint presentation is attached to the Chatter feed.

4. Click **Share** to share your content to the Chatter feed.
5. Click **Refresh** to ensure you feed is up to date and that you receive feedback from your colleagues.

Collaborating using Outlook

Outlook provides the ability to share the content of an email or an email attachment in Chatter, along with the ability to share the entire contents of an email, attachments included. When replying to a message or creating a new one, you can also choose to immediately post that email and its contents to your chatter feed.

Using X-Author Chatter for Outlook enables you to take communications that have come from outside of your organization and quickly bring that content into Salesforce and share it with colleagues.

⚠ If you are using Microsoft Outlook 2007, you must open an email in a new window to get the X-Author Chatter tab. Outlook 2007 lacks the ribbons to display the tab from your inbox.




To Collaborate Using Outlook

Prerequisites

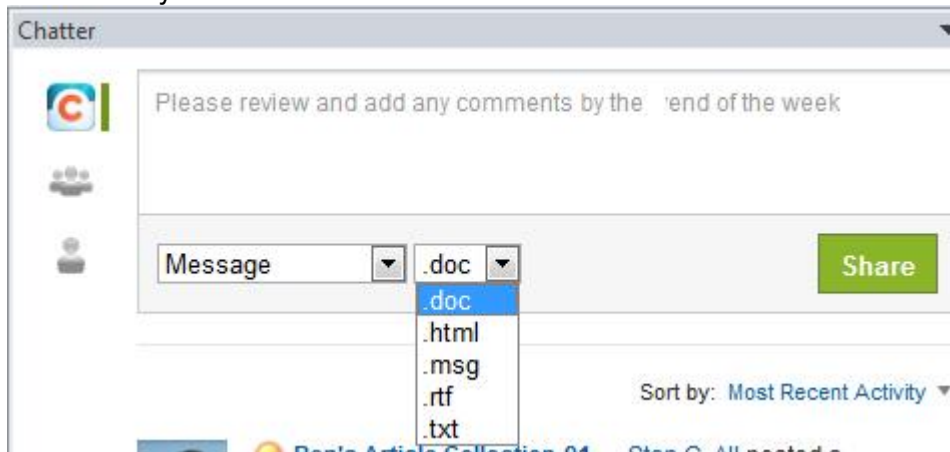
The X-Author Outlook add-in must have been installed and you are connected.

Steps

1. Click **Chatter** from the **X-Author** Chatter ribbon.
Chatter opens in its own window within Outlook and you may need to resize it for optimal viewing.
2. Select who you want to collaborate within your Chatter feed by clicking one of the icons:

	Your audience will be everyone in your organization with a Chatter account.
	Your audience will be all the members of the group you select.
	Your audience will be the single individual you select.

3. Select how you want to share content in the feed



Post	Enter a comment to solicit feedback, while not copying any content from the body of the email or any email attachments.
Selected Content	Highlight content from the body of your email and it will be included in the feed entry, without any formatting.

<p>Attachments</p>	<p>For a single attachment, select whether to Upload as a new version to an existing file or to Upload as a new file. A new version means that it would become the new version to a file you already have in your Chatter > Files.</p> <p>You use the Upload Version dialog box to search for the file stored in Chatter you want to attach as the new version. A new file is added to your Chatter feed and subsequently is available from Chatter > Files.</p>
<p>Message</p>	<p>Selecting this enables a drop-down list with the following options:</p> <ul style="list-style-type: none"> • .doc - Attaches the email to the feed as a Word file. • .html - Attaches the email to the feed as anhtmlfile. • .msg - Packages the email and all attachments into an Outlook .msg file and attaches it to the feed. This file can only be opened with Outlook. • .rtf - Attaches the email to the feed as a Word file. • .txt - Attaches the email to the feed as a text file.

4. Click **Share** to share your content to the Chatter feed.
5. Click **Refresh** to ensure you feed is up to date and that you receive feedback from your colleagues.

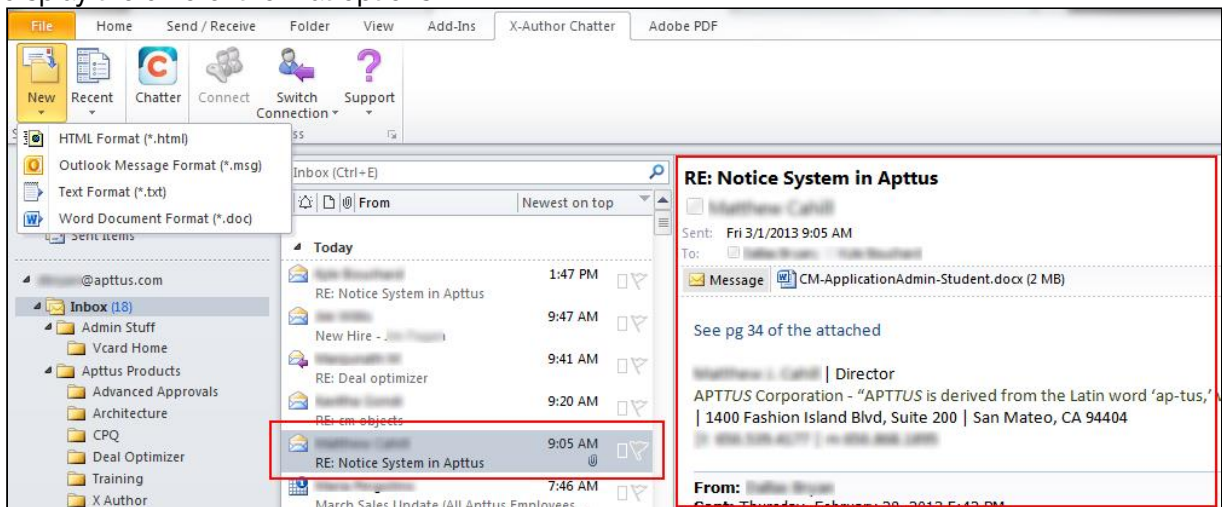
To save emails to Salesforce

Prerequisites

The X-Author Outlook add-in must have been installed and you are connected.

Steps


1. Select the email you want to save and select **New** in the **Save to Salesforce** ribbon section to display the different format options.



2. Select one of the following options:

<p>HTML Format (*.html)</p>	<p>Saves the body of the email in an HTML file.</p>
-----------------------------	---

Outlook Message Format (*.msg)	Saves the body of the email and any attachments in a file that can only be opened in Outlook.
Text Format (*.txt)	Saves the body of the email in a text file.
Word Format (*.doc)	Saves the body of the email in a Word file.

3. In the Checkin window, select an **Object** and enter a name or owner name to help refine the search and click .
4. Click **Select** for the specific object record you want to save the file to.

Results

A confirmation message indicates the email was successfully saved to Salesforce.

What's Next

You can go to that object record in Salesforce and see that the message has been added to the Notes and Attachments related list.

To attach a file in Salesforce to a new emails

Prerequisites


The X-Author Outlook add-in must have been installed and you are connected.

Steps

1. In Outlook, click **New E-mail** and from the **Message** tab select Attach Salesforce File.



The default is to use Chatter files. To change this to Attachments, click **Show Criteria** and select **Attachments**.

2. Enter a name or partial name for the object record which contains the file you want to attach and click .
3. Click **Select** beside the object that contains the file and then click **Open** besides the file you want to attach.

Results

The file is now attached to the draft email.

What's Next

You can repeat the task to attach another file or send the email.

To send email to groups

Prerequisites

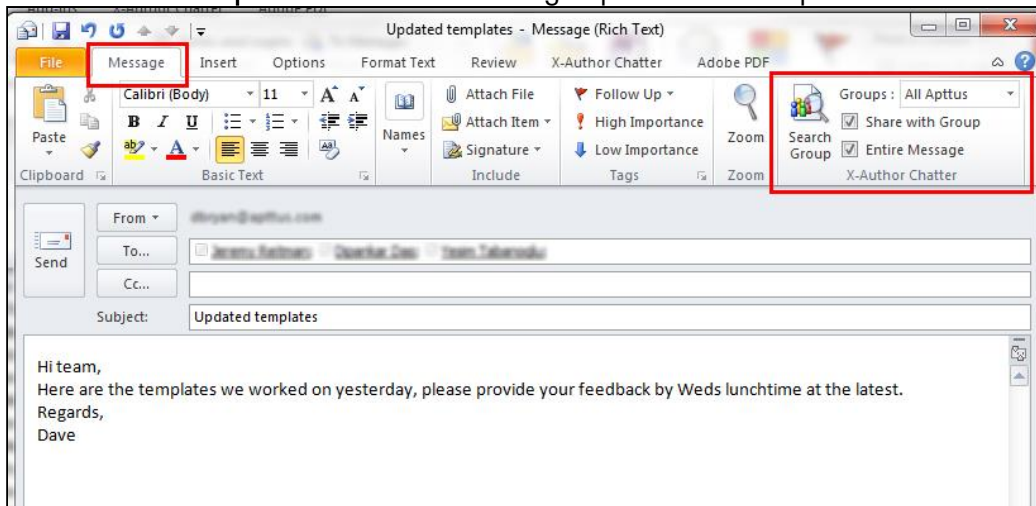
- The X-Author Outlook add-in must have been installed and you are connected.
- You must be a member of at least one Chatter group

Steps

1. In Outlook, click **New E-mail** or reply to an existing message
2. In the **Message** tab, write your email and attach any files, per usual.
3. Select an existing group from the **Groups** list

- or -

Click **Search Group** and select the desired group from the Groups search window.



4. Select Share with Group to take the text of your email body and insert it as a chatter feed entry.

- or -

Select Share with Group and Entire Message to insert the text of the email into the chatter feed, while

also attaching the whole message (email + any attachments as a .msg file) to that chatter feed entry.

Results

The file is now attached to the draft email.

What's Next

You can repeat the task to attach another file or send the email.

To change the chatter feed group

Prerequisites

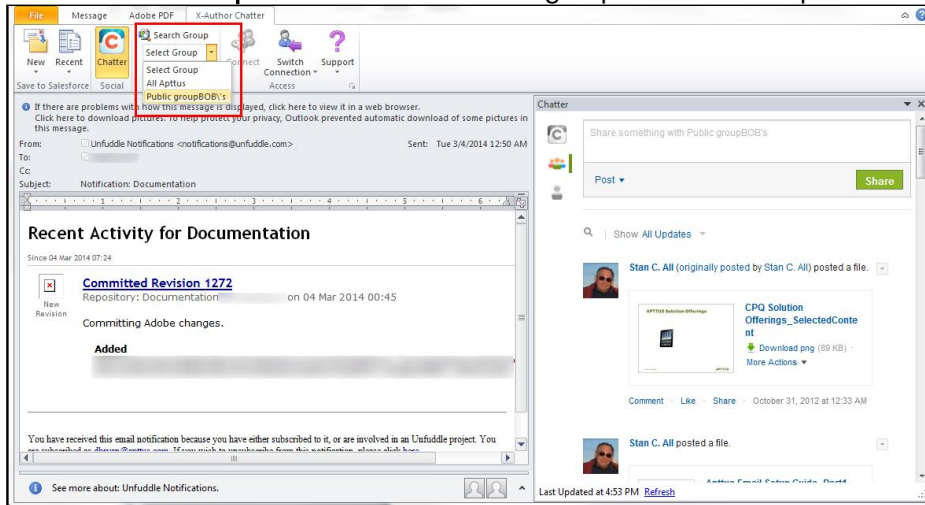
- The X-Author Outlook add-in must have been installed and you are connected.
- You must be a member of at least one Chatter group

Steps

1. Select the **X-Author Chatter** tab.
2. Select an existing group from the **Groups** list

- or -

Click **Search Group** and select the desired group from the Groups search window.



Results

If you have the Chatter feed displayed you will see the feed update to display the group you selected.

Translating Content in X-Author Chatter

You can use X-Author Chatter to do a translation of highlighted content and copy and paste it into your document, all with MS Office.

Translating content directly in X-Author should not replace using professional localization vendors and translators. Especially with important clauses and sales agreement language, you should not assume translated content will be an exact match. As it is an automatic translation, proper nouns may be ignored and translated.

Translated content does not have to be pasted over top of the source content. It can be pasted anywhere in the document, based on where the cursor is placed and if any text has been highlighted. The translated text is not formatted and treated as a single block. It uses the style at the cursor position in the document it is pasted into for formatting. Therefore, any text pasted back into the document that spans multiple lines or paragraphs will not be able to reconcile different styles.

i This feature uses Microsoft Bing Translator. Due to that there is a default limit of 2,000,000 characters which can be translated each month with X-Author Chatter. A message is displayed when you reach the limit. If your organization needs more characters, you can purchase additional capacity via [Windows Azure Marketplace](#).

To Translate Content

Steps

1. Highlight the content you want to translate and click **Translate** to display the content in the Translate pane. The language of the source content is automatically detected. If you do not select content, the Translate pane is still displayed but is empty and you can then highlight the text you want to translate.
2. Select the language you want to translate the content into and click **Translate**. The text in the Translated Content field is read-only.
3. Click **Replace Translated Content** and click **Yes** in the confirmation dialog box and the translated content is copied and pasted.
The content is pasted into the source file at the cursor point. If the original translated content is still highlighted then it will replace it, but the cursor can be placed at any position in the document.

Checking in Files

While Chatter can provide an audit trail for the collaboration process of a document, the ability to check-in a file ensures that it is under version control.

Files are kept in either Chatter > Files or the Notes and Attachments section of a Salesforce object, such as Account or Opportunity.

Files that are already kept within Salesforce are identified as such and there are no options for where the file is checked in and what filename it will have.

If a file is checked in without changing the name, it will overwrite the existing file and create a new revision of it. If the name is changed, then it will create a new file in Salesforce.


To check-in a new file

Prerequisites

- The file must not exist in Salesforce.
- The file cannot have been 'Saved as' from an already existing file.

Steps

1. Click **Check-in** from the **X-Author Chatter** ribbon.
2. Select **Check-In to My Files** and go to the next step or select **Check-In to Object** and go to step 4.
3. Enter a filename, add comments and click **OK** and go to step 7.
This uploads the file to your **Chatter > Files**.
4. Select the object and then select **Files** if you want to upload the file to the object's Chatter feed. It will be stored as a **Feed Attachment** file in the Notes and Attachments section of the object.
- or -
Select Attachments to upload it to the **Notes and Attachments** section.

5. Enter a name or partial name for the object record and click . To configure the fields available for search filters, refer to [Configuring Search Criteria](#).
6. Click **Additional Fields** button to capture additional information about the file. To enable Additional Fields, refer to [Configuring Additional Values](#).
7. Select the relationship to see a list of Salesforce records. Update the record details.
8. Click **OK**.
9. Click **Select** beside the object you want to upload the file to.
10. Click **OK**, in the confirmation dialog, which indicates the version of the file.

Results

The new version of the file is in Salesforce.

To check-in an existing file

Prerequisites

There must already be a version of the file in Salesforce.

Steps

1. Click **Check-in** from the X-Author Chatter ribbon.
2. Enter comments in the What changed field and click **OK**.
The filename cannot be changed, ensuring you are checking in a new revision of the existing file.
3. Click **OK**, in the confirmation dialog, which indicates the version of the file

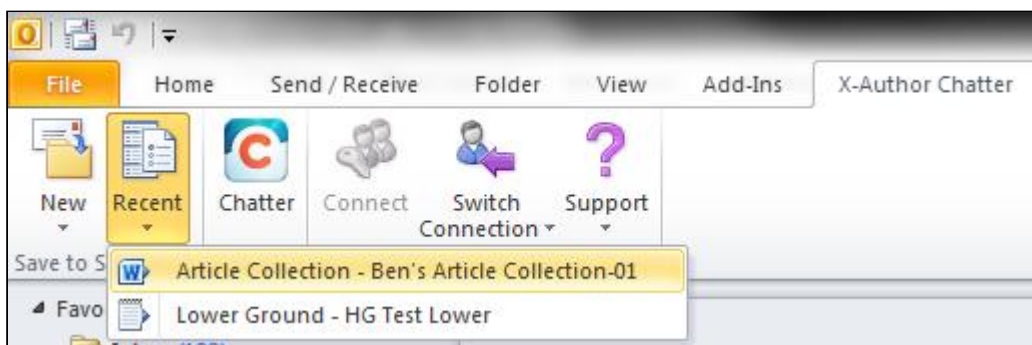
Result

The new version of the file is in Salesforce.

Recent Files

This enables you to quickly return to files you recently worked with, such as uploaded files via the Chatter feed or recently opened files when you are using X-Author Chatter in Outlook.

The menu option works like a typical recent files/recent items list you would have in Word or in Salesforce. The fifteen most recent files you have used are listed in order of most recent to oldest. Once you exceed fifteen, the oldest file gets bumped from the list and replaced with the most recent file.



In the list, the file type is indicated by the icon. The name of the object type and specific object that file is associated with is included in the list.

i The most recent files are associated with a specific logged-in user. You can log in to your Salesforce org from multiple machines, with X-Author Chatter installed, and the same recent items list is displayed.

Configuring Additional Values

You can capture additional information for an object during the check-in process by configuring Additional Values to be displayed during the check-in process.

To enable Additional Values:

1. For an object, create a fieldset in your Salesforce Org. For example, to configure Additional Values for Account object, you need to create a fieldset on the Account object.
2. To create a fieldset, navigate to your Salesforce object and click Field Set from the right-hand side setup menu.

Enter the following values for the Field Set Label and Field Set Name:


Field	Value
Field Set Label	ChatterAdditionalValueFieldSet
Field Set Name	ChatterAdditionalValueFieldSet


3. Click Save.
4. Drag and drop your required fields in the fieldset area.
5. Click Save.
6. Navigate to [X-Author System Properties](#).
7. Set **Additional Value Check** as *true*.
8. In the field **Additional Object Value API Name**, enter the API of the Salesforce object that you want to enable for Additional Values.
9. Click Save.

During the check-in process, an Additional Value button is now available.

Using Additional Values functionality

1. Click on Additional Value button to update data of the Salesforce object. For example, if you have set Additional Object Value API Name as Opportunity, you can now update the data fields of the opportunity record. All the data updates that you make are reflected in your Salesforce Org.
2. Click Save.
3. On the check-in page, Click Select.

 You can update the data only for existing records of the Salesforce object. If there is no record of the Salesforce object, X-Author Chatter displays an error.

 Additional Values functionality is not supported for Files object.

Configuring System Properties

You can drive the functioning of certain features in the application from the fields available in X-Author System Properties.

From **Setup**, enter **Custom Settings** in the *Quick Find* box and search for X-Author System Properties. Then select **X-Author System Properties** and click **Manage** to see **System properties**. **Edit System Properties** to provide value for the fields.

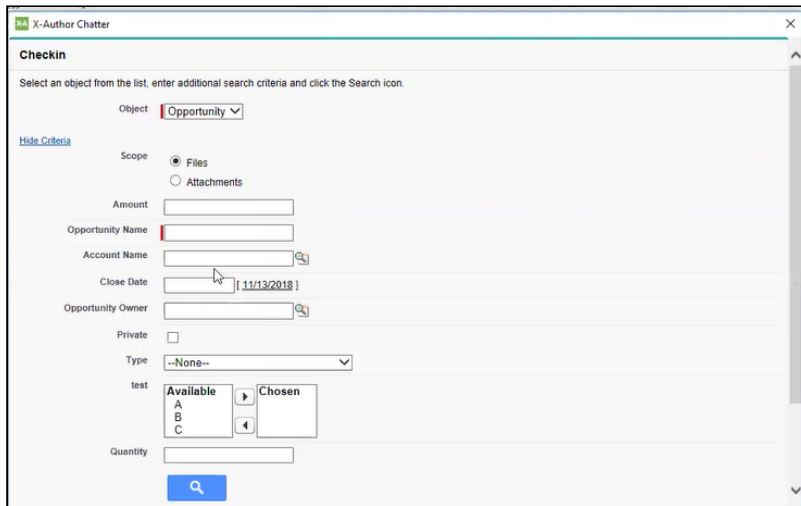
 You must name the System Properties record as **System Properties**.

The following table lists the fields available for edit and their significance.

Field	Description
Destination URL	Enter the Chatter Host URL. For example, https://xauthor.cloudapp.net/XAChatterOnline/
Icon Deselected	Enter the name of the chatter image in .png format. It shows the icon image as deselected in the task pane when you click other button groups or people. i.e chatterUnSelected.png
Icon Selected	Enter the name of the chatter image in .png format. It shows the icon image as selected in the task pane when you click other button groups or people. i.e chatterSelected.png
Max Recent Items	Enter the number of items to keep to keep in the recent items list. The default value is 10 items.
Static Resource Name	Enter the name of the uploaded static resource
Translate Service App ID	Enter the Translate Service Application ID
Additional Value Check	Select this field to enable Additional Values during the check-in process
Additional Value Object API Name	Enter the API name of the object to enable for Additional Values

Configuring Search Criteria

You can configure additional fields to be available for search functionality during the check-in and check-out process.



To configure Search Criteria,

1. For an object, create a fieldset in your Salesforce Org. For example, to configure search criteria for Account object, you need to create a fieldset on the Account object.
2. To create a fieldset, navigate to your Salesforce object and click Field Set from the right-hand side setup menu.

Enter the following values for the Field Set Label and Field Set Name:

Field	Value
Field Set Label	ChatterSearchCriteriaFieldSet
Field Set Name	ChatterSearchCriteriaFieldSet

3. Click Save.
4. Drag and drop your required fields in the fieldset area.
5. Click Save.

The fields are now available as part of the search criteria during the check-in and check-out process,

⚠ Configuring Search Criteria functionality does not support the following data types of Salesforce fields:

- Rich Text Area
- Phone

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