



---

## **Contract Management February 2017 Release Notes**

15 March, 2017



# Table of Contents

<b>About Release Notes</b>	<b>4</b>
<b>Packages</b>	<b>5</b>
<b>Data Model Changes</b>	<b>6</b>
<b>Feature Summary</b>	<b>7</b>
<b>Enhancement to Agreement Explorer</b>	<b>7</b>
Get Started	7
<b>Hide Smart Boundaries for 3rd Party Users</b>	<b>7</b>
Get Started	8
<b>Template Support for Custom Object Generation</b>	<b>8</b>
Get Started	9
<b>Enhancement to Template Versioning</b>	<b>9</b>
Get Started	9
<b>Resolved Issues</b>	<b>10</b>
<b>Known Issues</b>	<b>13</b>

# About Release Notes

Apttus Release Notes contain the following information about this release:

- [Packages](#) that are required to upgrade to this release
- [Data Model Changes](#) from the previous major 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](#)



This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

# Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate pre-requisites per feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Minimum Version	Latest Certified Version
Aptus Contract Management <b>(New)</b>	8.7.0368 (8.368)	8.7.0368 (8.368)

## Data Model Changes

The following table lists the data model changes from the August 2016 SP1 release to February 2017 release.

Object	Fields	Description	State	Feature	System/ User
Template Version		An object to hold various versions of a template and is a Master-detail to Template		Updated Template Version object to include parent version field	
	Parent Version	Represents version of the parent template from which the current template is cloned or copied.	New		System

# Feature Summary

The following features are new to Contract Management in this release:

- [Enhancement to Agreement Explorer](#)
- [Hide Smart Boundaries for 3rd Party Users](#)
- [Template Support for Custom Object Generation](#)
- [Enhancement to Template Versioning](#)

## Enhancement to Agreement Explorer

Agreement Explorer has been enhanced to allow users to create Agreement Explorer reports to display a larger number of Account and Agreement records, and to also display complex relationships in Agreement and Account Hierarchy reports.

The Account Lookup window in the Agreement Explorer now lets the user sort the accounts in the alphabetical order, in addition to displaying the accounts in the hierarchical list.

### Get Started

For more information on Agreement Explorer enhancement, refer to *To run the default Agreement by Account(s) report for one or more Accounts* topic in [Running Agreement Hierarchy by Account \(s\) Reports](#) in the *Contract Management February 2017 User Guide*.

For more information on Editing Report Settings in Agreement Explorer, refer to [Changing Report Type](#) topic in [Editing Report Settings](#) in *Contract Management February 2017 User Guide*.

## Hide Smart Boundaries for 3rd Party Users

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

## Release Notes

- 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](#) in the *X-Author Contracts February 2017 User Guide*.

For a description of the Comply System Property introduced in this release, refer to [Comply System Properties](#) in the Appendix of the *Contract Management February 2017 Administrator Guide*.

## Template Support for Custom Object Generation

This release provides an enhancement for generating templates on a custom object. The following fixes are included:

- Support has been added for the **Event** object. Fields from the Event object can now be used in templates.
- The new Admin Property, **APTS\_NoNameFieldObjects** has been added to permit fields from Objects with no Name field to be used in templates.
- The new Admin Property, **APTS\_NoISOCurrencyFieldObjects** has been added to permit fields from objects with no CurrencyISOCODE field to be used in templates. This Admin Property is only required for templates in *multi-currency orgs*.

Admin Property Name	Value	Code	Purpose
APTS_NoNameFieldObjects	XML	<Object API Name>	Use this property to add support for custom object generation for objects that do not have a Name field (e.g., "EventRelation," "Task," "TaskRelation"). Separate Object names using a comma or new line.



Admin Property Name	Value	Code	Purpose
APTS_NoISOCurrencyFieldObjects	XML	<Object API Name>	Use this property to add support for custom object generation for objects that do not have a CurrencyIsoCode field (e.g., "EventRelation," "Task," "TaskRelation"). Separate Object names using a comma or new line. This property is only applicable to templates in <i>multi-currency orgs</i> .

## Get Started

For a description of the admin objects introduced in this release, refer to [Admin Objects](#) in the Appendix of the *Contract Management February 2017 Administrator Guide*.

## Enhancement to Template Versioning

Template Versioning has been enhanced to allow users to store multiple versions of a template under the same template record and to view the parent version of a current template version. When a user clones a template from X-Author Contracts, they can view the parent version of the template from which the current template version was cloned or copied. It also allows the administrator user to select a template version from the **Versions** related list on the template record page and activate that version. The user can also activate a particular version from the latest X-Author for Contracts (version 9.0306) by checking out the desired template version and activating it.

## Get Started

For more information on template versioning, refer to [Viewing Parent Template Version](#) in [Cloning Template Versions](#) topic in the *Contract Management February 2017 Administrator Guide*.

## Resolved Issues

The following table represents resolved issues on the release dated: March 15, 2017.

Case Number	Description	Apttus Internal Case Number
187169	For 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. Now, the <b>Versions</b> related list in the template details page shows the parent version of the current template version.	CLM-1891
188139	When a user attempted to generate a supporting document using Document Assembly functionality for an agreement which has been checked in with Redlines, then the generated PDF failed to preserve the redlines. This issue has been resolved.	CLM-1942
194668	When trying to create new wizard design from Wizard Design tab, user received an error saying "Collection size 1,070 exceeds maximum size of 1,000." This issue has been resolved.	CLM-2126
195600	When creating an agreement, on making a call to MergeService(Apttus.MergeWebService.generateDoc2()), the call failed due to null pointer exception. This issue has been resolved.	CLM-2164
200971	When submitting a wizard with validation rule errors, the wizard hung up with endless spinning wheel and the validation errors were not shown. This issue has been resolved.	CLM-2248


Case Number	Description	Apttus Internal Case Number
201286	When setting agreement explorer reports to view parent child agreement hierarchy, the report did not display any data. This issue has been resolved. Agreement Explorer now shows agreement hierarchy reports with parent child hierarchy. To learn more about the Agreement Explorer enhancement, refer to feature summary <a href="#">above</a> .	CLM-2295
202495	When trying to lookup an account by entering the account name in Agreement by Account search field in the agreement explorer tab, the lookup failed to return the account even though the account existed. This issue has been resolved. Agreement Explorer now shows account name in Agreement by Account search results.  To learn more about the Agreement Explorer enhancement, refer to feature summary <a href="#">above</a> .	CLM-2361
203815	When a user closed the wizard without going to the next page then the changes made to the wizard were lost. This issue has been resolved. To learn more about the Save functionality in Agreement Wizards, refer to <a href="#">Running Wizards</a> in <i>Contract Management February 2017 Administrator Guide</i> .	CLM-2409
203827	When trying to use wizard data source callback for defaulting answers, if the field used for defaulting one answer had invalid value then the default was failed for all the answers. This issue has been resolved.	CLM-2411
204199	When searching an agreement in Agreement Lookup field in Agreement Explorer for searching agreement hierarchies, the lookup failed to return agreement records for agreement hierarchies. This issue has been resolved.  To learn more about the Agreement Explorer enhancement, refer to feature summary <a href="#">above</a> .	CLM-2433

Release Notes

Case Number	Description	Apttus Internal Case Number
204329	When trying to add an email address in the <b>Additional To</b> field in agreement, if the email address had an apostrophe the user got an error "Invalid email address found. Kindly verify and provide valid email address separated by:". This issue has been resolved. The email validation is now updated to accommodate apostrophe as a valid character in the email address.	CLM-2434
202192	Clicking on Agreement Hierarchy or Agreement hierarchy by Account button in Agreement Explorer caused Visualforce View State Error. This issue has been resolved.	CLM-2441
	When generating a document from an agreement template that contained a field from the EventRelation object, the error "No such column 'Name' on entity 'Event'" was displayed and the document failed to generate. This issue has been resolved. APTS_NoNameFieldObjects is now available to configure additional Objects with no Name field.	CLM-2460
	When a customer installed X-Author for Contracts, it showed up as an unmanaged 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 along with the Contracts Management managed package in Salesforce.	CLM-2513

# Known Issues

The following table represents known issues on the release dated: March 15, 2017.

Apttus Internal ID	Issue
<b>Contract Management- 8.368</b>	
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.
CLM-2462	<p>On Agreement Document Output Format page, when a user tries to make changes to any record for deselecting 'Allow Override (Watermark)' checkbox, the records are not saved.</p> <div data-bbox="337 1108 1458 1577" style="border: 1px solid #f9e79f; padding: 10px;"> <p> Users may experience regression issues while generating documents, on the records that satisfied a few combinations of preferences saved in Setup Agreement Document Output Formats. Observed issues are as follows:</p> <ul style="list-style-type: none"> <li>• On agreement generation, system does not display output format values for the user to choose from;</li> <li>• Output format values are displayed with no option pre-selected, and user gets null pointer exception on generate action, or;</li> <li>• Document is generated with the file extension .prompt</li> </ul> </div>
CLM-2558	If include Include Watermark and Allow Override options are both set to true at record level then the effect doesn't work on template selection page on Generate action.
CLM-2559	Include Watermark option is not working, even when its value is set to true, for any option in the Setup Agreement Document Output Formats Page.

Release Notes

Apttus Internal ID	Issue
CLM-2440	After an agreement document is sent for review, the activity history does not record details for any of the attachments.
CLM-2249	On adding text in the comments box associated with the Attachments and Comments section, the user gets an error or the Wizard hangs.
<b>Contract Management- 8.359</b>	
CLM-2416	Entries on the Master Agreement Clauses listing are showing an incorrect time stamp.
CLM-2419	When a user attempts to edit a step input rule using the Wizard Designer, an error is thrown, preventing the user from editing the rule.
<b>Contract Management- 8.354</b>	
CLM-2296	During Send for Review, if a user has Internet Explorer, email template contents displayed in the scrolling window on the Edit Email page do not show enough of the template to provide an adequate preview.
CLM-2300	The red line denoting a field is required in Wizard runtime is exceeding the height of the input boundaries for all Agreement object fields.
CLM-2301	When entering text into a comments field in Wizard runtime, the field loses focus, forcing the user to click inside the boundary of the comments field a second time to complete the task.
CLM-2317	After entering text into a field, clicking to the next field loses focus, forcing the users to click inside the boundary of the comments field for a second time to complete the task. Current workaround is to use the tab key to move to the next field.

Apttus Internal ID	Issue
CLM-2319	When a user the type ahead search feature in the Wizard Component Library, text is sometimes being deleted as it is being typed.

### **Apttus Copyright Disclaimer**

Copyright © 2017 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.

## Release Notes

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://apptusportal.force.com/community>.