



X-Author for Contracts 2.0 on Salesforce

Summer 2020 Release Notes



Table of Contents

- About Release Notes 3
- Packages..... 4
- System Requirements and Supported Platforms 5
- New Features..... 6
 - Windows OS Certification.....6
 - Support for Centralized Deployment.....6
 - Intelligent Import..... 7
 - Template Versioning..... 7
 - Support for Read-Only Clauses..... 7
 - Ability to make Columns and Rows Conditional in a Table.....8
- Enhancements..... 9
 - Introduced new fields in Create New Template.....9
 - Updates to Playbook.....9
 - Updates to Promoting Clauses to Playbook..... 10
- Resolved Issues11
- Known Issues12
- Apttus Copyright Disclaimer 16

About Release Notes

Apttus Release Notes contain the following information about X-Author for Contracts 2.0 Summer 2020 Release on Salesforce.

For more information on new features, enhancements, and document improvements refer to [What's new](#) in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*


- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [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

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Packages

The following Apttus X-Author for Contracts 2.0 package is automatically upgraded to the latest release without any intervention. Apttus Contract Management (dependent package) is required to be upgraded to 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 for Contracts (New)	2002
Conga Contract Lifecycle Management (New)	11.1.0547 11.547

 Before installing or upgrading Apttus managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Packages Dependency Matrix](#). New customers must reach out to Apttus Release Management to access X-Author for Contracts 2.0 Release.


System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using X-Author for Contracts 2.0 on the Windows operating system.

System Requirement	Minimum Supported Version
Windows Operating System	Windows 10
Microsoft Office	Office 365 versions up to 16.0.11629 version

The following table lists the minimum requirements for installing and using X-Author for Contracts 2.0 on the Mac operating system.

System Requirement	Minimum Supported Version
Mac Operating System	macOS Mojave (version 10.14.5)
Microsoft Office	Microsoft Office version 16.34 or higher

 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 Office versions are also still supported by Microsoft. As Microsoft ends its own support for any Office version, subsequent new Apttus release will no longer be developed, tested, or committed to support the application, on that version.

New Features

The following features are new to X-Author for Contracts 2.0 in this release.

- [Windows OS Certification](#)
- [Support for Centralized Deployment](#)
- [Intelligent Import](#)
- [Template Versioning](#)
- [Support for Read-Only Clauses](#)
- [Ability to make Columns and Rows Conditional in a Table](#)

Windows OS Certification

X-Author for Contracts 2.0 is now certified for Windows operating system. All features of X-Author for Contracts 2.0 are supported for Windows operating system.

Get Started

For details on system requirements and supported platform for the Windows operating system, refer to [System Requirements and Supported Platforms](#).

Support for Centralized Deployment

This feature allows Office 365 administrator to install the X-Author for Contracts 2.0 add-in using centralized deployment via the Office 365 admin center. The Office 365 administrator can deploy the X-Author for Contracts 2.0 add-in and assign the add-in directly to a user, to multiple users via a group, or to everyone in their organization.

After the X-Author for Contracts 2.0 add-in is deployed by the Office 365 administrator, any user with add-in installation privileges can directly insert add-in in their Microsoft Word.

Get Started

For details on installing X-Author for Contracts 2.0 using centralized deployment, refer to [Installing Production X-Author for Contracts 2.0](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Intelligent Import

You can use the Intelligent Import feature to scan and automatically extract key data from third-party contract documents. Intelligent Import recognizes and maps important metadata and clauses from the third-party contract document to Contract Management.

After the Intelligent Import has performed the data extraction successfully, you can review the import result. You can see the fields and clauses recognized from the document in X-Author Contracts. You can also mark or unmark the fields or clauses in the document.

Get Started

For details on Intelligent Import, refer to [Intelligent Import](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Template Versioning

Template Versioning provides a solution framework of document versioning at the template level to track template versions against generated documents. You can use template versioning to track and manage every version of your template throughout its lifecycle. You can activate any specific version of a template and observe how the template looked at every stage in the authoring process. You can perform the following actions when template versioning is enabled in your org:

- Create new template versions
- Open template versions
- Lock and unlock template versions
- Check-in template versions
- Clone template versions

Get Started

For details on Template Versioning, refer to [Template Versioning](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Support for Read-Only Clauses

You can now make clauses read-only to prevent users from editing the clause content. When you enable the read-only attribute for a clause in a template, that clause becomes uneditable in the generated document.

Get Started

For details on how to mark a clause read-only, refer to [Marking Clauses Read-Only in a Template](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Ability to make Columns and Rows Conditional in a Table

This feature allows you to make any or all of the rows and columns in a table as conditional. While creating a template, you can define various condition expressions on rows and columns of a table. These condition expressions are evaluated to include or exclude the rows and columns.

Get Started

For details on how to make columns and rows conditional in a table, refer to [Making Columns and Rows Conditional in a Table](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Enhancements

The following enhancements are new to X-Author for Contracts 2.0 in this release.

- [Introduced new fields in Create New Template](#)
- [Updates to Playbook](#)
- [Updates to Promoting Clauses to Playbook](#)

Introduced new fields in Create New Template

In this release, the following fields are introduced in the create new template pane:

- Name
- Agreement Type
- Category
- Subcategory
- Language
- Keywords
- Next Revision Date
- Description
- Guidance

Get Started

For details on how to create a template, refer to [Creating New Templates](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Updates to Playbook

You can access the non-versioned clause templates from Playbook after Template Versioning is enabled in your org. The system automatically assigns the existing non-versioned clause templates as version 1.00 when you perform the following actions:

- Select the clause template
- Mark
- Insert
- Insert Smart

Get Started

For details on how to use Playbook, refer to [Using Playbook](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Updates to Promoting Clauses to Playbook

When Template Versioning is enabled and you promote a clause to Playbook, the system automatically creates an active version of the clause template.

Get Started

For details on how to promote clauses to Playbook, refer to [Promoting Clauses to Playbook](#), in *X-Author for Contracts 2.0 on Salesforce Summer 2020 User Guide*.

Resolved Issues

The following table lists the issue resolved in this release.

Case Number	Apttus Internal ID	Description
00099110	XAJS-3756	When a user generated an agreement document using special characters in the agreement name, the user encountered an error while checking in the document.

The following table lists the issues resolved from the previous releases.

Apttus Internal ID	Description
XAJS-4100	When Conditional Segment in the template had Less Than and Not Equal To operator for the date field, the field-level validation failed.
XAJS-3411	The X-Author Contracts ribbon was not available on the Home tab after closing and reopening Microsoft Word.
XAJS-3036	When a user added a style segment to a clause, the complete clause was displayed as a style segment along with the selected text from the clause.
XAJS-3035	The generated agreement document did not inherit segment styles from the template for marked clauses.
XAJS-2558	<p>The Make Conditional popup for Set Segment stopped responding after adding the 10th row.</p> <p>Resolution: You can only add up to 9 rows in Make Conditional popup. A warning message is displayed after adding the 10th row.</p>

Known Issues

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

Apttus Internal ID	Description
XAJIS-3483	When you insert a clause in a template that contains a Microsoft Word table with style segment, the check-in of template takes more than 90 seconds.
XAJIS-2543	On clicking Highlight option, the smart and read-only fields are highlighted thrice. This happens when you apply Insert Comments and Track Changes protection while generating a document.
XAJIS-2365	<p>The formatting of the bulleted list is not proper when you perform the following actions:</p> <ul style="list-style-type: none"> • Make a segment that contains a bulleted list conditional in a template. • Mark clause to a block of text that contains a bulleted list in the template or agreement document. • Insert a clause that contains a bulleted list in the template or agreement document.
XAJIS-3386	On performing Update from CLM and Preview Reconcile, the Contract date format in Croatian is converted to an invalid date.
XAJIS-3367	XAJIS Template does not support fourth-level Reference fields.
XAJIS-3272	After deleting the locale from Contract Management, template name and locale are removed from the Check-in page.
XAJIS-3301	<p>When you generate an agreement using a non-localized template, a currency prefix symbol is added to the currency data type field.</p> <p>Workaround: Set APTS_DoNotPrefixCurrency admin entry to true while generating agreement documents.</p>

Apttus Internal ID	Description
XAJIS-3054	After inserting a smart clause in an agreement, the Conditional Segment within the clause does not appear as per the condition set for the clause.
XAJIS-3022	Incorrect values are displayed for smart fields after regenerating an agreement with a different template.
XAJIS-2941	The Compare pane stops responding on changing the value of a smart field in the Current document and comparing it.
XAJIS-2899	After creating a section and a third-level table and navigating to Update From CLM screen, the values of smart fields appear as changed even if there were no changes made to smart fields.
XAJIS-2885	The currency format for the reference lookup currency field is not displaying as per the record-level currency.
XAJIS-3061	After marking a clause containing Read-Only fields and navigating to the Update From CLM screen, few fields are displayed as modified.
XAJIS-2975	On validating doc fields after deleting smart and merge fields, an error is displayed.
XAJIS-2950	When you merge two versions of an agreement document generated with two different templates, you can view only revised version changes in the merged document.
XAJIS-2730	<p>The following culture-specific date formats are not supported:</p> <p>Thai</p> <ul style="list-style-type: none"> • ddd d MMMM yyyy (For example, ศ. 20 มกราคม 2560 is displayed for 20/1/2560). • 'วัน'dddd'ที่' d MMMM gg yyyy (For example, วันศุกร์ที่ 20 มกราคม พ.ศ. 2560 is displayed for 20/1/2560). • Thai dates use Buddhist year which is 543 years ahead. Hence, 2017 is displayed as 2560. <p>Greek</p> <ul style="list-style-type: none"> • el-gr ---- MMMM yyyy (For example, Μάιος 2017 is displayed for May 2017).

Apttus Internal ID	Description
XAJIS-2964	On clicking Reject changes, smart fields are appended with current values instead of replacing the value.
XAJIS-2931	When an Agreement Status Category or Status is restricted for check-in and check out, the restriction message does not appear for an offline agreement document. The offline document checks in successfully.
XAJIS-2468	The Check-in page does not respond after marking a clause with a managed smart field.
XAJIS-2516	Inserting a nested clause disorganizes the clauses on the Doc Clauses tab.
XAJIS-2700	A few built-in style segments do not apply in the generated document.
XAJIS-2769	The Select Styles window is not displaying custom styles.
XAJIS-2638	The loading time of the Preview Reconciliation window is more than 30 seconds on updating the content.
XAJIS-2640	Using the Hide Smart Boundary option displays the smart boundary on pressing Command+Z.
XAJIS-2426	<p>When you check out a document in the ICTC protection mode and mark existing smart fields as clauses and navigate to check in, the XAJIS pane stops responding.</p> <p>Workaround: After checking out a document, unprotect the document and make the necessary changes and check-in. This retains the ICTC mode.</p>
XAJIS-2703	If an agreement document has any read-only lookup fields in the repeat table under repeat section, the XAJIS pane stops responding on using the Update from CLM option.
XAJIS-2586	Navigating from one tab to another is taking longer in large documents.
XAJIS-2556	Updating a clause for the second time is not appearing in the Refresh Clauses tab.

Apttus Internal ID	Description
XAJIS-2385	On reconciling an agreement containing Date fields, the reconciliation screen shows all the Date fields as deleted.
XAJIS-2372	After checking in an agreement document containing Read Only fields, the X-Author pane stops responding.

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