



X-Author for Contracts June '22 Release


Notes



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In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the X-Author for Contracts June '22 release. For documentation updates, see [What's New in X-Author for Contracts Documentation](#).

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Packages

The following X-Author for Contracts package is automatically upgraded to the latest release without any intervention. Conga Contract Lifecycle Management (dependent package) is required to be upgraded to this release. Separate prerequisites for each feature can be found in the respective documentation. The packages marked as **(New)** are new in this release.

Product	Latest Certified Version (Version Name Version Number)
Conga Contract Lifecycle Management (Required if you are using Conga Contract Lifecycle Management)	13.0.669 13.669 <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> i The previous two (n-2) versions of Conga Contract Lifecycle Management are also supported. </div>
Conga CLM (Contracts for Salesforce) (Required if you are using Conga CLM (Contracts for Salesforce))	2.61

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see [System Requirements and Supported Platforms Matrix](#).

New Features

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

Protect and Unprotect Document

Using this feature, you can protect and unprotect an agreement document without entering the password. For more information, see [Locking and Unlocking Documents](#).

Replace an Alternate Clause with another Alternate Clause

Using this feature, you can view the list of alternate clauses available for an alternate clause and swap it. For more information, see [Viewing and Replacing Alternate Clauses](#).

Checking In Document using Update Current Version Option

Using this feature, you can save changes to a document without creating a new version of it. For more information, see [Checking in an Agreement Document](#).

Inserting Dynamic Segments

Using this feature you can use Dynamic Segments in your X-Author for Contracts templates to dynamically populate agreement documents with the content of clause templates and attachments based on Document Assembly Rulesets (DAR) defined in the connected Org. For more information, see [Inserting Dynamic Segments](#).

Enhancements

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

Ability to disable Auto Check Out option

This feature allows you to change the permission settings for any particular user profile. This permission setting disables the auto check out option (i.e., the agreement document will not open in a new instance) for the user when they perform the following actions:

- Create offline document
- check in offline document
- Send document for review
- Compare and merge document
- Regenerate/regenerate with redlines

For more information on how to disable the auto check out option, see [Assigning Custom Permissions to User Profiles](#).

Format Date Fields for Non-Localized Templates

This feature allows you to apply different formats for the date fields that are present in the non-localized template. For more information, see [Formatting Date Fields For Non-Localized Template](#)

Creating Nested Clauses

This feature allows you create a clause inside of another clause, and use the nested clause to generate an agreement document. For more information, see [Working with Nested Clauses](#).

Creating Nested Segments

This feature allows you to mark a segment inside of an existing segment. For more information, see [Setting Segments in Templates](#).

Inserting Clause with Formatting

This feature allows you to insert a clause and retain its original formatting. For more information, see [Using Clause Library for Template](#).

Viewing Complete Agreement Name

This feature allows you to view the complete agreement name by expanding the X-Author for Contracts window. For more information, see [Opening an Agreement Document](#).

Viewing Complete Clause Name

This feature allows you to view the complete clause name by expanding the X-Author for Contracts window. For more information, see [Using Clause Library](#).

Deleting Inserted Clause

This feature allows you to delete the smart clauses that you have inserted in the document before the final check in. For more information, see [Inserting and Deleting Clauses](#).

Changed Button Names for Setting Template Segments

The following button names have been changed in the Setting Segments pane:

- New Segment to Conditional
- Set Style to Style
- Insert Dynamic Segment to Dynamic.

Added a Filter to view both All Fields and Modified Fields

This feature allows you to use a drop-down menu that can help you to refine your search according to All Fields Type or Modified Fields. For more information, see [Doc Fields](#).

Added a Filter to view both All Clauses and Modified Clauses

This feature allows you to use a drop-down menu that can help you to refine your search according to All Clauses Type or Modified Clauses. For more information, see [Doc Clauses](#).

Remarking Extracted Clauses after Intelligent Discovery

After extracting data using Intelligent Discovery, you can use this feature to remark any incorrectly marked clauses. For more information, see [Reviewing Doc Clauses](#).

Remarking Extracted Clauses after Contract Intelligence for CLM

After extracting data using Contract Intelligence for CLM, you can use this feature to remark any incorrectly marked clauses. For more information, see [Reviewing Doc Clauses After Agreement Data Extraction](#).

Fixed Issues

The following table lists the issues fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00793525	XAJS-5704	When you insert a field in a template, the lookup field types are not available for inserting.
00789093	XAJS-5568	When you check in a template, X-Author for Contracts displays an error message.

Known Issues

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

Conga Internal ID	Description
XAJS-5619	When you are reviewing a document that was sent for external review using Office 365, and you edit the text or smart field in the first paragraph, an error message is displayed.
XAJS-5742	When you insert a clause(containing segments) without applying formatting inside a numbered or bulleted list of a template, there is a blank numbered or bulleted line inserted after the clause. Workaround: Delete the blank numbered or bulleted line manually.
XAJS-5150	When you refresh a clause that has a conditional segment, the conditional segment associated with the clause gets removed and only the clause remains. Workaround: Add a line break before the clause inside the segment, and then refresh the clause.
XAJS-5315	When you open an agreement document that contains read-only fields and press Delete to delete the field, the field is deleted in the latest Microsoft Word 16.54 version, however it is not deleted in Microsoft Word version 16.47.
XAJS-5256	When you check out an older version of an agreement document in pending approval status, the lock message is not displayed.
XAJS-5176	The Spanish date format dd MMM yyyy is populating the Date field differently in CLM and X-Author for Contracts.
XAJS-4982	If a template's name contains special characters, they are replaced with spaces. In Conga CLM, however, special characters are not replaced, and the template name is saved as-is.
XAJS-4531	When working with X-Author for Contracts for Conga CLM (Contracts for Salesforce), if you set a style for a segment that contains clauses or clause bundles, the selected style does not apply to the clauses or clause bundles in the agreement document.

Conga Internal ID	Description
XAJIS-2365	<p>The formatting of the bulleted list is not proper when you :</p> <ul style="list-style-type: none"> • Make a segment that contains a bulleted list conditional in a template. • Mark a 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	<p>The Update from CLM and Preview Reconcile actions convert the contract date to an invalid date format in Croatian.</p>
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 the APTS_DoNotPrefixCurrency admin entry to true while generating agreement documents.</p>
XAJIS-2941	<p>When you change the value of a smart field in a document and compare it, the compare pane stops responding.</p>
XAJIS-2899	<p>When you create a section and a third-level table, then navigate to the Update from CLM screen, the values of smart fields appear as changed even if there were no changes made to smart fields.</p>
XAJIS-2885	<p>The currency format for the reference lookup currency field is not displaying as per the record-level currency.</p>
XAJIS-2975	<p>On validating doc fields after deleting smart and merge fields, an error is displayed.</p>
XAJIS-2964	<p>When you click Reject Changes, current values are appended to smart fields instead of replacing them.</p>
XAJIS-2516	<p>Inserting a nested clause disorganizes the clauses on the Doc Clauses tab.</p>
XAJIS-2700	<p>Some built-in style segments do not apply in the generated document.</p>

Conga Internal ID	Description
XAJIS-2703	If an agreement document has any read-only lookup fields in the repeating table under the repeat section, the XAJIS pane stops responding using the Update from CLM option.

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