



**APTTUS**

## **CLM Usability Features**

# Agenda

- Apttus Administration
  - Dynamic Document Assembly
  - Comply System Properties
    - Capturing Merge events
    - Updating Header/Footer data
    - Submit Merge Call Action
    - Automating Final Document settings
  - Admin Tab
    - Cycle Time Reporting
    - Automating content search
  - Retention Policies



# Dynamic Document Assembly

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# Dynamic Document Assembly Process

1

- Gather field requirements

2

- Update Field Set

3

- Create Rule Set
  - Contains multiple Rules

4

- Create Rule
  - Contain Component(s)
  - Reference field combination(s)

5

- Create Component
  - Assigned clause

6

- Insert Rule Set in Agreement Template

**Doc Assembly Ruleset Detail** [Edit](#) [Delete](#) [Clone](#)

Ruleset Name DDA Owner [Ylani Roth](#) [\[Change\]](#)

Sequence 1 Description

Business Object Aptus\_\_APTS\_Agreement\_\_c

Record Types MSA

Active ☒

Created By [Ylani Roth](#), 6/8/2016 11:32 AM Last Modified By [Ylani Roth](#), 6/8/2016 11:32 AM

[Edit](#) [Delete](#) [Clone](#)

**Doc Assembly Rules** [New Doc Assembly Rule](#) [Doc Assembly Rules Help](#)

Action	Rule Name	Sequence	Description	Agreement Category	Active
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">EMEA Sales.MTA</a>	1		Sales	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">APAC Corporate.MSSA</a>	2		Corporate	<input checked="" type="checkbox"/>

**Doc Assembly Rule Detail** [Edit](#) [Delete](#) [Clone](#)

Rule Name APAC Corporate MSSA Ruleset [DDA](#)

Sequence 2

Description

Active ☒

**Filter By**

Agreement Category Corporate Agreement Subtype MSSA Region APAC

Created By [Ylani Roth](#), 6/8/2016 11:38 AM Last Modified By [Ylani Roth](#), 6/8/2016 11:38 AM

[Edit](#) [Delete](#) [Clone](#)

**Components** [New Doc Assembly Component](#) [Components Help](#)

Action	Component Id	Sequence	Type	Content
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AC-0000000000</a>	1	Terms and Conditions	<a href="#">APAC</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AC-0000000001</a>	2	Terms and Conditions	<a href="#">Corporate</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AC-0000000002</a>	3	Terms and Conditions	<a href="#">Master Sales and Service Agreement</a>

**Demo**





# Comply System Properties

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# Merge Events

- Any event using the Merge Server
- Captured on Related List
- More detailed information than Activity History

**Merge Event Detail**

EditDeleteClone

Event Name	Generate
Action	
Status	Completed
Result Document	00P36000000Ev8PEAS

▼ Merge Parameters

Agreement ?	<a href="#">MSA</a>
Custom Object ?	
Template	<a href="#">MSA FX2</a>
Document Format	PDF
Protection Level	Insert comments and tracked changes only
Is Draft	<input type="checkbox"/>
Created By	<a href="#">Ylani Roth</a> , 2/26/2016 4:23 PM

## Updating Header and Footer Data

- Update headers/footers of generated documents with
  - Agreement Number
  - Date/Time stamp
- Offline documents updated as well
- Many date/timestamp formats to choose from



## Enable Submit Merge Call

- Adds Submit button to the template selection screen
- Completes document generation asynchronously

**Options** | = Required Information

1. Select Output Format

☒ DOC ☐ DOCX ☐ RTF ☐ PDF

2. Include Watermark

☐

3. Select template from the list below and click Generate

Generate **Submit** Return

**Templates**



Select	Name	Guidance	Category	Subcategory
<input type="radio"/>	DDA test		Default	Default
<input checked="" type="radio"/>	MSA FX2		Default	Default

## Auto Enable PDF and Reconciliation for Final Documents

- Administrator can make these options mandatory for all docs
- Or set options to default but possible to override

**Check-In Document**  
Define the attributes to be applied in checking this document into Salesforce

**Options**  
\* Save: ☐ Update Current Version  
☐ With Redlines  
☐ Without Redlines  
☒ Final - to be signed

**Version Details**  
\* Suggested Name:   
☐ Watermark will not be included...  
 ☒ Reconcile Document  
 ☒ Create PDF attachment  
☐ Make this document private

**Demo**



# Admin Tab

## Admin Tab Cycle Time Reporting

- Provides quick way to determine length of time for agreement to go from one stage to another
  - Admin tab
  - Cycle Time Groups tab
  - Cycle Time Report

Agreement: Agreement Name	Account	From Value	To Value	Begin Datetime	End Datetime	Duration (Hours)	Cycle Time Group	Cycle Time Group Data: CT Group Data
<a href="#">MSA Copy Copy</a>	<a href="#">ABC Company</a>	Request	Activated	2/26/2016 4:51 PM	-	-	<a href="#">From Request to Activated</a>	<a href="#">CTGD-0000002</a>
<a href="#">MSA</a>	<a href="#">ABC Company</a>	Request	Activated	2/26/2016 4:51 PM	2/26/2016 4:54 PM	0.0500	<a href="#">From Request to Activated</a>	<a href="#">CTGD-0000000</a>
<a href="#">MSA Copy</a>	<a href="#">ABC Company</a>	Request	Activated	2/26/2016 4:51 PM	2/26/2016 4:55 PM	0.0700	<a href="#">From Request to Activated</a>	<a href="#">CTGD-0000001</a>

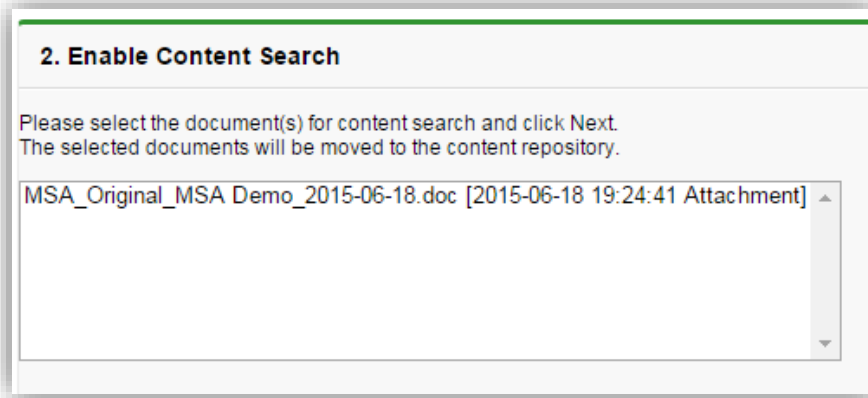
# AutoContent Searchable

- Simplifies Activation wizard (already in Org)
  - Automatically selects Signed doc as doc to be indexed for content search
  - If Chatter is enabled, will post in chatter feed; if disabled, will create document record in Documents Tab

Summary
Documents Selected for Activation
<ul style="list-style-type: none"><li>▪ MSA Copy Copy_Regenerated_DDA test_2016-02-26.pdf</li></ul>
Documents Selected for Content Search
<ul style="list-style-type: none"><li>▪ MSA Copy Copy_Regenerated_DDA test_2016-02-26.pdf</li></ul>

## AutoContent Searchable

- Skips this step



**2. Enable Content Search**

Please select the document(s) for content search and click Next.  
The selected documents will be moved to the content repository.

MSA\_Original\_MSA Demo\_2015-06-18.doc [2015-06-18 19:24:41 Attachment] ▲

▼

- Content Search auto selected = doc for activation



**Documents Selected for Activation**

- MSA\_Original\_MSA Demo\_2015-06-18.doc

**Documents Selected for Content Search**

- MSA\_Original\_MSA Demo\_2015-06-18.doc



**Demo**



# Retention Policy

# Retention Policies

- Determine the length of time a record must be stored
- Generally applied to all records sharing certain characteristics
- Characteristics include, but are not limited to, record type, region and owner

**Edit Policy Specification** Ok Cancel

**Filter**

Field	Operator	Value		
Record Type ▼	equal to ▼	MSA	AND	
--None-- ▼	--None-- ▼		AND	<a href="#">Del</a>
--None-- ▼	--None-- ▼		AND	<a href="#">Del</a>
--None-- ▼	--None-- ▼		AND	<a href="#">Del</a>
--None-- ▼	--None-- ▼			

[Advanced Options](#)

**Rule**

Retain Forever ☐

Period  Years ▼

After Date

**Demo**



## Get Apttus Certified

- 5 Day Course
- Register here: <http://apttus.com/university>



- To be “Apttus Product Certified” each person must *pass the exam* AND demonstrate proficiency through *completing the project* and *presenting a configured org.*



An aerial, high-angle photograph of a city skyline at night. The city is densely packed with skyscrapers and buildings, many of which are illuminated with lights. A prominent circular building is visible in the lower center. The image is overlaid with a semi-transparent blue rectangular band across the middle, which contains the text "Thanks for joining" in white. The background shows a mix of urban development and some open spaces, with a body of water visible in the distance.

**Thanks for joining**