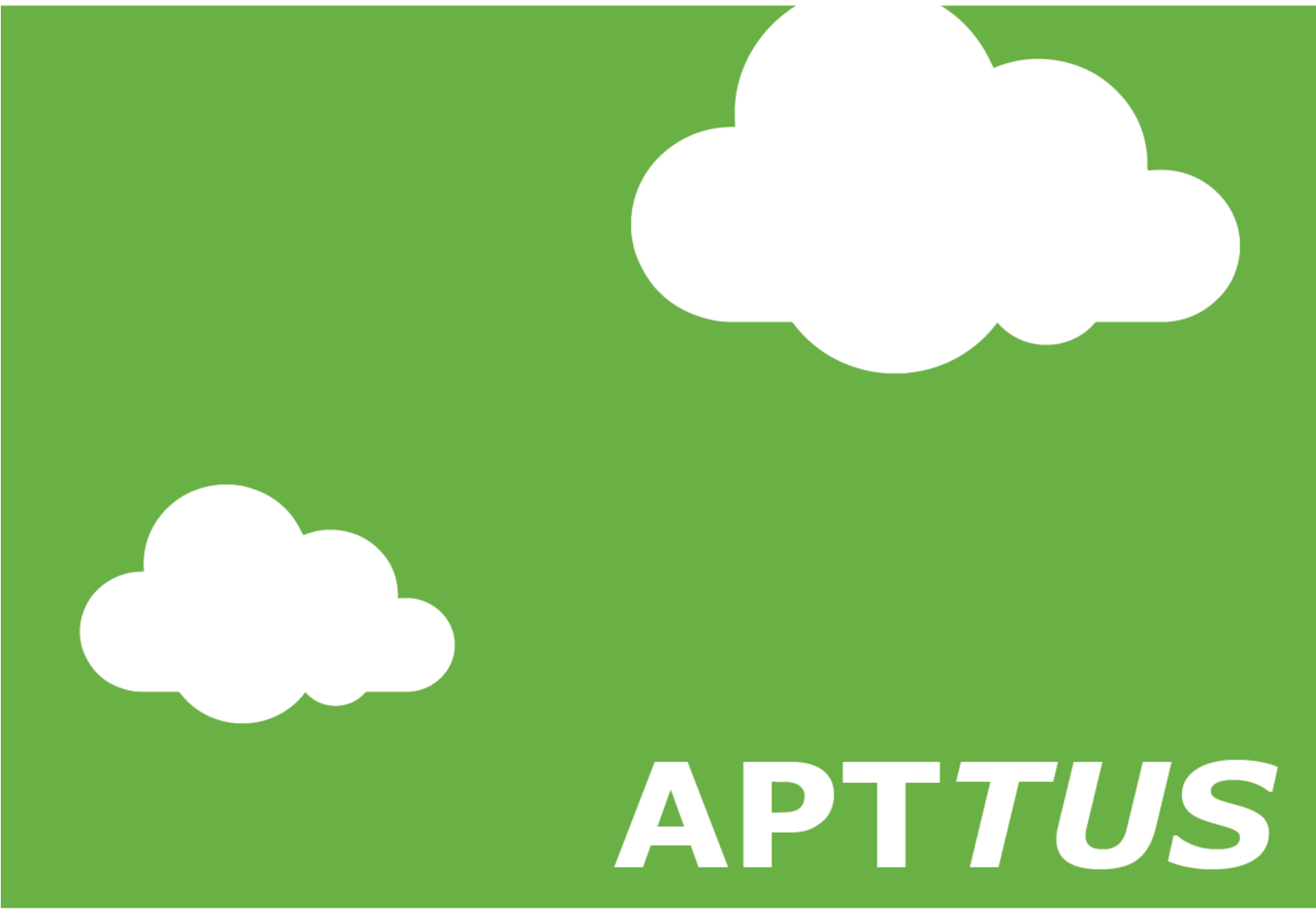
Contract Lifecycle Management
Usability Features
Student Guide



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Overview

Introduction

Apttus provides powerful, flexible tools that you can use to streamline your contract management. This guide will help you learn the concepts and tasks necessary to be a successful Apttus Contract Management Administrator.

Apttus Contract Lifecycle Management Administration training is a comprehensive learning experience covering all relevant aspects of implementation. This workbook presents a series of exercises that reinforce each topic. The specific details presented in this document may not be identical to your Salesforce org.

Prerequisite Knowledge

This course assumes that you have a basic understanding of the Salesforce environment and infrastructure as well as a valid Salesforce (SFDC) account with an Apttus CM license. Knowledge of relational database concepts can be helpful but is not required. To ensure success, the prerequisites for today's course are the CLM Basic Administration and Template Administration courses.

Objectives

- Generate highly customized documents using Dynamic Document Assembly
- A deeper look at the options within the Comply System Properties settings
- The implementation of many Admin tab settings within Contract Lifecycle Management
- Create a retention policy and schedule an Apex job to implement the policy

Terms & Definitions

The following are terms that will be used frequently throughout this course:

- **Organization/Org:** A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications, and is separate from all other organizations.
- **Objects:** A definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce (such as Contacts or Accounts), while others are specific to Apttus functionality (such as Templates or Agreements)
- **Records:** A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity.
- **Templates:** Blueprints used to generate a wide variety of document types when merged with data from quotes or proposals.
- **Agreements:** The set of terms and conditions agreed between two or more parties. An Apttus Agreement consists of structured Salesforce data and stored language dynamically generated into a static document.

Dynamic Document Assembly

Through preconfigured rules, Dynamic Document Assembly automatically inserts clauses to create a well-formed agreement document. The clauses are inserted based on values of agreement fields that you determine.

Filter rules are created in the Doc Assembly Rulesets tab. Apttus objects for rulesets, rules, and components all are maintained within Salesforce, separate from templates. Each ruleset can contain many rules and each rule can contain many components (clauses). The rulesets can be inserted into any template as Dynamic Sections. These Dynamic Sections in the template link to the associated ruleset, and thus to the prescribed content.

In the following exercises, we will configure these objects to create Document rulesets, rules and components. We will perform the roles of Template Administrator, End User and CLM Administrator as we create and configure Dynamic Document Assembly.

The values of the following fields on the Agreement object will determine which clauses the resulting document contains.

- Agreement Category
- Agreement Subtype
- Region

Exercise #1 Identify and set up the field(s) whose values drive document content

The Agreement Category field has already been created. Ensure that it contains all necessary values.

Step	Action
1	Click the **Setup** link to the right of your user name in the org.
2	Scroll down the left column menu and expand the **Create** link underneath the Build section.
3	Click on the **Objects** link. The Custom Objects page opens.
4	Click on the **Doc Assembly Rule** object link.
5	Click on the **Custom Fields & Relationships** link. Click on the **Agreement Category** field link.
6	Scroll to the Picklist Values section. Ensure that the values Sales, Procurement, Corporate and Other are available. If not, create the four values.
Result	The Agreement Category field can now be used to drive document content.

Exercise #2a Create New Fields on the Doc Assembly Rule Object

You will now create the Agreement Subtype and Region picklist fields on the Agreement Object.

Step	Action
1	Click the **Setup** link to the right of your user name in the org.
2	Scroll down the left column menu and expand the **Create** link underneath the Build section.
3	Click on the **Objects** link. The Custom Objects page opens.
4	Click on the **Doc Assembly Rule** object link.
5	Click on the **Custom Fields & Relationships** link. Click **New**.
6	Select the **Picklist** radio button and click **Next**.
7	Type **Agreement Subtype** in the Field Label box.
8	Select the **Enter Values for the picklist**… radio button.
9	Type in the following values separated by a line: MLA MTA MSSA
10	Ensure the Field Name reads **Agreement_Subtype**.
11	Click **Next** to continue.
12	Ensure the field is available for all profiles and click **Next**.
13	Click **Save**.
Result	The Agreement Subtype field will now be used to drive document content.

Exercise #2b Create New Fields on the Doc Assembly Object

Step	Action
1	Use the steps from the previous exercise and the values provided below to create the **Region** field on the Doc Assembly Rule Object. It must match exactly, what is on the Agreement Object.
2	Field Label: **Region** Field Name: **Region** Values (separated by a new line): Americas EMEA APAC
Result	The Region field will now be used to drive document content.

Exercise #3 Ensure Agreement Fields and Doc Assembly Rule Fields Match

The fields have been prepared, the next task is to ensure that the Document Assembly Rule fields match the Agreement Object fields.

Step	Action
1	Click the **Setup** link to the right of your user name in the org.
2	Scroll down the left column menu and expand the **Create** link underneath the Build section.
3	Click on the **Objects** link. The Custom Objects page opens.
4	Click on the **Doc Assembly Rule** object link.
5	Click on the **Custom Fields & Relationships** link.
6	In a new Tab repeat Steps 1-5, but this time for Step 4 click the **Agreement** Object.
7	Ensure the three fields (Agreement Category, Agreements Subtype, Region) are present on both the Doc Assembly Rule and Agreement Objects and that the **Field Labels and Names match**.
Result	The Doc Assembly Rule fields now match the Agreement Object fields.

Exercise #4 Add Fields to the Field Set

All fields being referenced must be added to a field set in order to work with Dynamic Document Assembly.

Step	Action
1	Click **Setup**
2	Scroll down the left column menu and expand the **Create** link underneath the Build section.
3	Click on the **Objects** link. The Custom Objects page opens.
4	Click on the **Doc Assembly Rule** object link.
5	Click on the **Field Sets** link.
6	Click **Edit** next to the **Doc Assembly Filter Fields.**
7	You now need to associate the new field with the field set. Drag the **Agreement Category, Agreement Subtype,** and **Region** field from the Doc Assembly Rule section and drop them into the "**In the Field Set**" box.
8	Click **Save**.
Result	The Doc Assembly Rule field set now references the Agreement Category field.

Exercise #5 Ensure Clauses are Present for DDA

The essence of Dynamic Document Assembly is its ability to insert the correct clause, or clauses, into a contract based on the particular value of a field, or combination of fields.

Before proceeding ensure that the all necessary clauses are present in your org.

Clauses:

1. Sales
2. Procurement
3. Corporate
4. Master Labor Agreement
5. Master Transaction Agreement
6. Master Sales and Service Agreement
7. Americas
8. EMEA
9. APAC

Step	Action
1	Click the **Templates** tab.
2	Select **Clauses** from the list view.
3	Ensure all clauses listed above are present.

Exercise #6 Update the Doc Assembly Ruleset Record Type

Step	Action
1	Click the **Setup** link to the right of your user name in the org.
2	Scroll down the left column menu and expand the **Create** link underneath the Build section.
3	Click on the **Objects** link. The Custom Objects page opens.
4	Click on the **Doc Assembly RuleSet** object link.
5	Click on the **Custom Fields & Relationships** link. Click on the **Record Types** field link.
6	Scroll to the **Picklist Values** section. Ensure that **MSA** is listed as a Picklist Value. If it isn't, add it by clicking on the New button and entering MSA. Save your work.
Result	MSA will now appear as a Record Type value in the Doc Assembly Ruleset tab.

Exercise #7 Create a Doc Assembly Ruleset

Step	Action
1	Add the **Doc Assembly Rulesets** tab to the Apttus Contract Management application if necessary.
2	Click the Doc Assembly Rulesets tab and click **New**
3	Name your ruleset by entering **DDA**-"your initials" into the Ruleset Name box.
4	Enter 1 for the **Sequence**.
5	Verify that the Agreement object API name appears as the business object.
6	Add the **MSA** record type to the right column of the Record Types setting.
7	Make sure your ruleset is **Active**.
8	Click **Save**.
Result	The DDA Rule Set container has been created. It references the Agreement object and the MSA record type.

Exercise #8 Create a Doc Assembly Rule

Step	Action
1	Within your new Agreement Category Doc Assembly Ruleset, click the **New Doc Assembly Rule** button.
2	Edit the layout, if necessary, so all fields are within the **Filter By** section.
3	We will create one rule for every level on the picklists. Each rule in turn will contain a component that specifies the clause to insert when the field values are selected. Enter **Level One** as the Rule Name.
4	Enter 1 for the **Sequence**.
5	Enter "Insert Sales, Americas, and Master Labor Agreement" into the **Description** field.
6	Make sure the rule is **Active**.
7	Select **Sales** from the Agreement Category picklist. Select **MLA** from the Agreement Subtype picklist. Select **Americas** from the Region picklist.
8	Click **Save & New** to repeat the process for: A) Rule Name: **Level Two** Sequence: **2** Agreement Category: **Procurement** Agreement Subtype: **MTA** Region: **EMEA** B) Rule Name: **Level Three** Sequence: **3** Agreement Category: **Corporate** Agreement Subtype: **MSSA** Region: **APAC**
Result	The Sales Doc Assembly Rules have been created. They are part of the DDA-"your initials" Doc Assembly Ruleset.

Exercise #9 Create a Doc Assembly Component

The Doc Assembly Component specifies which clause to insert based on the value of the rule. For each of the rules created in Exercise #8, you will insert the following components:

Rule: Level One
- Sales
- Master Labor Agreement
- Americas

Rule: Level Two
- Procurement
- Master Transaction Agreement
- EMEA

Rule: Level Three
- Corporate
- Master Sales and Service Agreement
- APAC

Step	Action
1	Return to the Doc Assembly Rule named Level One. Click the **New Doc Assembly Component** button.
2	Enter **1** for the Sequence.
3	Select **Terms and Conditions** from the Type picklist.
4	Search for and select your **Sales** clause in the Content field.
5	Save your work and repeat steps 1-4 to add the **Master Labor Agreement** (sequence 2) and **Americas** (sequence 3) clauses.
6	Use steps learned in this exercise to add the appropriate components to Doc Assembly Rule **Level Two** and **Level Three**. Appropriate components are listed above.
Result	You've created the Doc Assembly Component that specifies that the appropriate clauses will be dynamically inserted into the MSA template at document generation time. We will modify the MSA template momentarily.

Exercise #10 Update the Agreement category field

We will base the dynamic clause insertion on the value of the Agreement Category field.

Step	Action
1	Create an **MSA** agreement.
2	Select **Sales** as the value in the **Agreement Category** field. Select **MLA** as the value in the **Agreement Subtype** field. Select **Americas** from the **Region** field.
3	**Save** the agreement.
Result	Your agreement now meets the Dynamic Document Assembly criteria.

Exercise #11 Insert a Dynamic Section into your template.

Step	Action
1	Check out, the **MSA** template.
2	Scroll to an empty section of our template. Click on the **Insert Dynamic Segment** icon.
3	Type in **DDA Test** as the **Section Name**. Change the **Ruleset Name** to **DDA-"your Initials"**.
4	**Check in** your template.
5	Use the **Preview** functionality in an existing agreement to test these changes.
6	Try changing the field values in your MSA record to test the other clause insertions. Make sure to save your agreement prior to clicking on preview.
Result	You have successfully tested Dynamic Document Assembly.

Comply System Properties Exercises

The Comply System Properties are used to control the System Properties pertaining to the agreement or contract.
To access Comply System Properties, go to App Setup > Develop > Custom Settings > Comply System Properties > System Properties.

Exercise #12 Merge Events

As an admin, you can ensure that events (triggered by agreement action buttons) that use the Apttus merge server are published on the Agreement record, such as generating/regenerating a document or importing an offline document.

To implement this functionality, we will need to update a setting in **Comply System Properties**.

Step	Action
1	Click the **Setup** link to the right of your user name in the org.
2	Scroll down the left column menu and expand the **Develop** link underneath the Build section.
3	Click on the **Custom Settings** link. The Custom Settings page opens.
4	Click on **Manage** next to **Comply System Properties**.
5	Click on the **Edit** link for **System Properties**.
6	Enable the **Publish Merge Events** setting (by default, it is off). Click **Save**.
7	Click the **Agreements** tab.
8	In the Recent Agreements pane, click **New.**
9	Select **MSA** from the Record Type dropdown and click **Continue.**
10	Enter a name of your choosing in the **Agreement Name** field. The record type name will be defaulted into this field.
11	Click the magnifying glass icon next to the **Account** field and select an account of your choosing from the Lookup dialog window (e.g. ABC Company).
12	Enter an **Agreement Start Date**. Click **Continue**.
13	Review the field information on the Agreement edit page. Click **Save.**
14	In the Agreement record screen, click on the **Edit Layout** link to access the Page Layout Editor.
15	You will see a palette at the top of the screen and the page layout at the lower part of the screen. Click the **Related Lists** link on the left side of the palette, and drag the **Merge Events** rectangle to the Related Lists part of your Agreement page. A green horizontal line will indicate that you can drop the related list there. Click the **Save** button. Select **Yes** at the prompt.
16	The **Merge Events** related list will capture all document generation actions. To test this, generate a document from your agreement using the **Generate** or **Regenerate** buttons.
17	Return to the agreement record to see a Merge Event entry in the related list.
18	Now, create a new Word document with sample text in it (e.g. “This is an offline document.”), and save it locally on your computer. This is your offline document that you will now import into the agreement record.
19	Select the **Import Offline Document** button within the agreement record,
20	Choose the file you saved locally and attach the Word document file to import it to the agreement record. Click **Continue**.
21	Refer to the **Merge Events** related list. Verify that the **Generate** and **Import Offline Agreement** actions have been captured.
Result	Merge actions are captured in the Merge Events related list. Developers can now customize Apttus CLM by referring to the Merge Events object.

Exercise #13 Update Header and Footer data

Step	Action
1	Return to Comply System Properties and enable **Auto Insert Header Footer Data** (by default, it is off)**.** Save your work.
2	Return to your existing MSA agreement. Regenerate a document and open it. The Agreement Number is now marked with the Agreement Number in the right side of the header, while the Agreement Date and Time are located in the left side of the footer.
3	Return to **Comply System Properties**. Update the date and time stamp in the footer by entering any of the date/time formats from Appendix D into the **Footer Datetime Format for Imported Docs** setting. Select a format of your choosing, update the setting and save your work.
4	Return to your agreement and regenerate a document. Review your document to test the new setting.
5	Let's now apply header and footer information to an imported offline document. Create a test document in MS Word with some sample text and save it locally.
6	Return to Comply System Properties and fill in the **Agreement Number Field for Imported Doc** with **Apttus__FF_Agreement_Number__c** (copy and paste this text into the field).
7	Open your offline document in MSWord. Using X-Author, re-establish a connection from MS Word to your Salesforce org.
8	Click the Check-In icon from the **X-Author Contracts** ribbon.
9	When prompted with Yes/No radio buttons regarding FX2 format, leave it as **Yes** (chosen by default).
10	Select the **Upload/Import as an offline document** option as we will be attaching this document to your existing agreement. Do not make the document private.
11	Enter the name of your existing MSA agreement in the text area. Click the magnifying glass to search. Select your agreement. Your document will import.
12	Click OK after the document is imported. Notice that the header and footer data have been applied to the document.
Result	You have implemented automatic generation of header/footer data for both generated and offline documents, including the update of the Date/Time stamp used in the footer.

Exercise #14 Enable Submit Merge Call

If a template is sufficiently long and complicated, with many clause references and conditional statements, it may take a while to generate. The following exercise will enhance the user experience by freeing the end user to complete other tasks while the document generates.

Step	Action
1	Return to your agreement. Click the **Regenerate** action button and notice on the template selection screen that you have two buttons available, Generate and Return. Click the Return button as you don't need to generate a document.
2	Return to **Comply System Properties** to edit **System Properties**.
3	Turn on the **Enable Submit Merge Call** setting. Save your work.
4	Return to your agreement and click the **Regenerate** button. Notice that the **Submit** button is now available on the Template selection page.
5	After selecting your output format, protection and template options, click the **Submit** button.
6	A popup window appears with a message that the action is submitted for processing and not to log off until you receive a completion notification. Click on **OK**.
7	The system returns you automatically to your agreement record and allows the end user to continue other tasks while the document generates.
8	Return to your agreement. The AsyncMerge Calls related list has now populated as well.
Result	The end user experience when generating massive documents has been greatly improved.

Exercise #15 Auto Enable Reconciliation & PDF

The default behavior of X-Author when the end user checks in a document is to provide options for the user to reconcile and create a PDF version of the document. You may wish to take these decisions away from the end user to ensure that reconciliation *always* occurs upon check in and that a PDF version is *always* created during final check in.

Step	Action
1	Return to your agreement. Generate, or regenerate, a .doc or .docx file based on the MSA template. View the file.
2	Select the **Check-In** icon in the X-Author Contracts tab. (You may need to save the file locally first.)
3	Select **Final - to be signed** under **Options**. Notice the two available checkboxes, **Reconcile Document** and **Create PDF attachment**. Click **Cancel** as we do not need to check in the document as the final version.
4	Close MSWord or disconnect your X-Author session.
5	Return to Comply System Properties to edit System Properties.
6	Enable two settings in System Properties, **Auto Enable PDF For Final Docs** and **Auto Enable Reconciliation**.
7	Save your work.
8	Check out the document from the first step.
9	Select the **Check-In** icon.
10	Compare the **With Redlines**, **Without Redlines** and **Final – to be signed** options. Notice that the two options, **Reconcile Document** and **Create PDF attachment**, are enabled without permitting the user to de-select or override them when selecting the **Final – to be signed** option.
Result	All final versions of the document will automatically generate in PDF as well as Word format and will also go through the Reconcile process.

Comply System Properties provides two more options related to reconciliation and PDF Selection. The settings Allow PDF Selection Override and Allow Reconcile Selection Override reinstate the checkboxes for these options when checking in a document and the Auto Enable PDF and Reconciliation settings are enabled. However, override settings are off by default.

Admin Tab Exercises

Cycle Time Reporting

CLM provides organizations the ability to track the time that has elapsed between any two statuses or status categories. In these exercises, we will first implement the correct setting, then generate a report showing us how much time has passed between the initial request of an agreement to its going into effect. You could easily configure these settings to determine if your agreements are consistently slowing down at a particular stage of the contract lifecycle management process.

Note: Cycle Time Reporting only applies to agreement records created after cycle time reporting has been activated.

Ex. 16A Enable Cycle Time Reporting

Step	Action
1	Navigate to the **Admin** tab and click on **New Admin**.
2	Enter (or copy and paste) **APTS_CycleTimeReportingEnabled** into the **Name** field and **True** in the **Value** field.
3	Save your work.

Ex.16B Cycle Time Reporting Settings and Testing with an Agreement Record

Step	Action
1	Customize your Apttus Contract Management application by adding the **Cycle Time Groups** tab.
2	Click on **New** in the **Cycle Time Groups** tab.
3	Select the field **Status** from the picklist in the Select Field step. Click **Next**.
4	**Name** is a required field in the Edit Group Definition step. Enter **Request to Activated** for the name of the cycle time group.
5	Select **Request** for the **From** value and **Activated** as the **To** value.
6	Save your work and activate the Cycle Time Group.
7	Return to the Agreements tab. Create an agreement (must include an End Date) and take the agreement through the entire Contract Lifecycle Management process, from Status Category: Request and Status: **Request** to Status Category: In Effect and Status: **Activated**. IMPORTANT: Be sure to save each change in Status and Status Category. Allow at least one minute to elapse between **Request** and **In Effect**.

Ex. 16C Run Cycle Time Reporting

Step	Action
1	Navigate to the **Reports** tab and click on **New Report…**.
2	Expand the **Other Reports** category. Scroll through the picklist and click on **Show More...**. (You may need to click on Show More twice.) Select **Agreements with Cycle Time Group Data**.
3	Select **Create**.
4	In the Report Builder, the **Preview** of your new report will show the Agreement that you just guided through the Activation process. Notice the Agreement Name and the Cycle Time Group Data fields appearing as columns. If you do not see any records, check that the **Show** filter is set to All Agreements and the Date **Range** is set to All Time. Otherwise, check the agreement that you activated.
5	To make the report more useful, add some fields to the report by dragging-and-dropping the

	From Value, **To Value**, **Begin Datetime**, **End Datetime**, and **Duration (Hours) fields** from the Fields Pane on the left (under Cycle Time Group Data: Info) to the Preview Pane on the right. Rearrange the fields/columns of the report as desired.
6	To calculate the average duration (time it takes agreements to go from the Request to In Effect status categories), click on the down arrow that appears when you hover over the **Duration (Hours)** column heading and select **Summarize this Field…** Note that you can summarize by Sum, Average, Max, or Min. Select one and click **Apply**. You should now see the average duration at the bottom of the report. Optional: To see more records in your report, create a few more new agreements and take them from Request to In Effect. Run the Report again (Step #7) to see the new records.
7	Click **Run Report**.
8	To save your report, click **Save As**. Name your report **Time between Request and Activation**. Press Tab and the Report Unique Name (API name) will populate as well – DO NOT type the Report Unique Name.
9	Click **Save & Return to Report**. Click on any links in the Cycle Time Group Data column that appear in the report to drill into the specific agreement record.
Review	You have enabled your org to track the length of time it takes to complete agreements.

Auto Content Searchable

CLM's default behavior during activation is to provide a three-step wizard. The end user must select which attachment is the final version, which file(s) should be indexed for content search and which draft documents may be deleted. It is likely for most organizations that the final version of the document is also the version that should be searchable. To automate this step, and to reduce the wizard to a two-step process, complete the exercise below.

Exercise #17

Step	Action
1	Return to an existing agreement. If necessary, generate a document, and update the **Status Category** and **Status** fields to **In Signatures** and **Fully Signed**, respectively. Begin the activation process by clicking the **Activate** action button. Go through the three steps in the activation wizard before cancelling. Notice that a document must be manually selected for content search.
2	Navigate to the Admin tab and click on **New**.
3	Enter (or copy and paste) APTS_AutoContentSearchable in the **Name** field and **True** in the **Values** field.
4	Save your work.
5	Repeat Step 1 of this exercise and notice that the document you selected during activation is now automatically selected to be indexed for Content Search.
Result	The Activation wizard automates the content search document selection process.

Retention Policies

Exercise #18 Create a Retention Policy

A retention policy determines the length of time a record must be stored. Generally, organizations will apply retention policies to all records sharing certain characteristics. These characteristics can include, but are not limited to, record type, region and owner.

Step	Action
1	Customize the **Apttus Contract Management** application by adding the **Retention Policies** tab.
2	Select **New** to create a new Retention Policy.
3	Name your policy RetPol-<your initials>. Enter 1 in the Sequence field.
4	Ensure that your policy is active. Save your work.

Exercise #19 Define a Retention Policy

For this exercise, we will create a retention policy that retains MSA records for 7 years after their Agreement End Dates.

Step	Action
1	Click the **Edit Spec** action button in your new Retention Policy.
2	On the **Edit Policy Specification** screen, within the **Filter** section, select **Record Type** as the first field, **equal to** as the operator, and type **MSA** as the value.
3	Within the **Rule** section of the screen, set a period of 7 years. Select **Agreement End Date** from the picklist for the After Date field.
4	Click **OK**.
Review	You've created a retention policy and defined the policy filters.

Exercise #20 Calculate the Retention Date

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, selects applicable business objects using the filters, computes the retention date and updates the object.

An activity history record is written to the agreement with the policy information. The process terminates on two conditions: when there are no more business objects to process, or when all the policies have been applied. The process is scheduled using the RetentionDateCalcJobScheduler Apex scheduler class. Due to governor limits, each policy processes a maximum of 5000 records during each invocation.

Step	Action
1	Click **Setup** > **Develop** > **Apex Classes**, then click the **Schedule Apex** button.
2	Enter **Retention Calc Job-<your initials>** as the **Job Name**.
3	Select the Apex Class field and enter, or search for (using the Lookup icon) **RetentionDateCalcJobScheduler**
4	For the Schedule Apex Execution, set the **Frequency** for **weekly** and set the **recurrence** to today's day of the week.
5	The **Start** field is already set for today. Set the **End** field value to one year from today's date.
6	Set the **Preferred Start Time** to the closest upcoming hour to the current time.
7	Save your work.
Review	The Apex batch job is scheduled.

Exercise #21 Monitor the Scheduled Job

Step	Action
1	To see your list of pending jobs, click **Setup** > **Monitor** >**Jobs**> **Scheduled Jobs**
2	To see the status of specific jobs navigate to **Setup** > **Monitor** >**Jobs**> **Apex Jobs**
3	Assuming the job has not already run, you should see your **RetentionDateCalcJobScheduler** Apex job at the top of the list.
Review	The Apex job can now be monitored. Return to the **Apex Jobs** part of Setup after the scheduled runtime to see that the job has been completed.

Agreement Relationships

Functionality and Benefits

Relationships between Agreement records in Apttus CLM can take two forms:

1. Parent/Child relationship: Allows for agreements to have a structured hierarchy. A typical use case is a Master Service Agreement and its related SOW contracts.
2. Lookup relationship: Allows for two agreements to be linked to one another in a simple manner. Typical use cases are for Amendments or Renewals (the original agreement can be linked to the amended agreement).

Relationship Structures

Each related agreement record contains the following two important fields:

1. Relationship From
2. Relationship To

In case of amendments and renewals, the **Relationship From** is populated with the agreement which you have selected for amendment or renewal and the **Relationship To** is populated with the agreement created from these actions.

These relationships are not exclusive to renewal or amendment agreements, but are designed to ensure that all agreements are connected.

Parent/Child Agreements

A child agreement can be created from the Parent by using the Child Agreement related list. When created, the Parent record is listed on the page layout. The child agreement number stands alone and does not align to the parent record.

Post Activation Actions

Functionality and Benefits

Once an Agreement is activated, additional action buttons appear on the page layout. These actions allow users to manage their post-activation commitments. These actions include: Amend, Renew, Terminate and Expire.

Amend
The amend action creates a new Agreement record with decimal numbers appended to the original agreement number. For example, an amendment on agreement 10909 will create a new agreement record with agreement number 10909.1.

Data is copied over from the original agreement to the new agreement. Changes to the default data fields can be defined under Admin Settings under APTS_ComplyConfig entry.

The Agreement Status Category and Status changes as following:

- (Original) 10909.0: In Effect/Superseded
- (Amendment #1) 10909.1: In Effect/Being Amended
- (Amendment #2 in progress) 10909.2: Request/In Amendment

Renew
A renewal action performs the following in the system:

- A new related child Agreement record is created and related to the original agreement.
- Renewed is suffixed to the Agreement name
- The Agreement Start Date is set to 1 day past the end date of the original Agreement.

Terminate
When a user clicks on the Terminate button, the Agreement is terminated and the Agreement status category and status changes to Terminated/Terminated. This ends the Agreement lifecycle.

Expire
With the Expire button, an Admin can set up auto notification 180, 120, 90, 60, or 30 days in advance. The notification informs contract administrators that the Agreement is expiring. A Contract Admin will then open the agreement record and click the Expire button. The Agreement Status Category and Status will change to Expired/Expired.

Considerations

Each of these actions is recorded in the Status and Status Category fields on the Agreement record. Administrators can use workflow rules to provide timed notifications when action dates are approaching or to notify contract managers of past or expired commitments.

Appendix A: Document Management – Post Activation

Functionality and Capabilities

With standard configuration, all generated Agreement documents are visible in the Notes & Attachments related list for a given Agreement record.

When an Agreement is Activated, the Final version of the document can be sent to other repositories for search and retrieval. When using the Agreement content repositories, visibility on the Activated contract can be set to be different from the Agreement record itself.

The generated document (s) can be stored in one or more of the following repositories:

- In Salesforce Documents object via the Agreement Documents object
- As a File in the Chatter repository
- In Salesforce CRM Content
- In an external repository

Considerations

- Security and visibility needs influence which repository should be used when storing activated agreements.

- Search results are displayed by the type of repository and the results returned when searching by the Contract (File) name OR content within that Contract.

- All Salesforce profiles that need to search Agreement Documents will need access to the Documents tab. The Tab can be hidden for those who are granted permissions but do not need to see it.

- If the Chatter Files repository will be used, Chatter must be enabled for the org.

- If Salesforce Content will be used, the Apttus Content Integration package must be installed in the org, Content must be enabled for the org, and a Content library must be created and visible to those who need access to the contract documents.

- A custom object can be used to display contracts that are stored outside the Salesforce org. Permissions can be used to restrict visibility if documents are confidential.

- An Apttus license is required to view contracts stored in the Documents tab but not when using SFDC Content.

Configuration Steps

The setup for each type of repository is executed with Admin settings and configuration that is specific to the type, as outlined in the following sections.

Apttus Agreement Documents

The Agreement Document object is a junction object between the Agreement record and the Salesforce Documents object. When an Agreement is activated and the generated document is selected for storage, the system will create an Agreement Document record. The document is stored in the "Apttus Documents" folder by default. Access to this folder can be set using standard Salesforce permissions.

Configuration Steps:

A. Create the Admin Entry - **APTS_AutoContentSearchable = true**
B. Add the Agreement Document related list to the Agreement Page Layout
C. Review the permissions on the Apttus Documents folder.

A. Create the Admin Entry

Step	Action
1	Navigate to the Admin tab and click **New.**
2	Enter **APTS_AutoContentSearchable** in the Name field
3	Enter **true** in the value field
4	Click Save
Result	The Admin entry that enables content searching is enabled.

B. Add the Agreement Documents related list

Step	Action
1	Navigate to the page layout for the Agreement
2	From the Related Lists section of the edit pane, drag Agreement Documents to the Related Lists section of the layout.
Result	The Agreement Documents related list is visible on the Agreements page.

C. Review the permissions on the Apttus Documents folder

Step	Action
1	Navigate to the Documents tab and select the Apttus Documents folder from the picklist.
2	Click **Edit** next to one of the documents, and confirm that all users have read/write access to the folder.
3	Read, Write and View permissions can be adjusted as needed.

Validate your work:

Step	Action
1	Navigate to a test Agreement that contains a generated document. Ensure that the Status/Category is **not** In Effect/Activated.
2	Click the **Activate** button.
3	Select a Document to be stored in the repository and click **Next.**
4	Do not select any documents in the Remove Draft Document step. Click **Next.**
5	Review that your document is set for **Activation and Content Search**. Click **Activate.**
6	Verify that the Document is visible in the Agreement Documents related list of the Agreement.
7	Navigate to the Documents tab, select the Apttus Documents folder and click Go! Verify that the document is visible in the folder.
Result	You have successfully configured the CLM system to store Activated Contracts in the Agreement Documents repository.

Chatter Files Repository

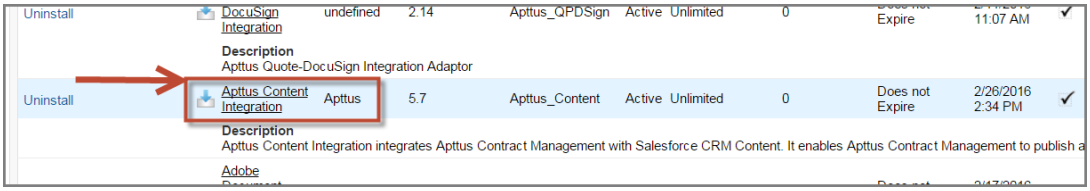
Apttus CLM can store activated Contracts in the Chatter Files repository. Using this setup, a Chatter post with the attached file is created on the activated Agreement's feed.
The contract can be also be searched for and viewed in the Files tab in the Chatter app, depending on the permissions of the user.

Configuration Steps:

A. Install the Apttus Content Integration package
B. Verify that Chatter is Enabled for the Org and enable Feed Tracking on the Agreement Object
C. Apply custom settings in the Admin object.

A. Verify that the Apttus Content Integration Package has been installed in your org

Step	Action
1	Navigate to Build\Develop\Installed Packages.
2	Search for 'content'.
3	Validate that the Apttus Content Integration Package is installed in the org.



B. Enable Chatter and Feed Tracking

Step	Action
1	Navigate to Setup and type **Chatter** in the Quick Find/Search box.
2	Under Chatter Settings, ensure that the **Enable** checkbox is equal to true.
3	In the Feed Tracking section, click on the Agreement object entry. Ensure that you have selected the Apttus Agreement object. It is the one *without* the Additional Recipient fields.
4	Check the Enable Feed Tracking box and click **Save.**

C. Apply Custom Settings in the Admin object

Two Admin entries are required: Content RepositoryType and UI Page Config.

Step	Action
1	Navigate to the Admin tab.
2	Click New Admin and enter **APTS_ContentRepositoryType** in the Name field.
3	Type **chatter** in the Value field and Save and New.
4	In the next admin entry, type **APTS_UIPageConfig** in the Name field.
5	Type **XML** in the value field.

	Copy and paste the following text in the Code field and replace your instance URL in the first line. <UIPageConfig customPageURL="https://***na30.salesforce.com***"> <UIAction name="publish_chatter"> <CustomPage> <Name>Apttus__PublishChatter</Name> </CustomPage> </UIAction> </UIPageConfig> **Click Save.**
Result	The admin entries for enabling activated contract storage in Chatter files has been enabled.

Verify your work:

Step	Action
1	Navigate to a test Agreement that contains a generated document. Ensure that the Status/Category is **not** In Effect/Activated.
2	Click the **Activate** button.
3	Select a Document to be stored in the repository and click **Next.**
4	Do not select any documents in the Remove Draft Document step. Click **Next.**
5	Review that your document is set for **Activation and Content Search**. Click **Activate**
6	Verify that a Chatter post is created in the Agreement feed and that it contains the Activated Contract.
7	Select the Salesforce Chatter app from the menu in upper right of the screen. Click the Files tab and search for your activated contract. Verify that the file is returned in the search results.
Result	You have configured the CLM system to store activated contracts in the Chatter Files repository.

Salesforce Content Repository

When using the Salesforce Content repository for Activated contracts, users who do not have Apttus licenses are able to search for and view activated contracts. The activated contracts are stored in a defined content library. Access to that library is granted to users or public groups.

Apttus Agreement rules are used to route different types of contracts to different content libraries. Each library can have specific permissions to allow for visibility that meets the needs of the business.

Configuration Steps

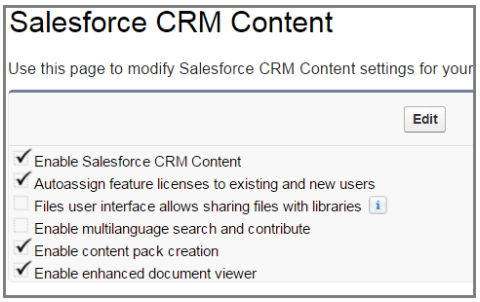
A. Install the Apttus Content Integration Package
B. Configure Content for use in the org
C. Create and apply the Admin entries
D. Setup Content Libraries
E. Optionally create Agreement rules for routing to multiple libraries

A. Verify that the Apttus Content Integration Package has been installed in your org

Step	Action
1	Navigate to Build\Develop\Installed Packages.
2	Search for ‘content’.
3	Validate that the Apttus Content Integration Package is installed in the org.

B. Configure Content for use in the org and align Salesforce Content to the Agreement object

Add org settings and create a contact record type for use with Agreements.

Step	Action
1	From Setup, navigate to Salesforce Files\Settings\Salesforce CRM Content and ensure that the correct settings are checked. 
2	Continuing in setup, navigate to Salesforce Files\Fields and create a **lookup** field to

	the **Agreement** object. ****IMPORTANT - Verify that this is the Apttus Agreement object**** **Once the field is created, open the field detail page and click the Agreement link in the Related To field. Verify that the Object Name is APTS_Agreement. When using e-signature a second agreement object may be in the org.**
3	In Salesforce Files\Page Layouts, create a **page layout** called **Agreement**. Add the **Agreement** lookup field to the new Agreement page layout.
4	In Salesforce Files\Record Types, create a **content version record type** called **Agreement** and ensure that it is Active. Assign the Agreement page layout to the record type.

C. Create and apply the Admin entries for using the Content repositories

Create and apply the following admin entries:

1. Auto Content Searchable = true
2. Content Repository Type= content
3. Content Record Type Name = Agreement
4. Default Content Workspace = Agreement
5. APTS_UIPageConfig contains entries for content repositories.

Step	Action
1	Navigate to the Admin tab.
2	Ensure that the **APTS_AutoContentSearchable** entry is present and the value is set to **true**.
3	Click New Admin and enter **APTS_ContentRepositoryType** in the Name field.
4	*[If the entry is already created, you will only need to change the value field.]* Type **content** in the Value field and Save and New.
5	In the next admin entry, type **APTS_ContentRecordTypeName** in the Name field and type **Agreement** in the Value field. Click Save and New.
6	In the next admin entry, type **APTS_DefaultContentWorkspaceName** in the Name field and type **Agreement** in the Value field. Click Save and New.
7	In the next admin entry, type **APTS_UIPageConfig** in the Name field and type type **XML** in the value field.
8	Copy and paste the following text in the Code field and replace *your instance URL* in the first line. <UIPageConfig customPageURL="https://***na30.salesforce.com/***"> <UIAction name="publish_content"> <CustomPage> <Name>Apttus_Content__PublishContent</Name> </CustomPage> </UIAction> </UIPageConfig> **Click Save.**
Result	The admin entries for enabling activated contract storage in Salesforce Content files have been enabled.

D. Setup Content Libraries

A content library must be created in the org so the system has a library to send the Activated Agreement to for storage. In the setup, we will restrict the record types to be used in the library to the Agreement type specified.

Step	Action
1	Navigate to the **Libraries** tab and click **New** in the My Libraries section.
2	Type **Agreement** in the Name field, then Save and Add Members. Add all users as members and grant them view access and click Save.
3	From the Overview page, click the link for the **Agreement** library.
4	Click the **Record types** link, then add the Agreement record type (and the default) to the library. Check Restrict the record types available in the library and click **Save**.
Result	The SFDC Content Library is ready to store the Activated contract.

Verify your work:

Step	Action
1	Navigate to a test Agreement that contains a generated document. Ensure that the Status/Category is **not** In Effect/Activated.
2	Click the **Activate** button.
3	Select a Document to be stored in the repository and click **Next.**
4	Do not select any documents in the Remove Draft Document step. Click **Next.**
5	Review that your document is set for **Activation and Content Search**. Click **Activate.**
6	Once completed, verify that the selected document is visible in the content versions related list and is no longer visible in the Notes & Attachments related list of the Agreement. Navigate to the Content library and verify that the activated contract is present there as well.
Result	You have successfully configured the Apttus CLM system to store activated contracts in the Salesforce Content Repository.

Appendix B: Admin Objects

The table depicts Admin objects name, values and their purpose.

Name	Values	Purpose
APTS_AutoContentSearchable	True	This automatically enables Content Search on an activated agreement. By setting the flag to true, the system skips the prompt to select attachments for content search. The attachment already selected as part of the activation process will be automatically enabled for content search.
APTS_DefaultEmailContactName	<Name of the user>	This specifies the name of the default contact to resolve merge fields in an email template. To specify the name of a contact to send emails to, if a contact is not defined for the agreement. If this property is not defined and the agreement does not have a primary contact, the merge fields in the email would not be resolved to their values.
APTS_MS_EnableNameSort	True	This specifies whether the related list should be sorted by the name field in the generated agreement document. When enabled the related lists will be printed in the agreement's merge documents in the order of the name field of
APTS_EnableTermExceptionsInAuthor	True	This entry associates the Agreement Term Exception related list to the Agreement record after you have associated your Term Exception with the clause and the clause is inserted in your agreement template.
APTS_ShowSendEmailConfirmation	True	This is a confirmation dialog box to confirm that the email was sent. The confirmation dialog is used to indicate the action taken by the email author (either send email or cancel) so that the activity history and status updates can be triggered.
APTS_Password	<your own password>	This creates a password for protecting Microsoft Word agreements that are generated by the application. Allows the application to password protect generated Microsoft Word documents. This password will be used for password protecting Microsoft Word agreements generated by the application. Please provide this password to all power users who will be using the Apttus Author to negotiate contracts.

Name	Values	Purpose
APTS_Protection	Enter **1** to turn document protection on or **0** to turn it off.	This specifies whether protection for Microsoft Word agreements that are generated by the application should be on or off. Allows the application to specify protection for generated MS-Word documents. If final agreements are generated when this setting is on, they will be password protected with the password stored in the APTS_Password object even if this value is changed to false later. In other words, this setting applies to new agreements generated after the setting has taken effect.
APTS_UseWorkflow	True	This disables the creation of default set of tasks when agreement is generated. In some cases the default tasks created to ensure Signing, Scanning and Attaching the scanned image to the agreement record is redundant or is taken care of by a different work-flow process. In such cases the default behavior of the system needs to be modified to ensure those tasks are not created.
APTS_AsyncMergeCall APTS_AsyncMergeEmail	True	Publishing a template takes the text from any referenced clauses and enters it inline as part of the template text. This functionality allows the clause template changes to be reflected in the agreement template and creates a new published version document in the Notes and Attachment section of the Template. Whenever the agreement document generation exceeds 60 seconds, users get timeout message and this is NOT an error message. To make sure the status changes during this scenario, add these Admin entries.
APTS_EmailTemplateForReview		A boolean property to hold the name of the email template for Send for Review action.
APTS_EmailTemplateForSignatures		A boolean property to hold the name of the email template for Send for Signatures action.
APTS_SkipEmailTemplateSelection		A boolean property to indicate whether the email template selection step should be skipped.
APTS_DefaultEmailTemplateFolder		A text property to hold the name of the default email template folder.
APTS_EmailTemplateForReviewSignatures		If the new properties for email templates are not defined, the older common property APTS_EmailTemplateForReviewSignatures is used.

APTS_ContentRecordTypeName	<content type name>	This property is used to indicate the content type to associate the published documents with. If this property is not specified, no content type will be used.
APTS_UseWizardServer	True	Apttus merge web service endpoint
APTS_UIPageConfig	XML	This property is used to indicate the visualforce page to perform the publish action. The integration module provides the *Visualforce page Apttus_Content PublishContent*.
APTS_MergeCallTimeOut	True	Whenever the agreement document generation exceeds 60 seconds, the timeout message is displayed. This is NOT an error message. To make sure the status changes during this scenario, add these Admin entries
APTS_DefaultContentWorkspaceName	<default workspace name>	This property is used to indicate the default content workspace to publish the documents selected by the user during the agreement activation process. The user activating the agreement must be a member of the default
APTS_CycleTimeReportingEnabled	True	To Track the time spent in between two statuses or status Categories. Entry for the specified status changes under Cycle Time Group tab must be created
APTS_ContentRepositoryType	content	This property is used to indicate in which repository the searchable documents should be published. During the agreement activation process, you may choose to publish one or more documents. If the document repository is chosen, the selected documents will be published to the Documents folder. This is the default behavior in the Comply module. If the content repository is chosen, the selected documents will be published to a content workspace. The workspace (like the document folder) can be inferred by querying agreement rules. If the rules do not specify a workspace, the default workspace will be chosen. The user activating the agreement must be a member of the content workspace. If the external repository is chosen, an entry will be written to the content event table. A trigger can be written for the event table to handle the event.

Appendix C: Comply System Properties

Setting	Description
Admin User	The admin user is the default owner of activities created by a user allowed to be the owner (for example, customer portal user).
Auto Enable PDF For Final	Select this and the Create PDF Attachment check box is always you choose to save as Final - to be signed from the check-in dialog. this field when you want to finalize an agreement document.
Auto Enable Reconciliation	Select this and the Reconcile Document option is always selected to check-in an agreement document.
Agreement Number Field For Imported Docs	In this field, specify the API name of the field you want to use. For Apttus Agreement_Number c. When a new document is imported into the system, it will include the agreement number in the top right the header on each page, using the field selected above. For more about when to use this field, refer *Agreement Number/Header Configuration*
Allow PDF Select Override	This is only applicable when *Auto Enable PDF For Final Docs* is
Allow Reconcile Selection Override	This is only applicable when *Auto Enable Reconciliation* is selected.
Auto Insert Header Footer Data	Select this field to automatically insert the **Agreement Number Field Imported Docs** field value to the header and the latest timestamp to footer of an agreement document. This field is available for Generate, and Offline actions. For more information about when to use this field, *Agreement Number/Header Configuration*.
Bypass Sharing	Indicates whether apex code can bypass record sharing during operations such as clone and deleting draft attachments.
Enable PDF Security	Enabling PDF security lets users apply security settings to PDF protect them with a password.
Footer Datetime Format For Imported Docs	Specify the format in which date and time will be shown in the agreement. When a new document is imported into the system, it will the Date in the bottom left corner of the footer on each page, in the selected above. To know the supported date and time formats for *Setting date and time format for footer*.
Instance URL	The Salesforce instance url for redirecting to custom pages.
Merge Call Timeout Millis	The timeout in milliseconds for the merge request.
Merge Webservice Endpoint	Type the Apttus merge web service endpoint. For example: https:// mwsdev.apttus.net/cgi-bin/360/MergeServer/Bin/ MMCGI.exe
PDF Owner Password	The password required to change permissions of the PDF document or editing.
Publish Merge Events	Indicates whether merge events, such as generating an agreement or creating offline document should be published. If enabled, a record inserted in the Merge Event table. For more information about when field, refer *To get a template ID for genearting an agreement* example.

Setting	Description
Auto Sync With Opportunity	Indicates whether the agreement will be automatically synchronized opportunity when the agreement is accepted.
Sync Bundle Using Line Items	Indicates whether agreement line items should be used to synchronize products. The default uses agreement summary objects.
Sync Option Products	Indicates whether the option products should be synchronized along bundle. The default is synchronize bundle only.
Contract Summary Template	This field contains the name of the contract summary template. You to define a separate template to contain the contract summary details mention the name of the template here.
Default Opportunity Agreement Owner	The default owner for the agreement created from an opportunity. The values for this field are *Opportunity Owner* and *Current User*. If not set, Opportunity Owner will become the owner of the new agreement. If to make the current logged in user as the Agreement Owner, type in this field.
Email Template For Checkin Notification	The email template for sending check-in notifications.
Enable Multiple Checkout	This feature will be functional in later releases. Indicates whether checkout is allowed. Only applicable when version control is in effect.
Enable Version Control	Indicates whether version control is in effect. If enabled, policy is enforced for agreement documents.
Max Child Level	The maximum level to generate the merge data for.

Appendix D: Supported Date/Time Formats

Supported Date Time Format	Example
MM/dd/yyyy	08/22/2006
dddd, dd MMMM yyyy	Tuesday, 22 August 2006
dddd, dd MMMM yyyy HH:mm	Tuesday, 22 August 2006 06:30
dddd, dd MMMM yyyy hh:mm:tt	Tuesday, 22 August 2006 06:30 AM
dddd, dd MMMM yyyy H:mm	Tuesday, 22 August 2006 6:30
dddd, dd MMMM yyyy h:mm tt	Tuesday, 22 August 2006 6:30 AM
dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07
MM/dd/yyyy HH:mm	08/22/2006 06:30
MM/dd/yyyy hh:mm tt	08/22/2006 06:30 AM