

springcm



## Release Notes

August 2016

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## About the Release Notes

SpringCM Release Notes address new enhancements and fixes to the SpringCM platform as well as to the SpringCM desktop and mobile apps.

The SpringCM team is always looking for opportunities to grow and innovate. Your feedback is essential to help improve our product as well as the documentation and online support. Please share what you like and what you don't by sending your feedback to [built4me@springcm.com](mailto:built4me@springcm.com).

## Release Overview

With this release, SpringCM customers can take advantage of many exciting, new features and enhancements that will improve the overall experience for end users, administrators, partners and customers. Please contact SpringCM Customer Success ([success@springcm.com](mailto:success@springcm.com)) if you have questions regarding these features in your account.

Administrators are encouraged to share the information in this document with the users in their own organization.

## Other Announcements

### File It Upgrade program

SpringCM has recently released [File It 4.4](#). This release includes a host of new features designed to make it easier for the Administrator to [configure File It](#).

On July 22<sup>nd</sup>, Sandbox orgs were automatically upgraded to File It 4.4. Please test this upgrade in your sandbox and report any issues should you find any. After completing this testing, SpringCM recommends that you upgrade File It at your convenience. If File It has not been upgraded to version 4.4 or greater by November 11, 2016 in Salesforce Production orgs, then we will upgrade for you. For all of the details, click [here](#).

### SpringCM Desktop Applications

The current endpoints that SpringCM desktop apps (SpringCM Edit, SpringCM Scan, SpringCM Sync, and SpringCM Mobile for IOS) are expected to be deprecated on November 12, 2016. In conjunction with the August release, SpringCM is releasing new versions of SpringCM Edit and SpringCM Sync. Please ensure that your end users upgrade to the following versions by November 12, 2016.

- SpringCM Sync for Mac: 2.9.1
- SpringCM Edit for Mac: 1.4.2
- SpringCM Sync for Windows: 2.8.7
- SpringCM Edit for Windows: 1.5.17

## Enhancements

### Doc Launcher Forms

SpringCM Administrators will likely be familiar with the dramatic improvements we've been making this year around how you create the forms used during document generation in SpringCM. This release continues that pace as we introduce sections for organizing form elements and fields, custom help text messages to aid users completing the form, and more.

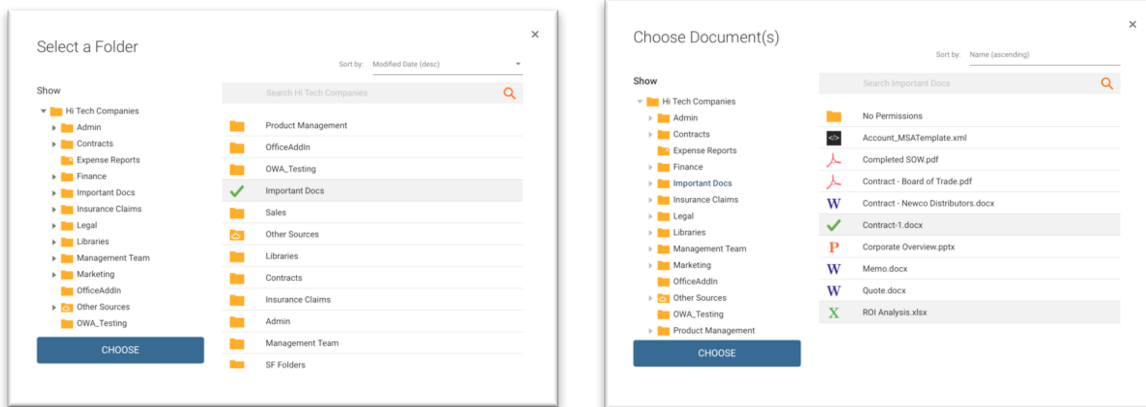
- **Headings and Sections:** New elements have been added to Doc Launcher Forms making it easier for you organize fields into logical organizational groupings.

- **Section and Field Level Help Text:** You can now add Help Text to each field or section. This helps This help text can be used to guide the end user as they enter the field data.
- **Packaging:** Administrators can now include Doc Launcher Forms. You can now package up Doc Launcher Forms and move them to other environments. This allows for valid Doc Launcher Configurations created in source SpringCM accounts (e.g. UAT account) to be packaged and moved to a target account (e.g. Production account) to save time and reduce the chance of errors in recreating the Configurations.

Doc Launcher Form has been enabled in all accounts in conjunction with this release. We appreciate all of the great feedback and are proud to provide this new set of capabilities to all of our customers.

## Doc Launcher Configuration

Doc Launcher and its related administrative tools continue to improve. In this release, there are new enhancements we have made to Doc Launcher Configurations and the end users' experience as well.



- **New Folder and Document choosers** – Beautiful new, easy-to-use *choosers* are now available to simplify browsing and searching for folders and configuration files when setting up your templates.

### Customize Template Messages

Step 1 Instructions  
with information from other data sources, or may have been left blank for you to fill out. Once you've completed the form, click Next to preview and save your document.

---

Step 2 Instructions  
button below to return to the form. If your document looks ready to go, click the Save button to finalize and store the document.

---

Success Message (displays when user click "SAVE")

0 / 200

APPLY
CANCEL

- **Customize Messages for your Users** – We have introduced new options for creating distinct messages for each template in your Configurations. Use the new fields to override the default text that users see in Doc Launcher as they create or upload documents. You can also change the success message displayed before the page closes to help guide your users on next steps.
- **Improved visibility of Filter links** – Doc Launcher offers a way to create and apply filters for large template lists. In this release we have made the links more prominent to aid the user in utilizing filters to narrow down the list of templates.

## Doc Explorer

In the July release, SpringCM previewed a new, responsive page for viewing and working with documents in your account. This new Doc Explorer page will soon become the default interface for interacting with your content in SpringCM.

In the August release, we have introduced a better way to work with your custom Attributes. The Doc Explorer page now provides a new Attributes tab for reviewing and editing metadata for the document. Like all the tabs on the new Doc Explorer page, users can interact with the

Attribute controls just as easily on their smartphone or tablet as they can on the desktop. This makes it convenient to work with your content from anywhere on any device.

Toolbar options are starting to appear as well. Already, users can download or delete documents from the Doc Explorer page. With a single click, you can also view the full Document History. And in-browser editing will also be available from this same toolbar in the next release.

Through our SpringCM Labs program we are actively testing and validating Doc Explorer with customers and are looking to roll this out to all customers before the end of the year. Please reach out to us if you are interested in participating in the program.

## Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **Stronger Account Password Controls** - We have made another big leap forward in terms of account-level security in this release by offering stronger user password options. Administrators may now choose to upgrade the password strength for all the users in the account by requiring more characters and more variables in user-generated passwords.

Administrators can choose stronger password constraints for the users in the account based on internal security policies. The previous settings are now listed as “Fair” and 2 additional options, “Good” and “Strong” increase the criteria for all user passwords going forward.

Upgrading password strength is optional but will take effect immediately, ensuring that users are compliant with the organization’s own security policies.

- **Flexible Password Expirations** – Administrators can now better control the password expiration for users in the account. There are separate settings for Administrators and Subscribers to offer even more flexibility and control for SpringCM customers.
- **Updated Pages for Changing Passwords** – As part of the same password strength and expiration changes, we took the opportunity to refresh these pages to make them more consistent with the rest of the SpringCM interface. You will see these updated pages when resetting or changing your account password. Users will be given additional guidance as they create new passwords with clear and immediate feedback on how to comply with their organization’s password policies.
- **Clause Library Upgrades** - Over the past 12 months, you have seen our commitment to providing our Contracts customers with full support for creating and managing their clause libraries directly in SpringCM. Users will find a number of key upgrades to the SXTerm page to better support working with contract clauses and other terms in your account. A new *Attributes* tab makes it easier to manage attributes for each term in your

clause library. You can also complete workflows steps using a new *Task* tab making it easy to review & approve changes to your clauses via SpringCM's Advanced Workflow.

- **Branded Emails** – Last year's major improvements related to customizing account-level branding have now been extended to better support outbound emails sent from SpringCM. Customers who use *Send SpringCM E-mail* will now leverage the preferences configured in the account to extend the branding options for outbound communication with customers, partners, and vendors.
- **Branded Document and Folder Sharing** – Sharing your content has grown even more powerful, by helping you promote your organization's identity. SpringCM's Share Link feature sends links to your documents and folders to anyone, inside or outside of your account. This release, we've make the feature even more powerful by applying your account branding, logos and colors to shared pages.
- **Friendlier messaging when locked out** – after a great deal of feedback from customers and users, we revisited the experience of being temporarily locked out when a user enters a wrong email/password too many times. Overall, the new experience is friendlier to the user and we now enable the Reset Password link if/when the user is temporarily disabled, providing them with a way to restore access.
- **Rolling REST API Refresh Tokens** – With this release, Refresh Tokens used in securing short lived access tokens will expire after 3 months if not used. Every time a Refresh Token is used to secure an access token, the expiration date will be extended and to 3 months from the time of usage.

## Fixes

Summary	Component
Fixed an issue where selecting use Form Submission Date did not work correctly.	Doc Launcher Forms
Fixed an issue where copying the Merge Tag in Doc Launcher Forms when in Safari fails	Doc Launcher Forms
Fixed an issue where filtering on users via the API with more than 500 users would time out.	API
Fixed an issue where the Start button was missing when completing External Review on an Android device.	External Review
Fixed an issue where characters entered in Japanese are returned as ?'s in Document History and the Complete External Review Page.	External Review
Fixed an issue where the logo setup in Branding does not always show up	Branding



successfully after the change is made.	
Fixed an issue with SXTerm Option Notes & Options Text where non-English and multi-byte characters were not searchable	SXTerm
Fixed an issue where CSVs with escaped quotes fail to extract using the Update XML Variables from CSV file workflow step	Advanced Workflow

## Known Issues

- Setting up a connection between a Salesforce Org and a SpringCM account from File It may return an error when your default account is in a different data center than the target account.
- Adding multiple fields in succession in Doc Launcher Forms without assigning properties may leave one of the fields without the proper validations.

Thanks for your continued support of SpringCM! Please contact your Account Executive or Success Manager for more information about the release.