



springcm

Release Notes

December 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.

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) 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

TLS 1.0 encryption protocol

After we disable TLS 1.0 on March 10, 2017, any inbound or outbound connection with SpringCM will need to use the TLS 1.1 or TLS 1.2 encryption protocol. This change impacts all methods of communicating with the SpringCM platform: internet browser, API, and call out integrations. For additional information, please click [here](https://knowledge.springcm.com/tls-encryption-protocol-standards-effective-april-2016) (<https://knowledge.springcm.com/tls-encryption-protocol-standards-effective-april-2016>).

Enhancements

Doc Launcher Forms

Four releases in a row have seen exciting new capabilities and refinements to Doc Launcher Forms. With this release, you have more control over the content that gets merged and the fields that the end user sees as they fill out the form.

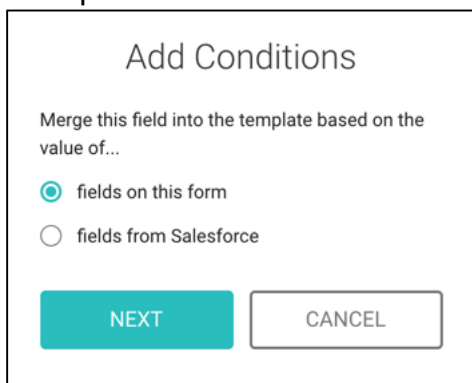
When setting up a new field, you can set conditions using Salesforce fields that determine if the field will be merged into the document.

You can also provide a dynamic experience for your end users as they fill out the form. New fields can automatically display based on user input in the form.

Adding Conditions

Conditions can be added to Text, Date, Number, Currency, Checkbox, Dropdown, Radio Button, and Term fields. A condition will consist of a field, an operator, and a value. If the condition is met, then the field will be merged into the document.

When adding a condition to a Form linked to a Salesforce object, you will be presented with two options:

A dialog box titled "Add Conditions" with a subtitle "Merge this field into the template based on the value of...". It contains two radio button options: "fields on this form" (which is selected) and "fields from Salesforce". At the bottom, there are two buttons: "NEXT" in a teal box and "CANCEL" in a white box with a grey border.

Add Conditions

Merge this field into the template based on the value of...

☒ fields on this form

☐ fields from Salesforce

NEXT CANCEL

Conditions based on Salesforce fields

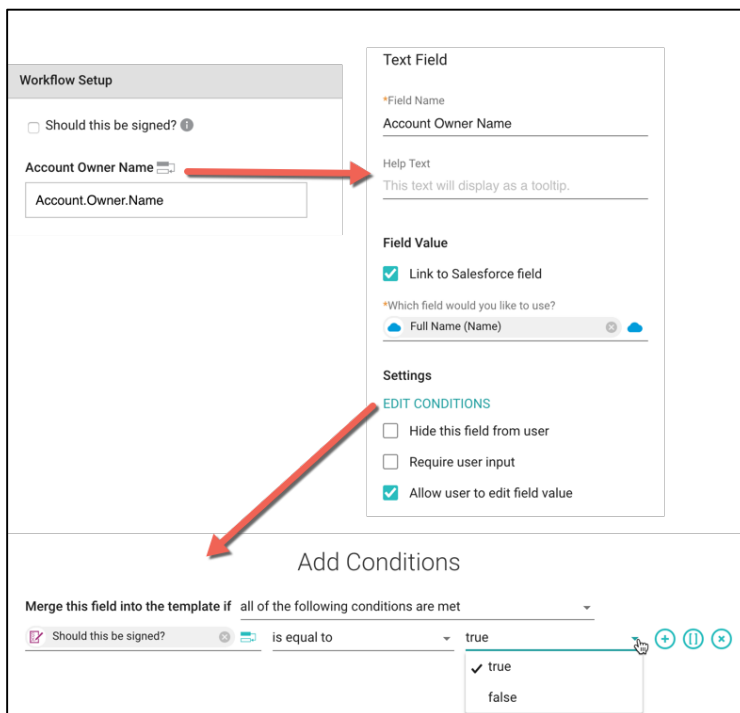
When you choose fields from Salesforce, these conditions are processed before the form loads and will automatically determine if the field is merged. This means that these conditions are evaluated before the form is displayed to the end user. You can add any field from the object or any related object.



Number, Date, and Currency fields also include operators for greater than (or equal), less than (or equal). Separately, you can also identify if the field should display or is editable.

Add Form Fields

Choosing Fields on the Form will allow you to use data on the form to drive the experience as the user fills out the form. Fields can be set to display automatically based on user input. In the example below, if the user answers the question "Should this be signed" and sets the value to yes, then the Account Owner Name Field will immediately be displayed on the Form.



Miscellaneous Enhancements

- Fields that are not visible to the end user are more clearly marked in Form Preview with an icon to the right of the name.
- Fields that have conditions are clearly marked in Form Preview with an icon to the right of the name.
- A Radio Button or Dropdown field added to the Form can now be linked to a Salesforce picklist field.
- A Radio Button or Dropdown field added to the Form can now be linked to a SpringCM Attribute dropdown or dynamic dropdown field.
- Many other usability enhancements.

External Review

In the October Release, we updated External Review to allow you to send up to 10 documents to the reviewer in each transaction. With this release, we have enhanced the experience providing usability improvements for both the sender and the reviewer, making it easier to complete the task at hand.


Sending documents out for External Review

The Send panel has been updated to use standard components that you have seen and will continue to see on more SpringCM pages, providing a consistent experience. This also improves the experience when sending document for external review from within the Review and Send for External Review workflow task.


×

Send for External Review ⓘ


*Recipient:

Who should review this document? 


Also Notify:

Who should be notified of progress? 

*Due Date:

11/27/2016 








Additional Documents:

Select additional documents 

*Email Subject:

Enter an email subject

*Email Message:

☒ Add my signature to this email

[PREVIEW THIS MESSAGE](#)

SEND

CANCEL

Completing External Review

Because the reviewer is the most important person in process, we have added a host of usability improvements to ensure that they are successful in completing the review.

We have made it easier for the reviewer to toggle between documents. When the reviewer clicks on the document name, other documents tied to the review display.

The screenshot shows the SpringCM review interface. At the top, there's a header with the SpringCM logo and a 'DOWNLOAD' button. Below the header, a list of documents is shown for review: 'MSA_20160815_083040.docx', 'SOW_20160419_090158.docx', and 'NDA_20160815_083040.docx'. A sidebar on the left contains a 'Give your feedback' section with a 'DUE BY 11/27/2016' date and a 'Enter your comments' text area. Below this is a 'Drag & drop to Upload a new version or SELECT A FILE' section. At the bottom of the sidebar is a 'COMPLETE REVIEW' button.

As the reviewer uploads their changes, it is now clear which document they are uploading, ensuring that they match their changes to the original document that was sent to them.

The screenshot shows a confirmation dialog with the text 'Which document is MSA_20160815_083040_v1.docx for?'. There are three radio button options: 'MSA_20160815_083040.docx' (selected), 'SOW_20160419_090158.docx', and 'NDA_20160815_083040.docx'. At the bottom are 'OK' and 'CANCEL' buttons.

Finally, when completing External Review, the confirmation highlights what was sent out and what you as the reviewer are sending back. The reviewer can easily see if any mistakes were made and if necessary, make changes.

The screenshot shows the 'Complete review and send your feedback to Chris Van Horn?' confirmation screen. It states 'You can only do this once.' Below is a table comparing '3 DOCUMENTS IN REVIEW' with 'YOUR VERSIONS'.

3 DOCUMENTS IN REVIEW	YOUR VERSIONS
MSA_20160815_083040.docx	MSA_20160815_083040_v1.docx
SOW_20160419_090158.docx	SOW_20160419_090158.v1mych...
NDA_20160815_083040.docx	-

Below the table, there's a 'Your comments:' section with the text: 'John, I am very happy with the results of our latest round of reviews. I have added my changes for the SOW and MSA but these are very minor'. At the bottom are 'CANCEL' and 'COMPLETE' buttons.

Miscellaneous Enhancements

Other changes include the following:

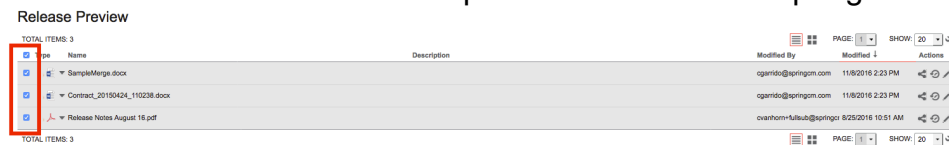
- Improved formatting of the emails sent out to the reviewer, the sender, and any notification participant.
- The Review and Send for External Review step now allows the end user to add, change, or remove any of the additional documents that are being sent out for External Review.

Multiple Documents in E-Signature

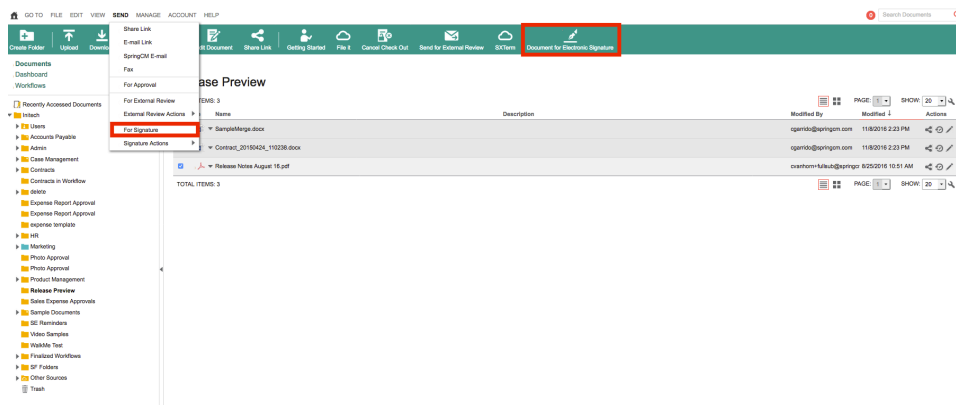
In this Release, we are pleased to add the ability to send multiple documents for signature. As with External Review, you can send up to 10 documents in each transaction. This functionality is available for both DocuSign and Adobe E-Sign Customers. It is also available via our Advanced Workflow.

Sending multiple documents out for Signature

Users will be able to select multiple documents within SpringCM.



Once selected, simply navigate to the menu and click on Send>For Signature or click on the Tool bar menu item.



You will now be taken to the Send for Signature page. You will note that the documents that you have selected will now appear at the very top, separated by commas. You may now add your recipients and compose your message.

Send for Electronic Signature

 SampleMerge.docx, Contract_20150424_110238.docx, Release Notes August 16.pdf



Signers and Message

*To:


Signatures will happen in the order below.

Cc:

Message:

Options

- ☐ Signatures can happen in any order
- ☐ Written signature required (will be sent as a fax)
- ☐ Password protect signature

This signature transaction will expire on 11/9/2016 

SEND

CANCEL

Once the signature is completed, SpringCM will take the completed document, separated and check-in them back into their respective documents. The history for each document will also be updated as well.

Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **API:** The Review and Send for Signature and the Review and Send for External Review tasks now return the document.
- **New Mobile Approval Steps** - Building on the enhancements introduced early in the Summer, we have expanded the list of workflow steps that can be completed with SpringCM's new responsive preview page. Using tablets and smartphones, users can open the new preview page on their mobile devices and complete even more workflow tasks easily. In this release, we expand beyond the first round of steps which included Approve Document, Choice, and Choose User and can now also support Choose Documents and Edit Documents, the latter being subject to the capabilities of the mobile device. Your Workflow Developer can wire up links to the responsive preview page in Advanced Workflow Designer so that users can access the page from email notifications for example. And additional workflow steps will be soon available for mobile devices in upcoming releases so stay tuned.

New Products

Tracker Lightning Components for Salesforce

SpringCM is committed to the Salesforce ecosystem and our investment in supporting our customers there continues as we are bringing documents to the dashboard!

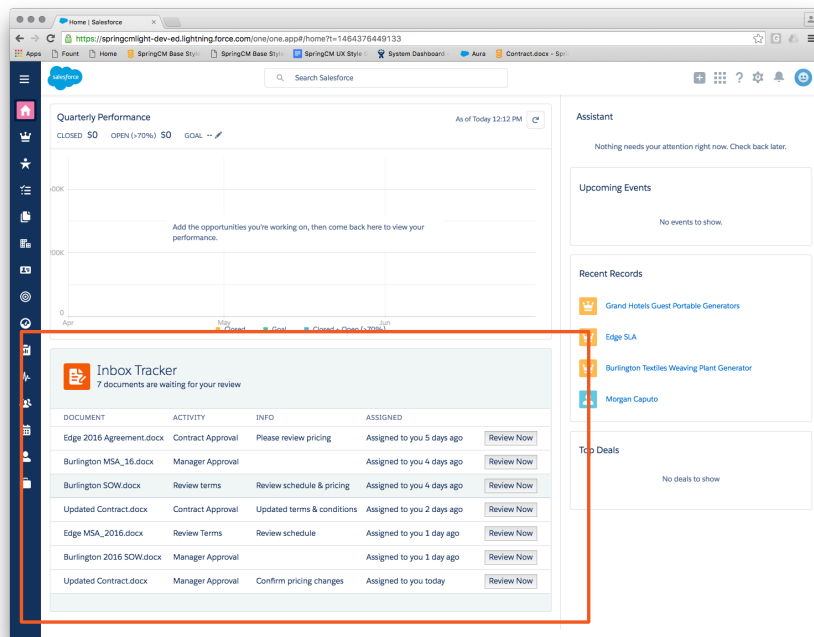
In the December release, we are proud to be unveiling two new Lightning Components that let Salesforce users quickly access the SpringCM documents they care about from anywhere. Our newest *Inbox Tracker* and *Activity Tracker* components can be added to your home page, a dashboard or any other Lightning page to help you stay on top of documents that are in motion.

Activity Tracker and *Inbox Tracker* are the first in a family of *Tracker* components that are built on Lightning and deliver more value to organizations embracing the new Salesforce interface.

Inbox Tracker (beta)

The Inbox Tracker is a window into SpringCM Document Workflow and provides instant visibility into the documents that need your immediate attention, from anywhere in Salesforce.

Inbox Tracker will help Sales teams to stay on top of the documents that are waiting on them. Users can click on items in the Tracker list to rank and prioritize documents tasks, approve or reject pending documents, and review & redline contracts and related agreements.

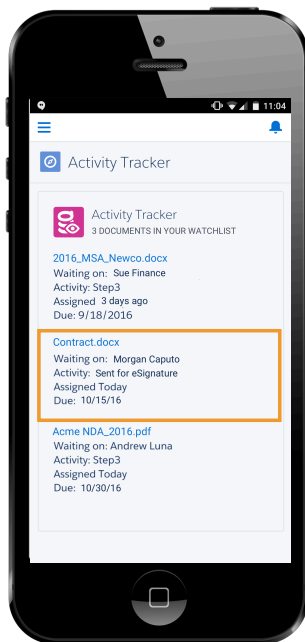


Activity Tracker (beta)

Like the Inbox Tracker, the Activity Tracker Lightning Component helps users stay on top of documents in motion. But with the Activity Tracker, you can keep tabs on documents even if they are not assigned to and waiting on you to complete a task.

Sales Managers may use Activity Tracker to watch over contracts out for signature or to monitor key contracts being sent around for internal review – even if those reviewers are not using Salesforce. For example, it is quite common for Legal teams to review redlined contracts outside of Salesforce which, until now, has presented a challenge to the Sales Rep or Manager who had no visibility.

With Activity Tracker, all the interested parties can see what's happening to any document while it is in motion. Tapping or clicking on a document in the Activity Tracker opens the document in a responsive web page making all the document information, metadata and audit trail details available from any device.



Contact your SpringCM Account Representative to learn more about installing these Lightning Components in your own Salesforce sandbox or production org.

Fixes

Summary	Component
Fixed an issue where sending a SpringCM Email with an attachment did not include a link to the Report	Document History
Fixed an issue where a history message was not written when a document is renamed through WEBDav or SFTP.	Document History
Fixed an issue where resuming a failed workflow failed to continue because variables were cleared.	Workflow
Fixed an issue where when completing a Full Page Fill Form step as a user who has No Access security on the Submit Folder for the form, the step completes successfully, but a system error is displayed	Workflow
Fixed an issue where the user was not correctly returned to the Workflow Inbox after completing the <i>Create or Upload Doc</i> step when logged into SpringCM via One Login or similar SSO provider	Workflow
Fixed an issue where using Google as the Identify Provider for SSO would return an error when attempting to redirect back to SpringCM	Single Sign On
Fixed an issue where deleting an uploaded document when completing External Review left an unwanted message on the page.	External Review
Fixed an issue where attempting to complete External Review on behalf of the recipient as a Super Administrator returned the Time's Up page.	External Review
Fixed an issue where two warning messages are returned when attempting to send out a checked out document for external review	External Review
Fixed an issue where an image file could not be sent for External Review	External Review
Fixed an issue where no views were displayed in the Activity Tracking Panel when a document is sent out for External Review	External Review
Fixed an issue where a Doc Launcher Form linked to Salesforce could lose its connection	Doc Launcher Forms
Fixed an issue where saving a Doc Launcher Form with an invalid character in the Name returned a System Error	Doc Launcher Forms
Fixed an issue where selecting 'Copy Tag' did not return a success message.	Doc Launcher Forms
Fixed an issue where in-browser editing with Office 365 would not save changes to documents larger than 20MB	In-browser Editing
Fixed an issue where creating a document search query with the REST API and paging through the results would not guaranteed to see all the results, i.e. some results could get skipped.	Search API
Fixed an issue where the account logo image was not displayed in IE11	Branding

Fixed an issue where some links in Human Activity workflow steps were not correctly reflecting the account's primary branding colors	Branding
Updated document-type icons for Microsoft Office files (e.g. Word, Excel, PPT) to comply with Microsoft browser standards	Branding, UI

Known Issues

- When defining a condition in Doc Launcher Form that is tied to a Number or Currency Field, you can only set a whole number value.
- A Doc Launcher Form that includes a dropdown linked to a SpringCM attribute field returns an error if packaged up and installed in a new account.

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