

SpringCM

Release Notes
December 2017



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Enhancements

SpringCM has delivered the following enhancements with the December 2017 release.

Workflow Designer

We have made the following improvements on both the Review and Send for External Review and Send for External Review steps of the new Workflow Designer:

- We added a *Hide due date from email* checkbox under the body textbox in the Email section of the properties panel.
- We added an *Email Appearance* field with two options:
 - Use branded HTML email template (this is the default)
 - Use standard text email

When viewing an External Review step in Doc Preview (both legacy and new designers):

- We added the *Hide due date from email* checkbox under the *Due Date* field.
- We added the *Email Appearance* field and options below the *Add my signature to this message* checkbox. These options default to the selected values from the workflow step if coming via workflow.
 - If you select *Use standard text email*, then the preview email should look more informal, like an email that one might send via Gmail, for example. The preview also displays a signature or footer message (if provided and enabled), but does not display a header logo.
- If you checked *Hide due date from email*, then the due date does not display for either the branded HTML email or the standard text email.

Reports (Closed Beta)

Thanks to all the valuable feedback we have received from our beta customers, we have continued to make improvements to the Workflow reports. We expect to open the beta program after this release to all customers.

The reports display workflow names, process names, steps and stages.

- **Workflow name:** The name of the workflow if there is no process name. Otherwise, this column displays the process name.
- **Stage:** The name of the stage if you have one entered. Otherwise, this column displays the step name.

The report groups multiple steps with the same stage name under their shared stage name. If you change a workflow detail, (e.g., a stage name), workflows either in the process of executing or have already executed do not reflect the change. Both new Workflow reports can display on the new Dashboard using the Reports widget.

Workflow Aggregates Report (Closed Beta)

The Workflow Aggregates report allows users to get a high-level view into the workflow activity during a time window. The report in its current iteration of development refreshes every morning. **Please note that workflow data prior to August 26, 2017 is not available for use in the Workflow Aggregate report.**

- The Workflow Aggregates report now displays daily aggregate data.

Workflow Details Report (Closed Beta)

The Workflow Details report allows users to see all the individual workflows that were active during a specific range. The report currently refreshes every 15 minutes.

- You can now filter the Workflow Details report by document attributes.

You can save the report and add it as a widget to the dashboard (the saved report reflects the state of filters and columns when you saved it).

Doc Launcher Forms

The following improvements have been made to the Doc Launcher Forms wizard in Preferences:

- You can use a CSV file to populate a dropdown field when you are building a Doc Launcher form. Click the Add Field button and choose the Dropdown > Link to CSV Document option. As long as the CSV is saved in your SpringCM account, you can choose it to use when adding a new dropdown to a form.

To update the content in this field with a new CSV, you must check out the old version and then check in a new version.

- The Merge Tags tab defaults to either the Content Controls or Inline page depending on which version of the document assembler your organization uses.

Internationalization

Set Localization Preferences

You can now set your localization preferences at the user settings level. This was previously done at the account level, but as we continue to grow our efforts in international markets, we have made it more flexible to accommodate individual users in many countries.

This setting in its current state of development pertains only to number and date formats. Scheduling uses the account's current time zone.

European Date Settings

SpringCM now handles European date formats for reports (excluding the Workflow Aggregates and Workflow Details reports) and date fields in Doc Launcher forms.

E-Signature

You can now download the AdobeSign audit report to track the progress of a document. You can access the report from the Send menu >Signature Actions on the toolbar.

Salesforce Integration

Integration setup has been made more secure when connecting to SpringCM via Salesforce. You are now required to log into SpringCM when you do the following:

- When deleting a SpringCM connection from Salesforce
- When setting up an integration user
- When deleting an integration user

Search

More menu actions are available on the search results toolbar.

Fixes

SpringCM has delivered the following resolutions with the December 2017 release.

Address Book

- The Managed By attribute now gets assigned to users if they were created via Bulk Import Users with a .csv file that has the manager in the same list.
- Users without passwords (e.g., users created via User Sync, inactive users, etc.) no longer receive a non-functioning password reset email if someone tries to reset the password associated with that user.

Documents

- If a user has two first names (e.g., Mary Jo Smith), both of their first names now display in the activity pane when previewing a document with a Document Process Tracking Activity (e.g., "Sent to Mary Jo " vs. "Sent to Mary").

Preferences

- Renaming the root folder in an account now immediately changes the folder name.
- Configuration URLs now display the full URL rather than a loading spinner when accessing Doc Launcher Configurations from within your Salesforce instance.

Reports

- An error no longer displays when you view a Document Distribution report for a document initiated by a deleted user.

Security

- Deleted users who had inherited security permissions no longer display in SpringCM.

Workflow Designer

- Workflows now fail when the only user with a step assignment has been deleted. The workflow does not fail if a user other than the deleted one is assigned.
- Workflows that failed on the Merge PDF Document step now resume when a deleted PDF is copied back into the specified destination.
- The search field when searching for workflow steps is no longer case sensitive.

Known Issues

The following section lists known issues in SpringCM as of the December 2017 release.

- A decimal attribute field value not in a U.S. numeral format that is set in a document rule (Assign Attribute Value action) is changed when applied to a document. For example, the value 456.789,12 in an attribute decimal field in a document rule gets changed to 456.789.123,00 when applied to a document.
- Editing and saving an Excel XLSX document via SpringCM WebDAV may result in an error from Microsoft when you try to open it. XLS (Excel 97-2003) versions do not result in an error and can be opened.
- A user cannot edit a document with the legacy Salesforce package with the SpringCM Edit application.
- Building a search with attributes in the new dashboards does not allow you to pick a dropdown field.
- Configuring a Reject button with a long label for the Review and Send for External workflow may not be handled gracefully in the user interface.
- A user cannot log out of SpringCM Scan and reauthorize to another account.
- When loading Doc Launcher Configurations, the default tab that opens is Form Field Libraries.
- The left-hand panel of the public share page for a folder cannot be resized.

Feature Deprecations

Workflow Designer

- "Advanced Workflow Queues" has been removed from the Edit menu on the Workflows page. You can access your queues from the Address Book.

SpringCM Track It

- Due to declining customer demand, the SpringCM Track It for Salesforce application will be deprecated at the end of 2017. At the end of the year, the application will be removed from the Salesforce AppExchange. Customers may choose to continue using the current version of the application if installed in their Salesforce org; however, SpringCM will not enhance or bug fix the SpringCM Track It application.

Customized Actions No Longer Support External Icon URLs

- Coinciding with the December 2017 release, customizing actions in SpringCM will no longer support external URLs for icons. SpringCM is adding additional icons that can be used as replacements.

SpringCM Scan

- Due to changing market conditions, the SpringCM Scan will be deprecated at the end of 2017. At the end of the year, the application will be removed from the SpringCM download site. Customers may choose to continue using the current version of the application if installed on their Windows workstations; however, SpringCM will not enhance or provide any updates or fixes to SpringCM Scan in the future.

Single Sign On

- Legacy single sign on has been deprecated both in SpringCM and the PSO Tool.

SOAP API Deprecations

- As of October 2018, SpringCM will be retiring support for legacy versions of the SOAP API. This includes versions v2, v3, v4, v5, v6, v7, v8, v9, v10, v11, v12, and v201305.

Customers who want to continue to use the SOAP API must upgrade to version v201308 or consider moving to the REST API. For more information on converting from the SOAP API to REST, please see <https://developer.springcm.com/guides/migrating-soap-api-rest-api>

Additional Announcements

Workflow To Be Replaced with Tasks

In conjunction with the December 2017 SpringCM Release, you will now access Workflows from the Task Menu in the Go To Menu. Workflow will be relabeled Tasks and this will take the user to their Inbox.

File It 8.0 Upgrade

File It 4.80 was released in conjunction with the October Release. This update includes support for our new data centers in Europe. SpringCM wants to ensure that Salesforce users can take advantage of new features and enhancements. **We ask that all customers upgrade to File It version 4.80 or greater by February 16, 2018.**

Any Salesforce organization that has not been upgraded to this version of the package by this date will be automatically updated via Salesforce push update processes. This upgrade only affects our Salesforce package with the SpringCMEos namespace. You can validate which package you have installed by checking the Installed Packages in App Setup. If you have the File It package with the SpringCM2SF namespace, then this upgrade is not applicable.

Global Navigation header coming in 2018

We at SpringCM are excited to announce that a newly designed global navigation is on its way with the first release of 2018.

We are improving the navigation in SpringCM by creating a logical hierarchy of global and local level navigations. The global navigation header will be consistent and persistent at the top of every page, while local navigation changes based on context.

This marks the beginning of the separation of admin and end-user features to optimize the user experience based on your role.

What's changing

During our continuing efforts in user research, we learned that the Address Book and Forms pages are more widely utilized for Admin configuration and management processes. As a result, the Address Book and Forms pages will be hidden by default for your account (users will still be able to edit their user profile information from the My Account page). You will be able to change this setting from the Customize Navigation page.

The new Tasks page is the new home for the workflow inbox. Admins will still have access to the Workflows page for configuring and managing workflows.

Future consideration: Due to the change in navigation header design, your logo may look distorted. Please make sure to upload a logo that fits the new recommended size. An

optimized logo size will be communicated prior to the release so you can ensure your logo image properly renders.

Alpha-Trust Support

SpringCM had added support for AlphaTrust for electronic signatures. Additional configuration options are required in Preferences to use AlphaTrust e-signature.

E-Signature Changes

AdobeSign is no longer allowing wet/physical signatures to be returned via fax in their new signing experience. Adobe is making this change because fax solutions add noise and the resulting document often has significant fidelity loss. When this feature is retired in the fourth quarter of 2017, signers will need to download the document, print out, sign, scan the document, and then upload back to AdobeSign. AdobeSign will guide users through this process.