



springcm

Release Notes

January 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.

End of Life Announcements

As of January 2016, SpringCM will no longer support version 9 of Microsoft's Internet Explorer desktop browser.

In July 2016, SpringCM will no longer support version 10 of Microsoft's Internet Explorer desktop browser. Users are encouraged to access their SpringCM accounts by using a more recent version of Internet Explorer or other web browser such as Google Chrome, Apple Safari or Mozilla Firefox. Please check with your System Administrator or IT department to determine the best alternative browser.

For more information about waning support of these older versions of Microsoft's own Internet Explorer browser, visit:

<https://www.microsoft.com/en-us/WindowsForBusiness/End-of-IE-support>.

Document links used in either workflows, custom links, or outside of SpringCM need to be updated to refer to the document by its guid (Globally Unique Identifier). In the March 2016 release, SpringCM will no longer support referring to the document by the integer. If your URL includes Idid to refer to the document, then these links will no longer work after the March 2016 release. Here are examples that highlight the differences:

- By GUID:



- <https://na11.springcm.com/atlas/Documents/Preview.aspx?aid=19438&IdUid=cd7a4520-8d9a-e511-908e-3863bb335c14>
- By integer:
 - <https://na11.springcm.com/atlas/Documents/Preview.aspx?aid=19438&Idid=73445134>
 - <https://www.springcm.com/atlas/Documents/Preview.aspx?Idid=23635322&aid=790>
 - <https://www.springcm.com/atlas/Documents/Preview.aspx?Idid=18302ac3-0a6c-e311-9b94-d89d67143430>

To correct any links that use the old format, please perform the following tasks to get the updated format for the URL:

- Login to SpringCM
- Navigate to the document
- Select Send from the document context menu.
- Select Share Link.
- Copy the Private Link URL and use where necessary

Should you need assistance with this, please reach out to Customer Support for help in correcting any links that use the old format.

Other Announcements

In April 2016, SpringCM will disable the TLS 1.0 encryption protocol. Our highest priority is the protection of our customers' data. To maintain the highest standards and to promote the safety of your data, we need to make security updates and in this case retire an older encryption protocol. We are making this improvement to ensure that we maintain alignment with best practices and compliance requirements from the PCI Security Standards Council.

In order to maintain access to your SpringCM Account and its content and data, you will need to ensure that your browsers and API based integrations have TLS 1.1 and/or TLS 1.2 enabled. We recommend that you start assessing this as quickly as possible. 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).



New Product Launch

SpringCM Office 365 Add-In for Clause Management and more

With the January release, SpringCM is expanding support for our Contracts/CLM customers around Clause Management with a brand new Office 365 Add-In that works right inside MS Word or MS Excel. You can now access your SpringCM content while authoring contracts, sales collateral or other documents in your favorite Microsoft Office tool.

The Add-In is easy to install and runs as a lightweight web application directly in your Office 365 apps on both Mac and Windows. SpringCM is using the latest Add-In frameworks from Microsoft to deliver a completely integrated experience. You can work with any MS Word or MS Excel document, whether it is stored in SpringCM or not and use the Add-In to search for, review and directly insert approved content into your document with 1 click!

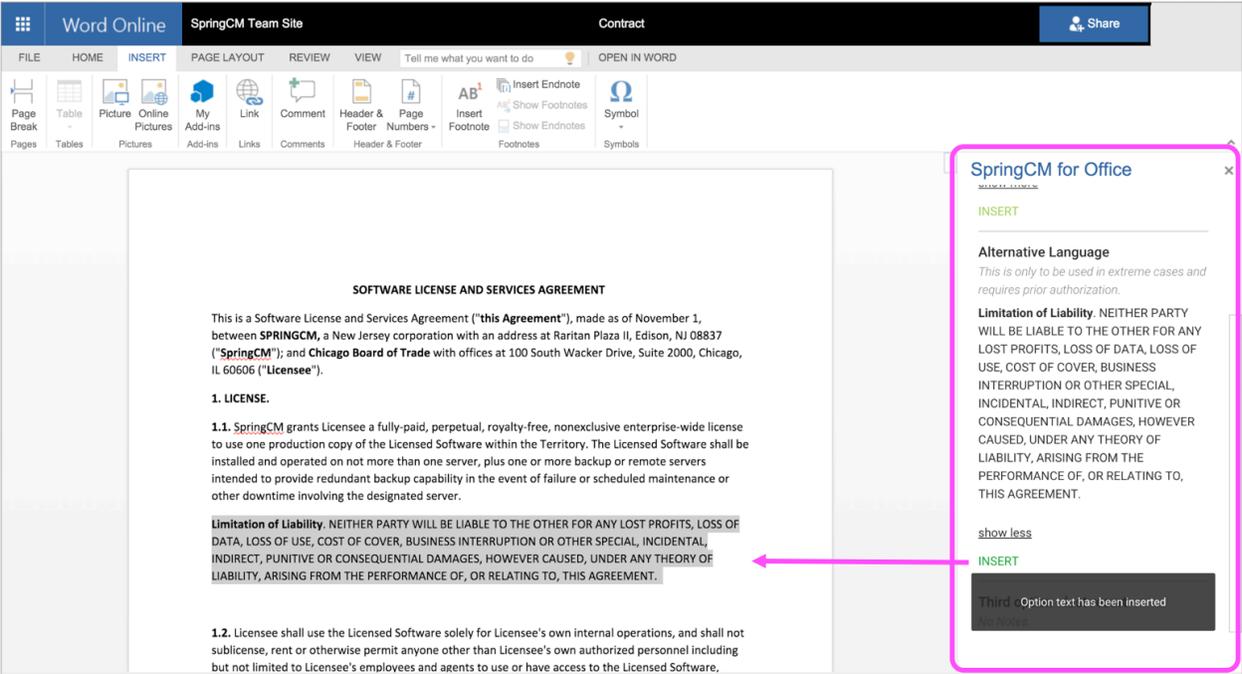


Figure 1 SpringCM Add-In for Office 365



You must be a valid user in an active SpringCM account to use the Add-In. After logging into your account you simply grant permissions for the Add-In to access the content in your account. This authentication step is not required for each time you open a document to use the Add-In.

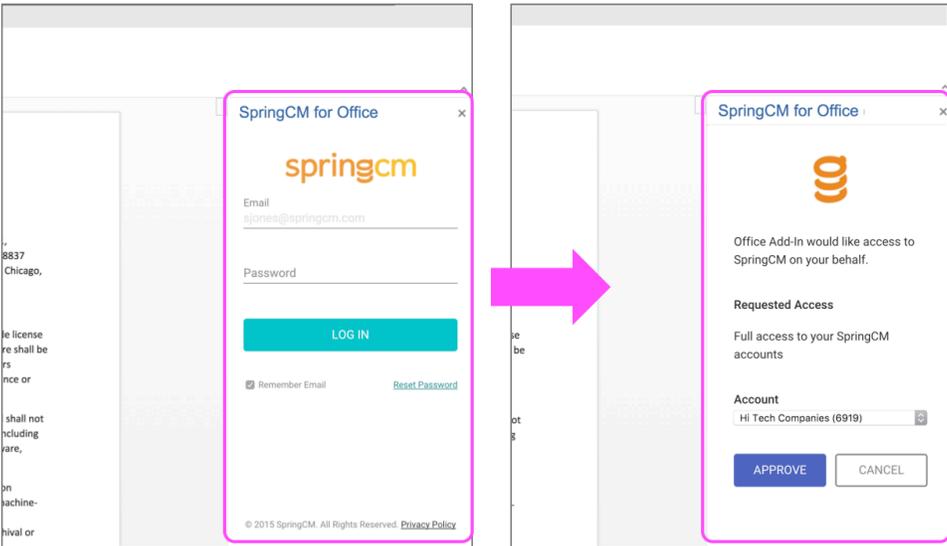


Figure 2 The Add-In uses a familiar 1-time authentication process to log into your SpringCM account

The SpringCM Office 365 Add-In is pre-configured to search for terms in your organization’s clause library. You can create playbooks of clauses and options or libraries of other terms in your account and then access them from the Add-In with a powerful keyword search. Quickly match against the name and description of each clause as well as the full text of each clause option.

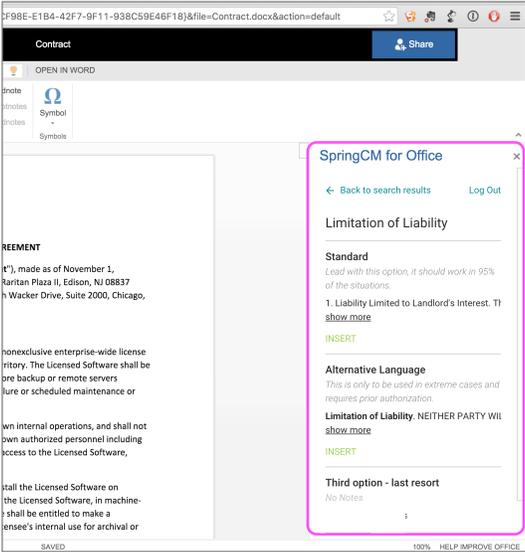


Figure 3 Search results show matching clauses and the options available for each clause





The Office 365 Add-In extends the clause library features already available in SpringCM and brings the benefits of creating and managing a central repository of pre-approved terms within reach of many more companies looking to better manage their contract lifecycle.

The Add-In is available to customers who have licensed and are using Office 365 in their own organization. SpringCM does not include or bundle licensing for Microsoft Office 365 as part of the Add-In.

Please reach out to your Account Executive or Customer Success Manager for more information about this new product.

Editions		Available Via		Available To	
Business	X	Web UI		Guest	X
Enterprise	X	Salesforce1		Full Subscriber	X
Premier	X	Mobile		Administrator	X
		Desktop Apps			
		Office 365	X		



Enhancements

File It 4.0 Salesforce Package

We have heard countless times from our customers that setting up File It is a complex and difficult process to follow and get right. We have taken this feedback and have made it easier for you to set things up for your end users. This package only focuses on improving the setup experience.

Connecting your Salesforce org to your SpringCM Account

No longer do you need to follow a disjointed process of integrating your Salesforce org with your SpringCM Account. We now guide you through a simple integration process that starts with clicking Setup Connection and is as simple as picking the SpringCM Environment and logging into SpringCM.

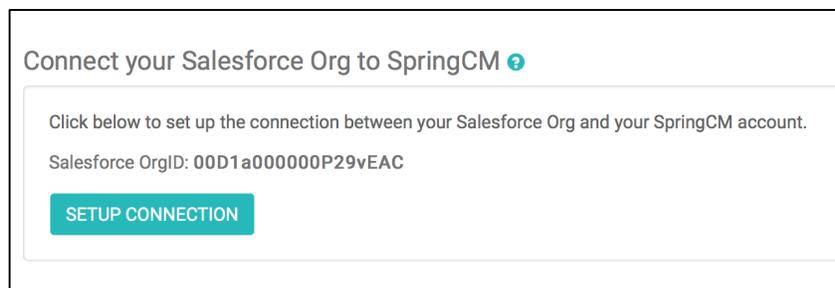


Figure 4 Setup Connection between SpringCM and Salesforce

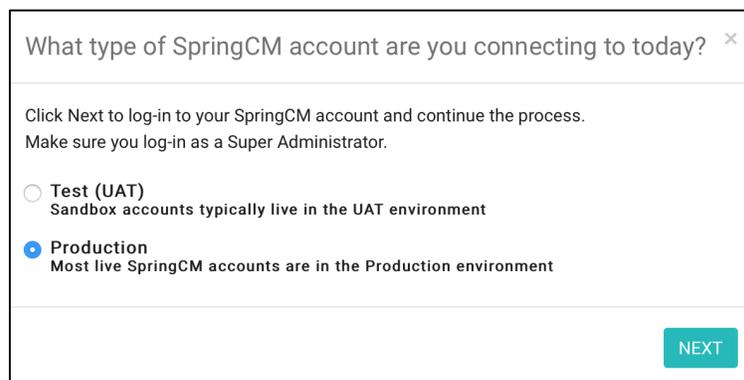


Figure 5 Selecting the SpringCM Environment



The login form features the SpringCM logo at the top. Below it, there are two input fields: 'Email' with the value 'admin@springcm.com' and 'Password' with a masked password '.....'. A teal 'LOG IN' button is positioned below the password field. At the bottom, there is a checkbox for 'Remember Email' and a link for 'Reset Password'.

Figure 6 Logging into SpringCM

A dialog box titled 'Thanks!' with a close button (X) in the top right corner. It includes a 'Step 3' indicator. The main text reads: 'Your Salesforce Org (00D1a000000P29vEAC) has successfully been connected to your SpringCM account (14357)'. A teal 'DONE' button is located at the bottom right.

Figure 7 SpringCM and Salesforce are now connected

Setting Up File It on a Salesforce Object

We have also made it much easier for you to configure File It for each Salesforce object. Here you need to define how you want to organize your folders that represent each Salesforce data record. It is now easier for you to pick fields associated to a Salesforce object in defining the structure.

After each configuration is setup, you need to incorporate the File It Widget on each Salesforce Object. This process has been greatly simplified. Now, we automatically create the Visualforce page for you and where possible take you directly to the page layout section.

The interface is titled 'Map Salesforce Objects to SpringCM Folders'. It features a teal 'MAP NEW OBJECT' button. Below the button is a table with three columns: 'Salesforce Object', 'SpringCM Folder', and 'SpringCM Folder Path'.

Salesforce Object	SpringCM Folder	SpringCM Folder Path
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Figure 8 Map New Configuration



What Salesforce object would you like to setup?

Opp

- Opportunity
- Opportunity Contact Role
- Opportunity Product
- Opportunity Contract

NEXT

Figure 9 Type ahead to pick the Salesforce object

How would you like to name Opportunity folders?

SpringCM will make a folder to store files on your Opportunities. Set the naming for these folders by typing text and adding fields in the box below.

Tip: Click 'insert field' to add Salesforce variables to the folder name

Begin typing to create your folder name. Click Insert Field to add variable from your Salesforce objects.

Opportunity Name (Name) Add Field

BACK

- Account ID (AccountId)
- Amount (Amount)
- Campaign ID (CampaignId)
- Close Date (CloseDate)
- Closed (IsClosed)
- Created By ID (CreatedById)
- Created Date (CreatedDate)
- Current Generator(s) (CurrentGenerators_c)
- Deleted (IsDeleted)
- Delivery/Installation Status (DeliveryInstallationStatus_c)
- Description (Description)
- Expected Amount (ExpectedRevenue)
- Fiscal Period (Fiscal)
- Fiscal Quarter (FiscalQuarter)
- Fiscal Year (FiscalYear)
- Forecast Category (ForecastCategory)
- Forecast Category (ForecastCategoryName)
- Has Line Item (HasOpportunityLineItem)
- Last Activity (LastActivityDate)
- Last Modified By ID (LastModifiedById)
- Last Modified Date (LastModifiedDate)
- Last Referenced Date (LastReferencedDate)
- Last Viewed Date (LastViewedDate)
- Lead Source (LeadSource)
- Main Competitor(s) (MainCompetitors_c)
- ✓ Name (Name)
- Next Step (NextStep)
- Opportunity ID (Id)

Figure 10 Selecting a Field associated to Salesforce Object



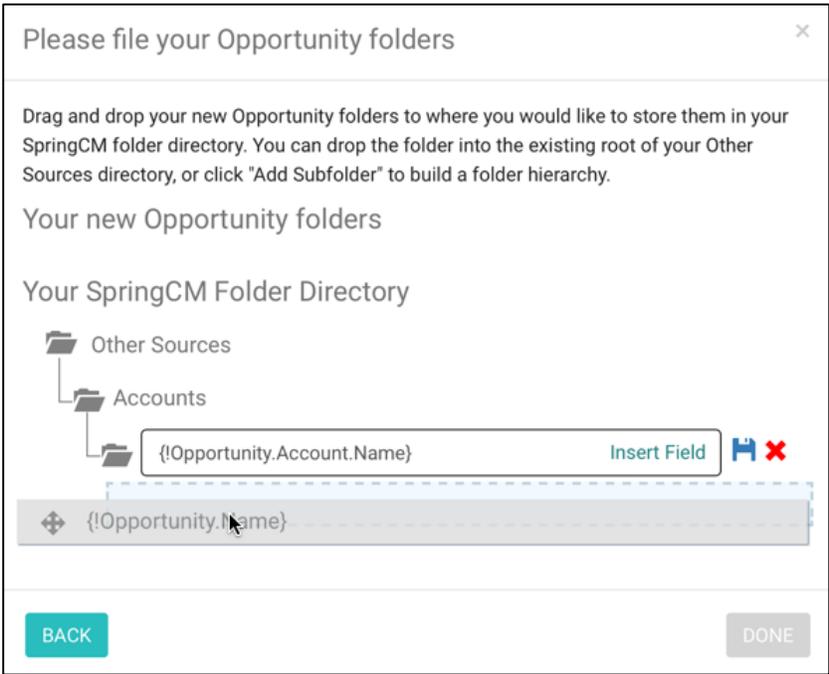


Figure 11 Defining the Folder Path using a Salesforce Field

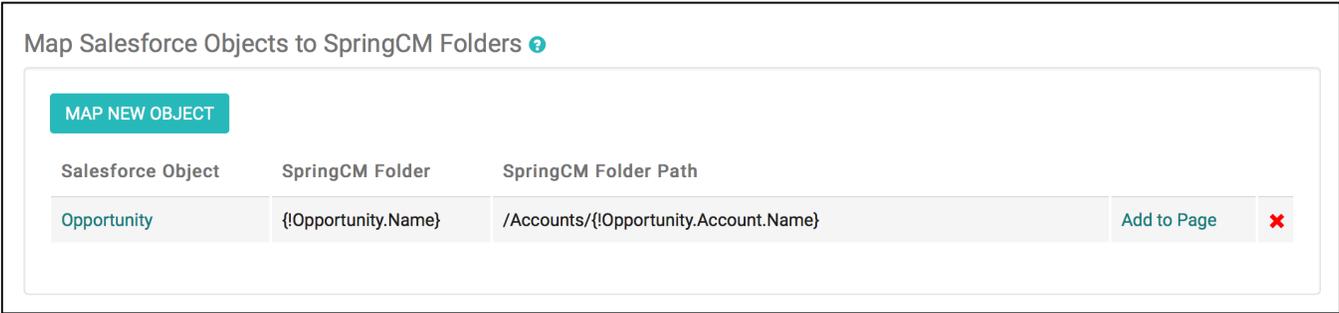


Figure 12 Add to Page creates the Visualforce Pages and guides you through putting on the page

Migration to the new package

Starting in late January, SpringCM will start working with our Salesforce customers to upgrade to this latest release of File It. As this initiative gets underway, we will be reaching out in advance to coordinate this upgrade.

Doc Launcher Improvements

SpringCM has continued to make improvements to Doc Launcher with this release. Our primary focus in this release is to make it easier for an Admin to setup Doc Launcher properly. With this release, we have made a set of key changes that help the administrator set up the URL assigned to a custom button in Salesforce or in SpringCM.



Configuration Name

Configuration Names are now used in defining the URL used to launch Doc Launcher. This makes it easier to read the URL, dynamically pick a configuration from Salesforce to tailor the experience for the end user, and troubleshooting issues should they arise. The configuration name can only be 100 characters and can only include alphanumeric characters, spaces, underscores, and hyphens.

If you change the name after a custom button is setup in Salesforce or SpringCM, you will need to update the button URL to reflect the new name.

URL Generation

We now guide you through setting up Doc Launcher to create the URL to work in SpringCM and provide a great starting point for use in Salesforce. Once the configuration has been updated with where it will be launched from and the parameters selected, the Admin can directly paste the URL into a Salesforce or SpringCM custom button.

Stand Alone Doc Launcher

Doc Launcher is invoked from SpringCM by setting up a custom menu item. A custom menu item consists of a name, URL, and who sees the menu item. We have made it easier for the Admin to create the custom button by providing a properly constructed URL that can be pasted directly into the configuration parameter. The Admin selects that this configuration will be launched from SpringCM and then picks an output folder where documents will be generated. On saving the configuration, the URL is updated to include the new configuration name and the output path.



Doc Launcher Configuration

What would you like to name this configuration?
Configuration Name
MSA 3 / 100

What document should be in this configuration?
Use this section to add new document templates, group templates, or drag and drop to reorder the list.

W MSA

Would you like this configuration to kick off a Workflow?

Start this workflow: _____

I don't need to start a workflow when this document is generated.

Where will this configuration launch from?

Select Location ▾

Would you like to run this configuration in Debug mode?
Debug mode saves log files when documents are generated using this configuration.

Run in Debug mode

Figure 13 Specify where this configuration will be launched from

Where will this configuration launch from?

SpringCM ▾

Select Location _____ t to save the generated document?

Salesforce

✓ SpringCM

Figure 14 Select SpringCM as the launch location



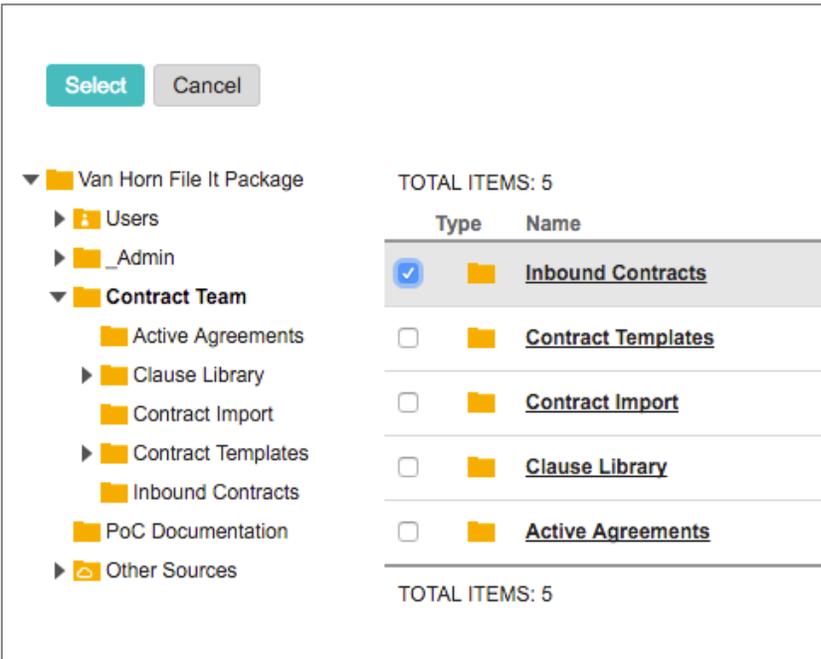


Figure 15 Select the output path for SpringCM

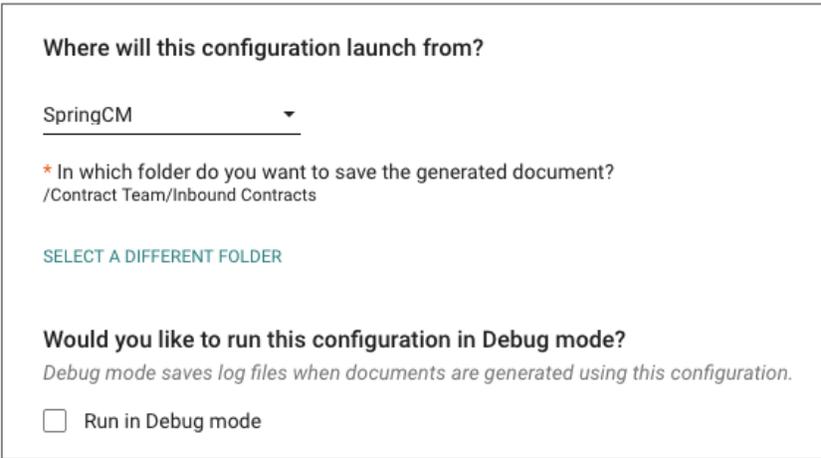


Figure 16 SpringCM output path selected

CONFIGURATION NAME	URL
MSA	https://qana11.springcm.com/atlas/doclauncher/form/MSA?aid=19438&folderPath=/Contract Team/Inbound Contracts

Figure 17 Updated URL for SpringCM



Salesforce Doc Launcher

Doc Launcher is invoked from Salesforce by setting up a custom menu item. In order for you to configure launching from Salesforce, the following conditions need to be met:

- *The Salesforce org needs to be properly integrated with SpringCM:* This means that the SpringCM account is directly tied to a Salesforce org. To confirm this, navigate to SpringCM preferences and check the Salesforce configuration. If the Salesforce Organization ID is set, then this condition has been met.
- *The Sync User must be set.* The Sync user is used by SpringCM to query out to Salesforce for data associated to the object as Doc Launcher runs. This user must be set up in SpringCM. If the Sync User has been defined, then this condition has been met.
- *File It must be configured on Salesforce objects:* File It must be set up and configured for standard or custom objects. This means that File It can be loaded by the end user in Salesforce.

Once these conditions have been met, you will then be prompted to pick the Salesforce object where Doc Launcher will be setup. After saving the configuration, the URL is updated to include the new configuration name and all of the parameters necessary to run Doc Launcher in Salesforce.

The URLs generated by SpringCM may need to be adjusted in order to work in Salesforce. These URLs will work most of the time but you may need to update the URL when you try and save the custom button in Salesforce. The two key parameters that you may need to update are the ScmPath and Name parameters. If the syntax is incorrect, then Salesforce will highlight the variable that is defined incorrectly and you can easily update the URL by selecting the field.

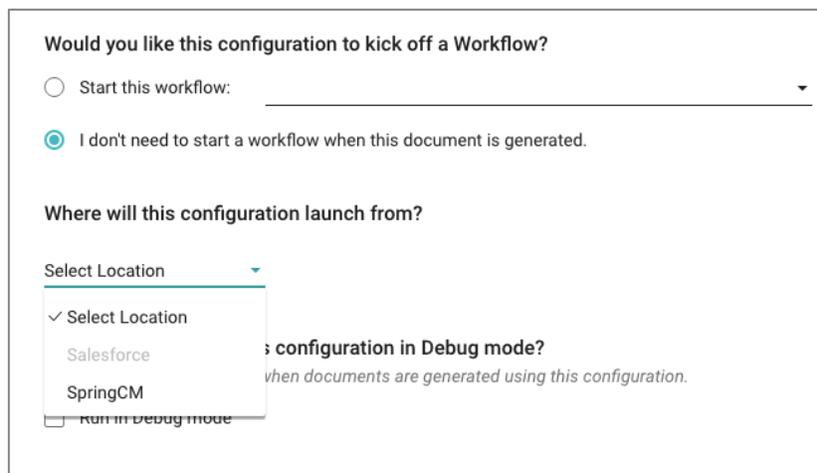


Figure 18 Salesforce is greyed out because one of the 3 parameters is not met

Would you like this configuration to kick off a Workflow?

Start this workflow: _____

I don't need to start a workflow when this document is generated.

Where will this configuration launch from?

Salesforce

- Select Location
- ✓ Salesforce
- SpringCM

Would you like to run this configuration in Debug mode?

Debug mode saves log files when documents are generated using this configuration.

Run in Debug mode

Figure 19 Salesforce is selected

Where will this configuration launch from?

Salesforce

* From which Salesforce object?

Opportunity

- Account
- opp_Contract_c
- ✓ Opportunity
- Dashboard

Would you like to run this configuration in Debug mode?

when documents are generated using this configuration.

Figure 20 Select an object that is configured in File It

```
Opps https://qana11.springcm.com/atlas/doclauncher/eos/Opps?aid=19438&eos[0].Id={!Opportunity.Id}&eos[0].System=Salesforce&eos[0].Type=Opportunity&eos[0].Name={!Opportunity.Name}&eos[0].ScmPath=/Accounts/{!Account.Id}
```

Figure 21 URL generated for Salesforce

Migration from a previous release

Stand Alone URL's used to launch Doc Launcher directly from SpringCM **will no longer work** once the release is deployed. Please make sure that you do the following to update the URL in the SpringCM custom button. As the Admin, perform the following steps:

- Navigate to Doc Launcher preferences
- Select the Configuration
- Pick SpringCM as the location that you wish to launch from



- Select the folder that generated documents will be delivered to
- Save the configuration
- Paste the URL into the SpringCM custom button

Miscellaneous Enhancements

- Doc Launcher now only generates a MS Word .docx output file when using a MS Word .docx template. Previously an additional, separate PDF "package" document would also be created and saved in the same folder. This extra document was not being used by customers and in most cases, was being summarily deleted immediately after being generated. If you need access to the PDF rendition of the MS Word (.docx) document, it is always available from the browser by selecting View PDF from the document preview.
- The Doc Launcher page will not show the link to "Start over with a different document" if there is only 1 template in the configuration. The modal dialog that allows users to select from among a list of templates is not shown (i.e. skipped) when there is only 1 template specified in the configuration and so is unnecessary in this scenario.

Editions		Available Via		Available To	
Business	X	Web UI	X	Guest	
Enterprise	X	Salesforce1		Full Subscriber	X
Premier	X	Mobile		Administrator	X
		Desktop Apps			

Other Enhancements

In addition to these new features, SpringCM has delivered the following enhancements in this Release:

- **Launch Forms from Action Tiles:** Users can now launch forms via action tiles. When creating an action tile, you can now select an form from a drop down list.
- **Launch Workflows from Action Tiles:** Users can now launch workflows from custom action tiles. When creating an action tile, simply select the desired workflow from a drop down list.
- **Icon Picker for Action Tiles:** We have now given users the ability to select an icon for the newly created custom action tiles. Users can also elect to use a custom icon by adding an image URL. This means that users now better differentiate between other custom action tiles.
- **Converted Share Document panel:** We converted the Share Document panel to provide a more consistent experience for the user. This meant converting the "slide-up" behavior of the panel to the more familiar modal interface. At the same time, we applied



the new branding tags so that this modal will reflect any color changes made in the Branding Preferences page.

- **Converted Compare Document panel:** We converted the Compare Document panel to provide a more consistent experience for the user. This meant converting the "slide-up" behavior of the panel to the more familiar modal interface. At the same time, we applied the new branding tags so that this modal will reflect any color changes made in the Branding Preferences page.
- **Package Reminder Templates to copy across SpringCM accounts** - Administrators can now include Reminder Templates in the *spackage* file. This allows for valid Reminder Templates created in source SpringCM account (e.g. UAT account) to be packaged and moved to a target account (e.g. Prod account) to save time and reduce the chance of errors in recreating the Templates.
- **Package Branding preferences to copy across SpringCM accounts** - Administrators can now include Branding Preferences in the *spackage* file. This allows for any and all Branding options created in source SpringCM account (e.g. UAT account) to be packaged and moved to a target account (e.g. Prod account) to save time and reduce the chance of errors in recreating the logo, colors, or footer settings.
- **Complete External Review as a SpringCM User:** The sender can now complete the External Review on behalf of the reviewer. This new feature helps in cases where the reviewer responds directly to the original sender.
- **Compare Documents step in Advanced Workflow** now has a separate output path for timeout scenarios.
- **Document History Sticky Filtering and Sorting:** The next time you come back to the document history or folder history page, the same filtering and sorting will be filtering and sorting will automatically be applied.

Fixes

Summary	Component
Fixed an issue where a document history message did not include a link to the workflow step in the Process Monitor	Documents (History)
Fixed an issue where helper text overlaid the Template Name in Doc Launcher Configuration	Doc Launcher (Config)
Fixed an issue where a System Error is returned when you select Done on the History Page after going directly to it from the File It Grid.	Documents (History)
Fixed an issue where you could select Done multiple times when completing the Review and Send for External Review workflow step.	External Review
Fixed an issue where the sorting behavior in the Document History page was not consistent with other pages,	Documents (History)
Fixed an issue where the email sent to the reviewer on completion or cancellation of External Review did not come from the original sender.	External Review
Fixed an issue where the Wait for Signal workflow would not follow the	Workflow



timeout path	
Fixed an issue where the email subject setup in the Review and Send for External Review gets truncated at 50 characters when the Email is received by the reviewer	Workflow (External Review)
Fixed an issue where the Copy Folder step falsely finished successfully if the new folder being created included any of these illegal characters \ / : * ? " < > ".	Workflow
Fixed an issue where the PDF Merge step allowed the document to be named with .docx extension.	Workflow
Fixed an issue where the desktop experience was not always provided when completing external review as the reviewer	External Review
Fixed a number of small account branding inconsistencies where links and buttons on some pages were not picking up the correct accent colors	Account Branding
Fixed an issue where the Save and Cancel buttons were not functional when viewing an SXTerm document from inside Salesforce.	SXTerm, Salesforce
Fixed an issue where the Cancel button was not closing the Doc Launcher window when launched from inside Salesforce.	Doc Launcher
Fixed an issue where a long Description value for an SXTerm document was not being properly displayed.	SXTerm
Fixed an issue where a user selected by the User Chooser may not always be selected	User Chooser control
Fixed an issue where the Document Reminder panel would not close properly after the Send for External Review step was canceled	External Review
Fixed an issue where the success/warning/error message would sometimes display at the top of the page vs. the top of the browser window forcing the user to scroll to the top of the page to see the message.	Messaging
Fixed an issue where reverting a public document link to a private link was broken.	Document Sharing
Fixed an issue where the SetAttributeValue action on a Smart Rule was not properly verifying some date values when assigning attributes to a document	Smart Rules
Fixed an issue where the Wait for Signal Activity does not handle a timeout properly	Workflow



Known Issues

- When External Review is completed on behalf of the reviewer by a SpringCM user, the success message does not include the recipient name.
- When External Review is completed on behalf of the reviewer by a SpringCM user, there may be horizontal scroll bars in the dialogue.
- When External Review is completed on behalf of the reviewer by a SpringCM user with a document, the page may not refresh to show the uploaded document.
- When creating a template in Doc Launcher Config and you select the document in the grid and then select a folder in the tree, the chooser may lock up.

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

