springcm

Release Notes

January 2017

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).

SpringCM Edit, Sync, and Scan for Windows

New versions of Sync, Edit, and Scan for Windows will be made available shortly after the release on January 20, 2017. These versions of the software support the TLS 1.2 encryption and must be installed prior to our March 10, 2017 platform release. Please ensure that you check trust.springcm.com for notification on when these clients are available.

Outbound Emails

Outbound Emails will come from mailman.springcm.net or mailman+uat.springcm.net instead of mailman.springcm.com or mailman+uat@springcm.com. This change is being made in conjunction with this release. Please make sure your organization whitelists both the email addresses and the new email domains to ensure consistent delivery of SpringCM emails once the change is enacted on January 20th.

Office to PDF Generation

SpringCM will upgrade its PDF generation of Office documents service to use Office 2016 in the March 2017 release. SpringCM online preview for Office documents will also reflect this change.
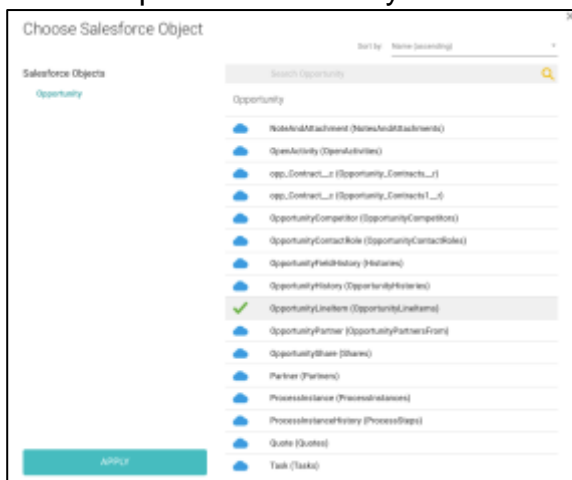
Enhancements

Doc Launcher Forms

Tables

We have taken Doc Launcher Forms to new heights with this release. You can now add a table to a Doc Launcher Form linked to Salesforce. Tables are used when you need to pull Opportunity Line Items, Quote Line Items or other Salesforce items that support a One to Many relationship into one of your contract.

Opp Line Items				
Product Name	Product Code	Sales Price	Quantity	Line Price
GenWatt Propane 500kW	GC3040	$50,000.00	234.00	$11,700,000.00
GenWatt Diesel 200kW	GC1040	$25,000.00	6,234.00	$155,850,000.00
Installation: Industrial - Low	IN7040	$20,000.00	5.00	$100,000.00
SLA: Gold	SL9060	$30,000.00	3.40	$102,000.00
SLA: Platinum	SL9080	$40,000.00	3.00	$120,000.00
SLA: Bronze	SL9020	$10,000.00	2.00	$20,000.00
Installation: Portable	IN7020	$5,000.00	4.00	$20,000.00
GenWatt Diesel 1000kW	GC1060	$100,000.00	2.00	$200,000.00
Installation: Industrial - High	IN7080	$85,000.00	24.00	$2,040,000.00
GenWatt Diesel 10kW	GC1020	$5,000.00	5.00	$25,000.00
Installation: Industrial - Medium	IN7060	$50,000.00	5.00	$250,000.00
GenWatt Gasoline 2000kW	GC5060	$150,000.00	2,134.00	$320,100,000.00
GenWatt Propane 100kW	GC3020	$15,000.00	2.00	$30,000.00
GenWatt Gasoline 750kW	GC5040	$75,000.00	5.00	$375,000.00
SLA: Silver	SL9040	$20,000.00	234.00	$4,680,000.00
GenWatt Propane 1500kW	GC3060	$120,000.00	4.00	$480,000.00
GenWatt Gasoline 300kW	GC5020	$35,000.00	2.00	$70,000.00

- **Create a Table and select the Object:** After you create the table, select the right relationship. With this release, you will only be able to choose One to Many relationships that are directly linked to the current Salesforce Object.

- **Filter:** Optionally you can add a filter that limits the results based on fields associated to the Salesforce object.

Add Filters

Display results in this table if all of the following filters are met ▾

☁ Product Name (Name) ⊗ ▭   contains   ▾   kw100   ⊕ Ⓘ ⊗

- **Add Columns:** As you build out a table, select the columns of information for each row that you would like to return. You can also reorganize the columns.

Opp Line Items

Product Name	Product Code	Sales Price	Quantity	Line Price
Opportunity.OpportunityLineItem...	Opportunity.OpportunityLineItem...	Opportunity.OpportunityLineItem...	Opportunity.OpportunityLineItem...	Opportunity.OpportunityLineItem...

- **Sort:** Sort the results in ascending or descending order based on columns added to the Table.

☑ Sort by...

*Column
Line Price   ▾

◉ Ascending   ○ Descending

- **Formatting:** Number, Currency, and Date fields can be formatted properly.

Miscellaneous Enhancements
- A new date format (MMMM d, YYYY) has been added for Date fields.
- New operators have been added when defining conditions. These conditions include
  - o Is not equal to
  - o Has a value
  - o Does not have a value
- When defining a condition for a number or currency field, you can now set a value that includes a decimal value.
- Conditions can now be applied to a Section.
- When defining a Date field, you can now automatically pad the result with a pre-selected number of days.
- Many other usability enhancements.

Salesforce File It 4.50 Release

Continuing a process that we started last year, we have made additional improvements to the setup process for File It. With this release of the package, we have taken more configuration options and have moved them to Salesforce. Equally and more importantly, we are releasing the Inbox and Activity Tracker Lightning components.

Integrating the Salesforce Org with a SpringCM account

In a previous major release of File It, we moved setting up the connection between the Salesforce Org and SpringCM from SpringCM into File It. With this release, we have extended this process to include the following:

- Changing the environment prompts you to first delete the connection in the current environment prior to setting up the new environment.
- Deleting the connection from File It.

My Domain Access

In the Salesforce Spring 2017 release, Salesforce anticipates requiring all orgs to be set up with a My Domain. With this release of the package, we are including support for My Domain. If you have integrated your org with SpringCM previously, you may need to reintegrate with SpringCM to ensure that the "My Domain" is set properly.

Setting up the Integration User

The Integration User is required if your organization uses Doc Launcher, Workflow, or User Sync from within Salesforce. It is used in background processes that perform user creation, task creation, and execute workflow steps that call back into Salesforce. With this release, we are no longer storing a username and password + an encrypted security token and instead are using a Refresh Token to access Salesforce. Here you will be able to

- Set the Integration User
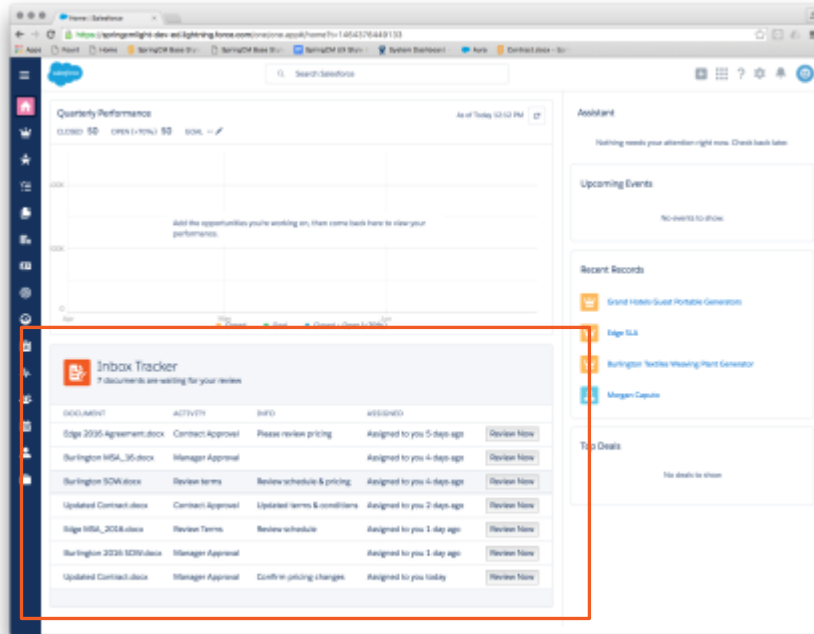- Change the Integration User
- Delete the Integration User

We recommend that you set the Integration User after upgrading to this version of the package. This will replace the legacy Sync User set up in SpringCM.

Inbox and Activity Tracker Lightning Components

In the December release, we announced 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.

The Inbox Tracker provide immediate visibility into tasks that require your attention and are assigned to you. Sales Reps or other members of the organization can see and complete tasks that are assigned to them from one place in Salesforce.

Like the Inbox Tracker, the Activity Tracker allows you to keep tabs on documents that you are interested in even if they are not assigned to you. Sales Managers may use the Activity Tracker to keep tabs on contracts initiated by their team and easily see where they are at.

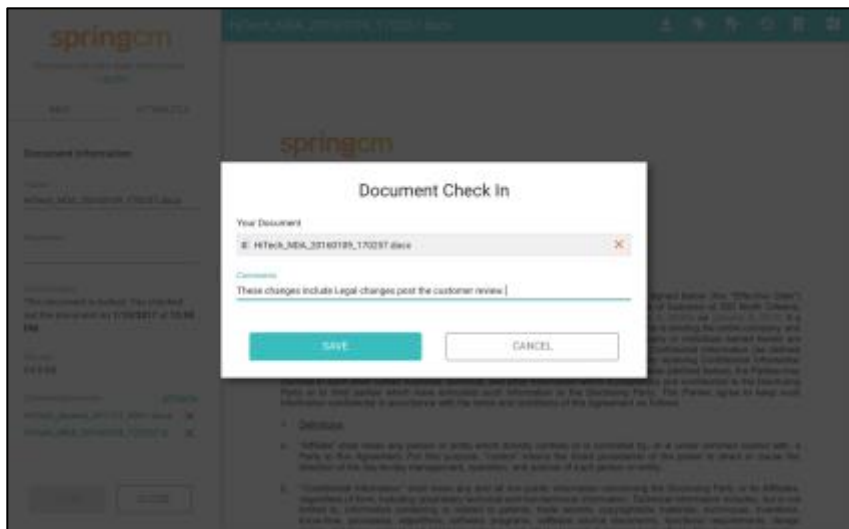**Upgrade to File It is required by April 15, 2017**
Continuing an initiative completed in November 2016, SpringCM wants to ensure that our Salesforce customers can take advantage of new functionality, bug fixes, and overall improvements. We expect that our customers upgrade to this version of File It by April 15, 2017. Any Salesforce orgs that have not been upgraded to this version of the package by this date will be automatically deployed via Salesforce push update processes.

New Document Preview

In the summer of 2016, we previewed a new, responsive page for viewing and working with documents in your SpringCM account. This new preview page will soon become the default interface for interacting with your content in SpringCM. As we look at the new preview, we are optimizing each interaction making it simpler to complete.

Improved Check out and Check In process

We have streamlined the process of checking out a document and uploading a new version.
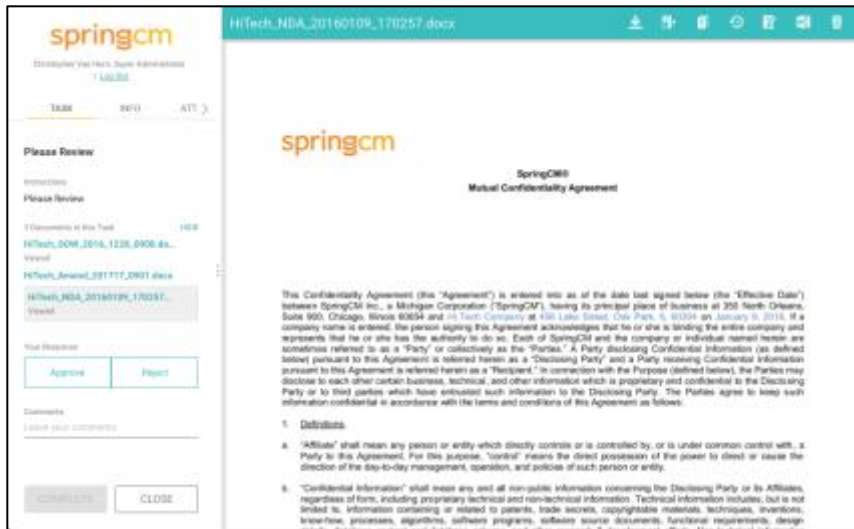
Relating documents

From the new preview, you can now easily relate documents like the MSA, NDA, and SOW to each other.

Working with multiple documents in a workflow

We have made it even easier for you to see other documents that are associated to the task. Completing a task with multiple documents has never been easy.

Please reach out to Customer Success or your Account Executive if you are interested in looking at the new preview.

Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **API:** The native document size and PDF document size are returned for the document.
- **Account preference added to set the default behavior for Return to Inbox:** A new preference (Set the value for Return to Inbox flag for all users in the account) has been added that allows the Administrator to set the default behavior when loading a new workflow item.
- **New Event Document Deleted**
  - A document deleted event has been added when creating a document rule. This event will be fired when a document is deleted or moved to the Trash. The event does not fire when a folder containing a document is deleted or moved to the Trash.
- **Workflow**
  - A new step, called Append Text Document has been added that allows you to append data to a CSV or existing Text document.
  - The HTTP Client step can now use mutual TLS authentication for the outbound connection.
  - The Create or Upload Document step has been updated to include a Cancel output path.
    - When the user completes this stuff, the user has the option of selecting *Cancel: stop building this document.*
    - A new output path Action Canceled has been added. *If this output path is not defined or no blank output path is defined, then your workflow may stop if the user selects Cancel. Please ensure that you update your workflow to account for this change.*
- **External Review**
  - When adding other documents to send out for external review, it is now easy to see documents that are already checked out.

Fixes

Summary	Component
Fixed an issue where the recipient hint text takes more than two lines when sending a document out for External Review.	External Review
Fixed an issue where sending a document out for external review that has an apostrophe in the name returns an error.	External Review
Fixed an issue where searching on the text of a copied document does not return the right result.	Search
Fixed an issue where the Create or Upload Document step does not write history to the document	Workflow
Fixed an issue where File It goes into mobile view on screen resolution of 1024 x 768, hiding necessary buttons	Salesforce

Known Issues

- 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.
- When authenticating Sync, Edit, and Scan for Window you may see a JavaScript error. This error can be clicked through to complete the authentication process.

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