



springcm

Release Notes

July 2015

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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.

Please visit our Trust Site for more information about scheduled downtime for this release and other upcoming maintenance windows: <https://trust.springcm.com/>

End of Life Announcements

In January 2016, SpringCM will no longer support version 9 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.



Enhancements

Track It™ for Deal Visibility

SpringCM customers are looking for more visibility into their running document workflows. In close collaboration with our end users, SpringCM has created Track It, a new mobile app that provides users with unprecedented visibility into the current state of any document in motion.

Track It will be available in Salesforce1 and works out of the box with any object that is configured to use SpringCM's File It™. In Track It, a user clicks into an *active documents* list to view an *activity board* showing all workflow activity for a particular document in motion.

The Active Documents list and the Activity Board will provide visibility into the current stage of the workflow, including:

- Who is responsible for the next action
- The task that was assigned
- The date this task was assigned
- The due date of the task
- Whether the current assignee has viewed the document

The app launches to show a list of active documents in the current folder or subfolder(s). An "active document" is one that is currently part of an active workflow that has tracking data enabled to capture information around human steps.

The Track It Activity Board also provides visibility into past activity in the workflow, including:

- Who took the action
- The output of the step (the action taken)
- The date the step was completed
- Comments (if any)

Users can scroll through the list and have the option to expand steps that hold additional information (e.g. the workflow user's comments)

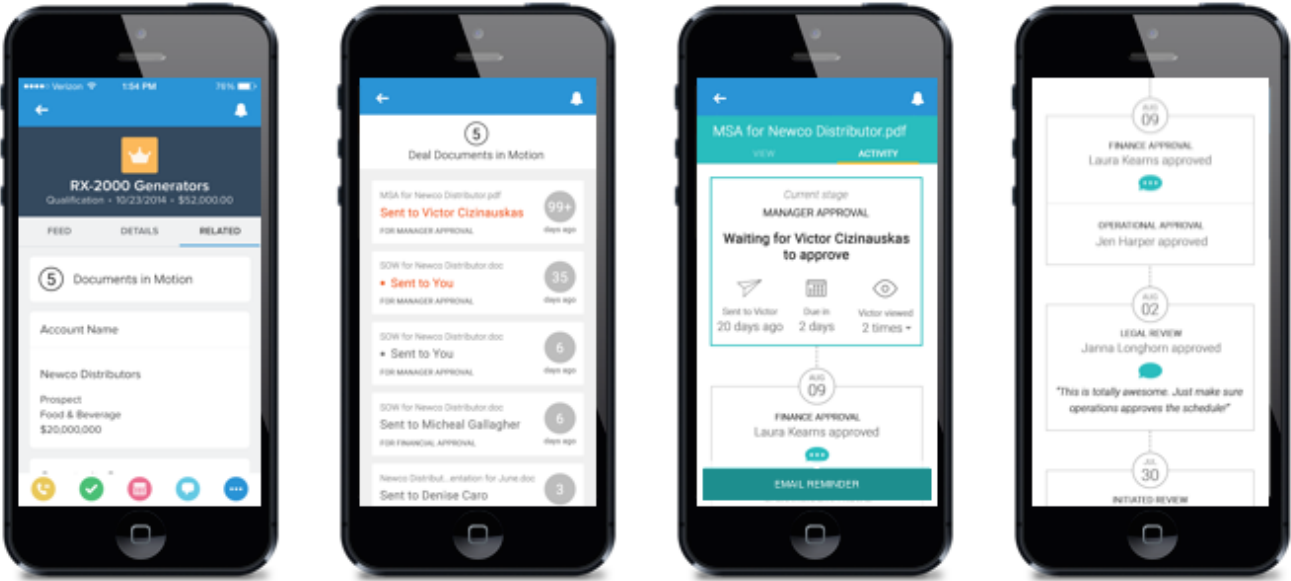
With a single click from the Activity Board, the user may send an email to notify users about pending or overdue actions.

Track It is built entirely on SpringCM's REST API, released earlier this year and leverages a growing UX Component Library. While this initial release is aimed at Salesforce customers using Salesforce1, Track It will be available outside Salesforce as a standalone mobile app and as a native feature for SpringCM platform customers.



Please contact your SpringCM representative for more information on getting access to Track It.

NOTE: Track It is only capable of displaying activity for properly configured SpringCM workflows. This feature must be enabled for the customer’s account and optionally enabled per workflow.



Editions

Available Via

Available To

Business		Web UI		Guest	
Enterprise	X	Salesforce1	X	Full Subscriber	X
Premier	X	Mobile		Administrator	X

Desktop Apps

External Review

Completing reviews with outside parties is a critical step in any approval process where internal and external parties are collaborating around key documents. This is especially true for customers working with Contracts and other agreements.

In the July Release, SpringCM introduces an entirely new way for you to collaborate with your external customers, vendors, and partners. The new External Review process lets you share,



capture feedback, and even redline important documents with 3rd parties - all without using email attachments.

Our customers have expressed these particular challenges in using email attachments:

- No versioning of documents as they go back and forth
- Not locking documents while out for review
- No history of activity in the document's audit trail
- No way to automate emails as part of larger review/approval process
- No due dates or way to expire external review requests
- Nightmares when emails with attachments are forwarded to other parties
- No easy way to notify interest parties about the status of reviews in progress
- No visibility into who has the next action and alerts if things are falling behind

SpringCM has worked with its customers to revisit the entire external review process and has developed a powerful alternative to the challenges and pain associated with passing email attachments back and forth.

The improvements can best be described using a set of personas representing the parties involved in a typical External Review process:

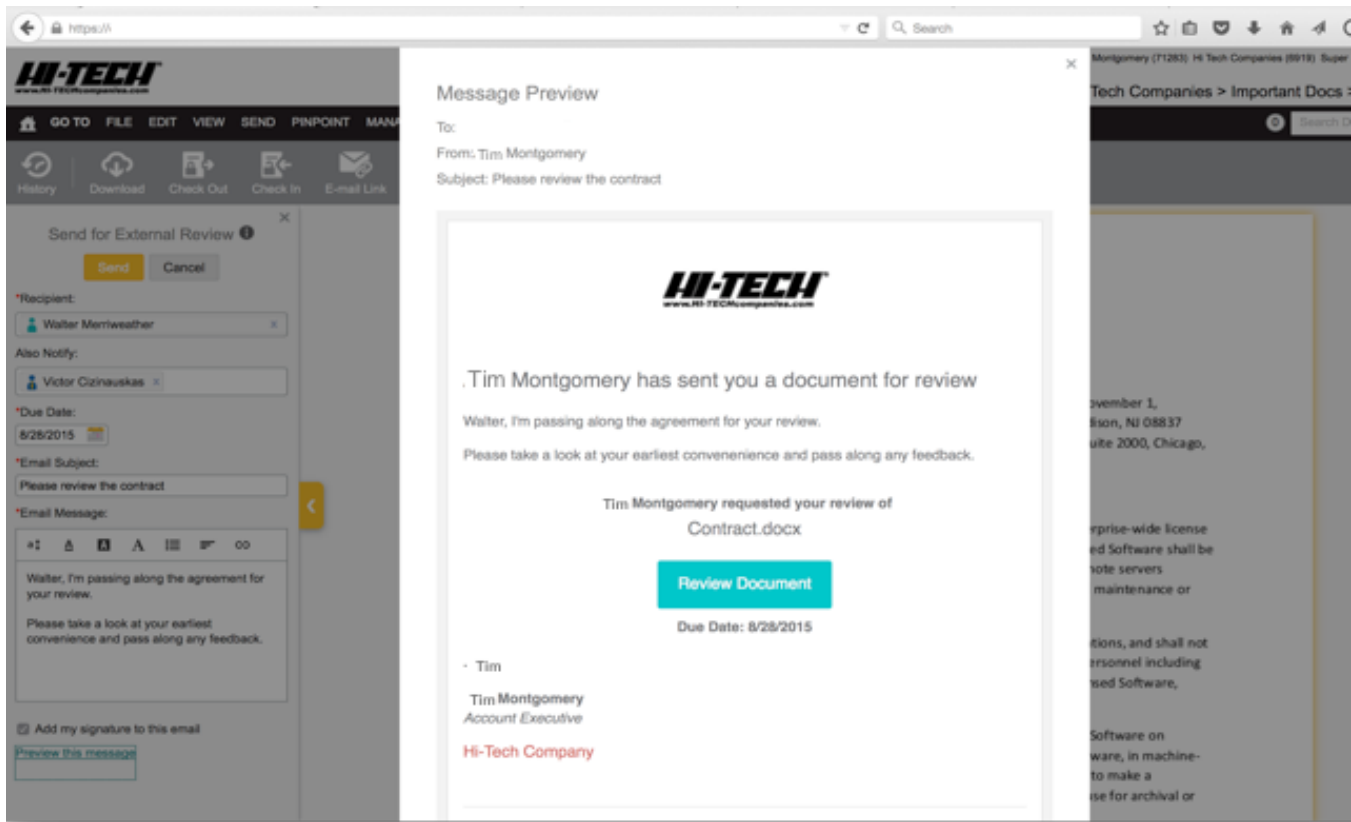
- **Tim** is a SpringCM user looking to have his customer accept the terms of a particular agreement like an NDA, MSA, or Statement of Work.
- His external counterpart, **Walter** is not a SpringCM user and routinely communicates with Tim over email.

Starting the Review

Tim can start the External Review process for a document manually in the browser although the activity can also be started as part of an automated workflow or through SpringCM's API. As Tim is preparing to send his document external review, he can:

- Select Walter by name from his company *address book*. Tim can only select a single recipient.
- Optionally add 1 or more recipients, SpringCM distribution groups, or SpringCM security groups as *watchers* who can follow the progress of the review
- Use a *rich text editor* for composing a message to Walter and viewing the custom branded email before clicking Send
- Set a *due date*
- Add his personal SpringCM signature to the email

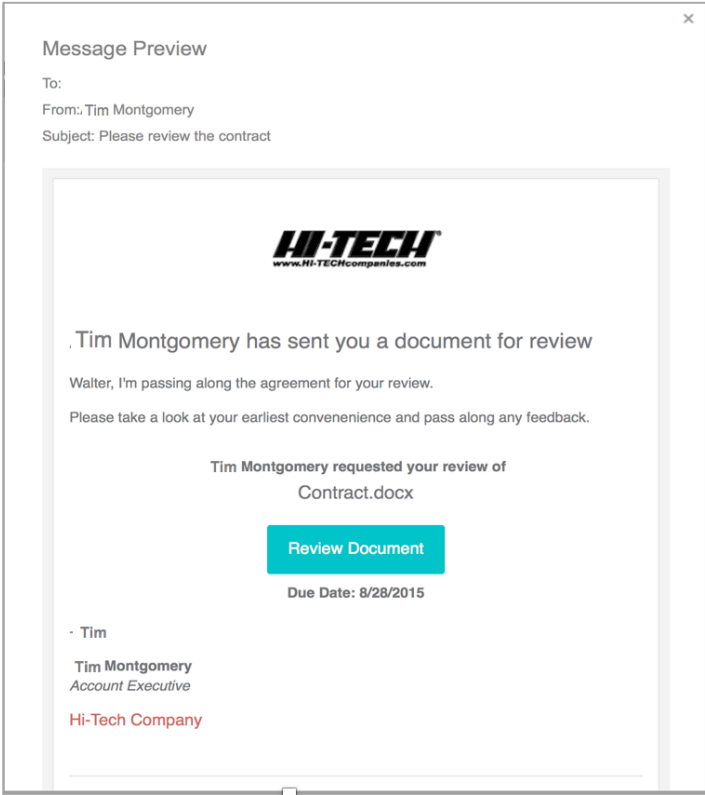




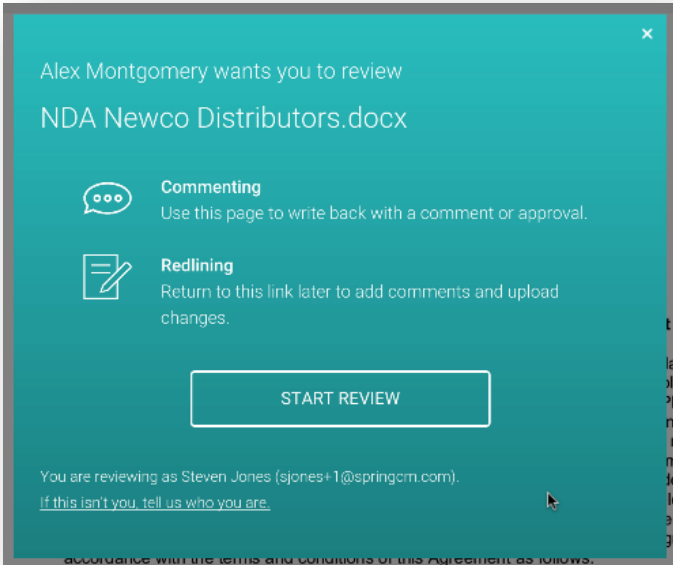
In addition to a branded email that helps Tim present himself and his company more professionally, Walter will also be greeted with a nicely-formatted, branded page that makes it easy for him to complete his tasks.

Completing the Review

Walter begins by clicking a button in Tim's email to navigate to a branded page where he can review the document, reply with comments, and/or upload a redlined version, if necessary. If Walter needs to complete the review with a redlined document, he must select a document of the same type. He will receive a warning message if he does not select a document of the same type.



Walter receives a branded email from Tim with a clear call to action for completing the Review



Clicking on the button in the email invite from Tim brings Walter to a page with instructions on how to start the Review



Tim, Walter, and any watchers will receive an email when Walter completes the external review process.

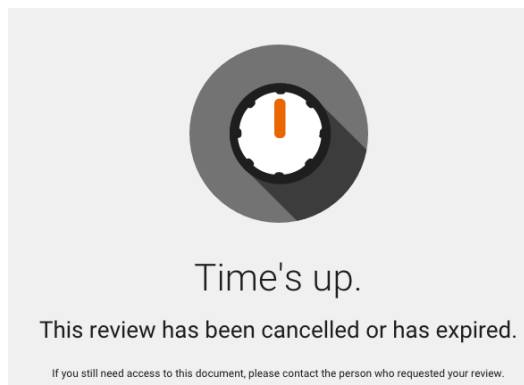
The web page remains available until the External Review process expires in order to provide a reference point for communication during the contract process.

As the process ensues, Tim and any *watchers* will receive notifications any time there is activity around the Review process including:

- When the activity is completed
- When the activity expires
- When the activity is cancelled

Canceling External Review

Only Tim or a Super Admin can cancel a document that is out for external review. When the Review is cancelled, Walter receive an email letting him know it has been cancelled. Tim can cancel the review by selecting the Cancel External Review action in a context menu or in the Edit Menu. If the review has expired or cancelled and Walter tries to go to the web page, he is provided an experience that makes it clear that the review is no longer valid.



History Messages

During the review process, SpringCM keeps track of all the activities that take place. We have added a next added new history filter for External Review activities and provide more detailed information as each activity occurs. New history messages are recorded.

- When external review starts
- When it is completed and how it completes
- When it expires
- When it is cancelled
- When a user accesses the page
- When a user downloads the document



General Information

Name: [MSA for Burlington Textiles 20150519.docx](#) Uploaded By: Herman, John
 Pages: 1 Created Date: 7/23/2015
 Description: Created Time: 7:29 AM

In Workflow:

External Review

TOTAL ITEMS: 30

PAGE: 1 SHOW: 50

User	Action	More Info	Comment	Time Stamp
Herman, John	External Review Completed (with a new document and comments)	External review completed as Walter Meriweather (cvanhorn@springcm.com) from IP Address: 38.122.189.66 with new document MSA for Burlington Textiles 20150519--Walter Edits.docx and comments: I have attached my changes. Please review and adjust based on these minor changes and we will be good to. .		7/23/2015 7:29 AM
Anonymous	External Review Native Document Download	The document from the external review public page was downloaded from IP Address: 38.122.189.66.		7/23/2015 7:28 AM
Anonymous	External Review Public Link Preview	The external review public page was accessed from IP Address: 38.122.189.66.		7/23/2015 7:27 AM
Herman, John	External Review Initiated	This document has been sent for External Review to cvanhorn@springcm.com and is due on 7/31/2015 and ddosen+jsales@springcm.com will be notified of its progress.		7/23/2015 7:27 AM

Advanced Workflow

External Review can be initiated during your business process in two ways from an advanced workflow.

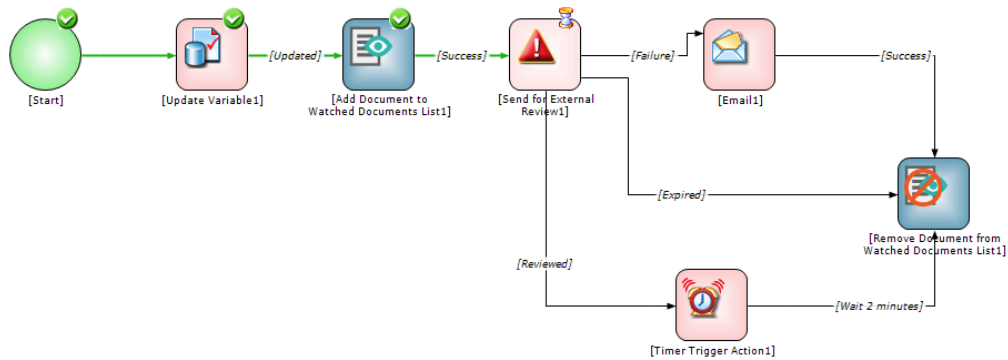
- Send for External Review

The Send for External Review workflow step allows the document to be sent to the reviewer in an automated fashion. In this case, Tim does not need to review the document before sending it out. A new Send for External Review workflow step has been introduced in conjunction with this release. This step aligns with the new process and incorporates new output paths that align with the process as well as incorporates the new *Watchers* capabilities. New business processes that will utilize this step should use this new workflow step.

If your organization has implemented a workflow that utilizes the legacy Send for External Review workflow step, then it will continue to work as it does today. Over the next 6 months, SpringCM will work with you to migrate from the old Send for External Review step to the new workflow step.

If you are using the old Send for External Review step, you will see a warning indicator in the Workflow Designer or the Process Monitor. This indicator only means that you are using an old step; it does not mean that there you have an issue to correct or that the workflow is broken.





- **Review and Send for External Review, Wait for External Review**

The Review and Send for External Review step allows the sender (Tim) to review the document prior to sending it out for external review. Here, Tim can change the recipient, the due date, the subject and message prior to sending it out to his customer, prospect, or vendor.

This step works in tandem with the Wait for External Review step. This step need to be incorporated into your workflow after the aforementioned step completes and allows the workflow designer to trigger downstream processes based on whether the step

- completed with a document
- completed without a document
- cancelled
- expired
- was sent to an invalid recipient

REST Web Service

SpringCM has also extended our REST API to include a web service to start an External Review process programmatically. This call only supports the new External Review feature and is only used for sending . No changes or cancelling an external review process is supported.

Inflight documents out for External Review

Documents that are currently out for External Review at the time of this release will continue following the old process. This means that for anything this currently out for review will complete via the email attachment process. Any documents sent out for external review after the release will utilize the new send and complete interactions.



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

Document Package Builder

Starting with the July Release and continuing on for the next few releases, SpringCM will be enhancing its *document generation* features to address a number of usability challenges, especially related to the management of MS Word and XML templates.

In the July Release, we have introduced several methods for including common paragraphs, terms, and clauses in your templates. This makes it easy to make changes to your text without having to touch your MS Word/PDF templates or your configuration.

Document Generation Administrators can now create paragraphs as separate text or html documents and managed them like any other document in a SpringCM folder. Alternatively they can use the new, native SpringCM Extension Term (or SXTerm) document type to manage a number of related terms in a single document.

New Extraction Sources

Four new extraction sources are available for merging data into MS Word or PDF templates. Admins can now specify the following values to merge data from these sources:

Type	extractionSourceID	Example sourceIdentifier
Text	SCMPlainTextFile	/Admin/Clauses/SimpleTextClause.txt
Terms	SCMTermDocument	/Admin/Clauses/Indemnity.sxterm?option=Fallback
JSON	JSONExtractor	Employees.JohnSmith.startDate
XML	XMLExtractor	//Employees/JohnSmith/startDate



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

Desktop Apps

Document Reminders

Building on the enhancements released earlier this year, the Document Reminders feature has been updated again, this time to allow SpringCM Administrator to create new Reminders as Smart Rule *Actions*. This makes it easy for customers to automate the creation of Document Reminders based on other important activity in the account such as a document being checked in or returned from an External Review or eSignature.

- The Smart Rule Action provides a list of valid Reminder Templates that contain at least the minimum required parameters for new Reminders.
- Reminder dates will be calculated using one of the two date offset methods (apply date or date attribute value)

The screenshot shows a dropdown menu with the following options: Assign Attribute Group, Assign Attribute Value, Bulk Attribute Import, Bulk Import Users, Copy Document, Create Folder, Move Document, Notify Web Service, Rename, Run Rule, **Schedule Document Reminder** (highlighted), Send Email, Set Security, Start Workflow, and Update Description. Below the menu is a table with the following content:

Remove	Order	Status	Action	Details
X		Valid	Schedule Document Reminder	30 Day Reminder

At the bottom of the interface are buttons for 'Save', 'Cancel', and a link for 'Analyze'.

Admins can use Smart Rules to apply new Reminders to documents using existing Reminder Templates

Smart Rules also now support the ability to fire a rule based on a new event called *Document Reminder Processed*. This extends the power of using Document Reminders to automate activities and document business processes in SpringCM.

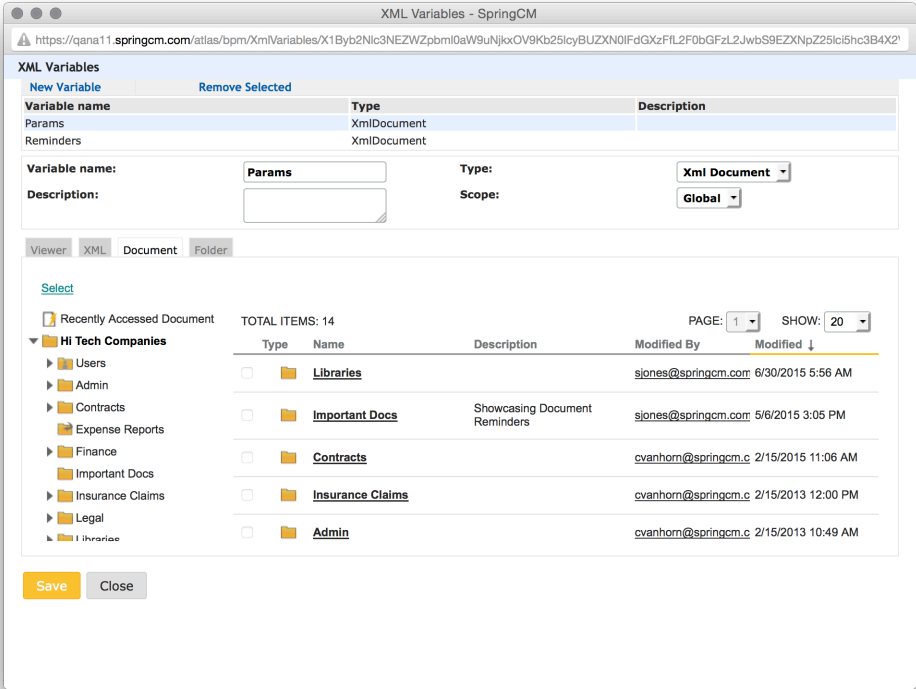
Administrators can trigger new Smart Rules when a Reminder is processed

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



Workflow Improvements

- The Start Step in SpringCM’s Advance Workflow Designer has presented technical challenges for many new users. In the July Release, we have made it much simpler to configure a new workflow by dramatically reducing the steps required to get started. In addition to passing in custom xml to start a workflow process, the designer can now bootstrap the workflow by selecting a specific document or folder.



Workflow Developers can quickly bootstrap a new workflow by selecting a document or folder in the repository

- The Send Email workflow step now sends a single email to all valid recipients when called through an Advanced Workflow. The step will fail if no valid recipients are found. Prior to this release, the step sent a separate email to all recipients.

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



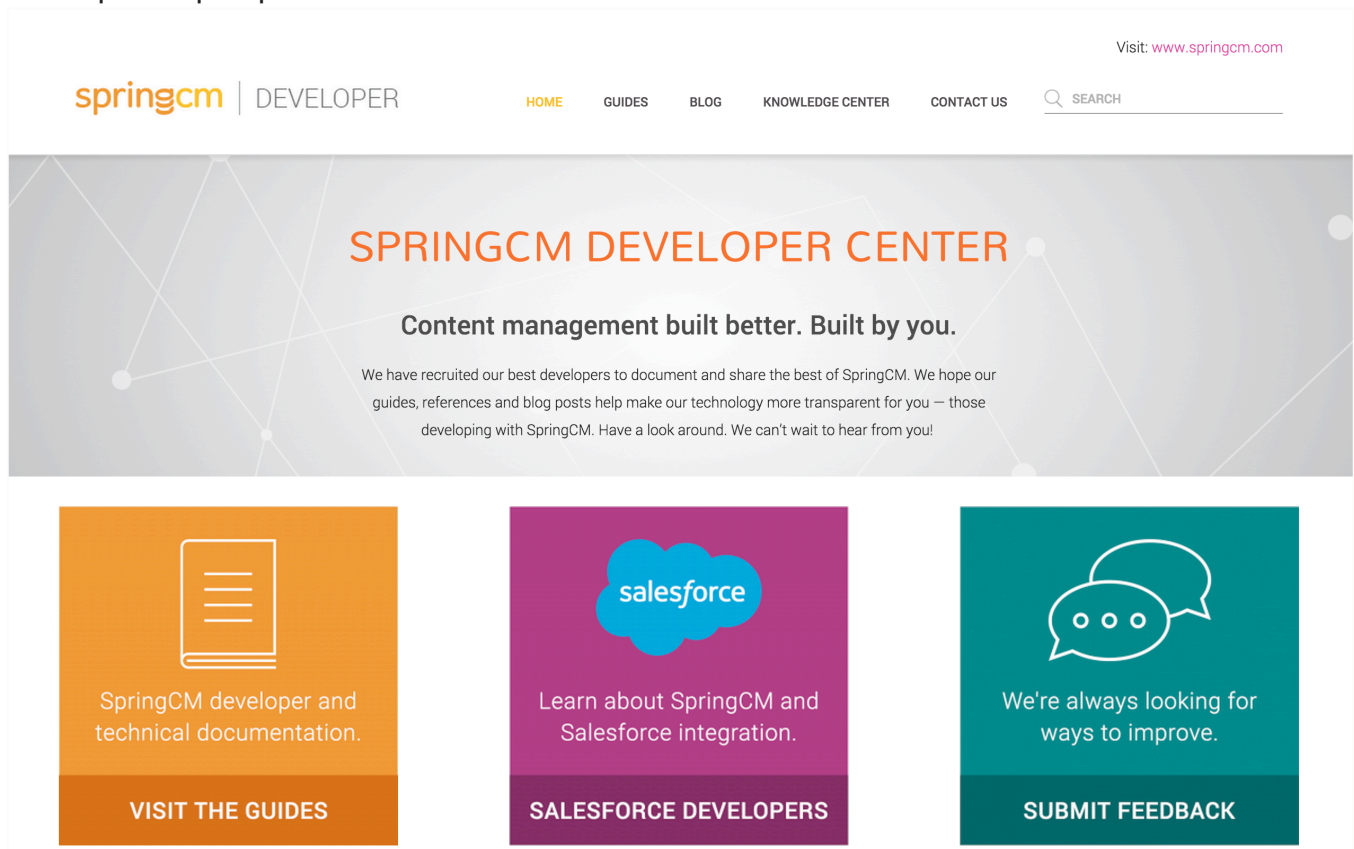
REST Application Programming Interface (API)

With the July Release, we have made the following updates to the REST API:

- There is a new endpoint for obtaining a URL to DocLauncher, the successor to SpringCM's Document Package Builder to be formally released later in 2015. Additional information about this endpoint as well as examples on how to use the API are available on SpringCM's Developer Center.

Developer Center

SpringCM is proud to announce the launch of our new Developer Center, a site built for our technical audience to help guide them in integrating and building custom solutions on the SpringCM platform. SpringCM has hosted the [Knowledge Center](#) for quite some time which offers guidance on configuring SpringCM from an administrative perspective. We are now happy to complement that with the Developer Center, which will focus on SpringCM from a development perspective.



The screenshot shows the SpringCM Developer Center website. At the top right, it says "Visit: www.springcm.com". The navigation bar includes "springcm | DEVELOPER", "HOME", "GUIDES", "BLOG", "KNOWLEDGE CENTER", "CONTACT US", and a search bar. The main heading is "SPRINGCM DEVELOPER CENTER" with the tagline "Content management built better. Built by you." Below this, a paragraph reads: "We have recruited our best developers to document and share the best of SpringCM. We hope our guides, references and blog posts help make our technology more transparent for you – those developing with SpringCM. Have a look around. We can't wait to hear from you!" There are three main content blocks: 1. An orange block with a document icon, text "SpringCM developer and technical documentation.", and a button "VISIT THE GUIDES". 2. A purple block with the Salesforce logo, text "Learn about SpringCM and Salesforce integration.", and a button "SALESFORCE DEVELOPERS". 3. A teal block with a speech bubble icon, text "We're always looking for ways to improve.", and a button "SUBMIT FEEDBACK".

The SpringCM Developer Center launches in July

This first release focuses on the SpringCM REST API, SOAP API, and SSO integration capabilities. While the SOAP API has been around for several years, the REST API was officially launched in June of 2015 and was purposely developed to align with modern



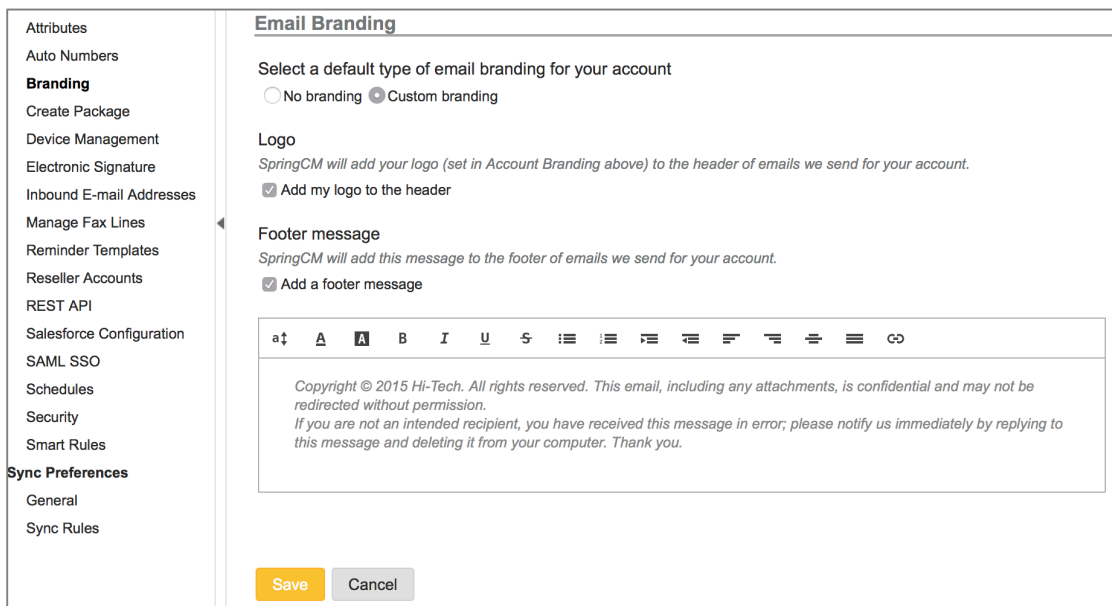
standards and capabilities. The REST API will be the primary focus for future enhancements and already exposes additional capabilities not seen in the SOAP API such as “Sharing”, the “Workflow Inbox”, and “Document Reminders”. Look for more to come throughout the remainder of 2015.

In addition to the Guides, we are also launching the SpringCM Tech Blog. The tech blog will contain posts focusing on newly released features, best practices for working with SpringCM, and experiences/guidance from our tech team that we have gained in building the SpringCM platform.

Other Enhancements

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

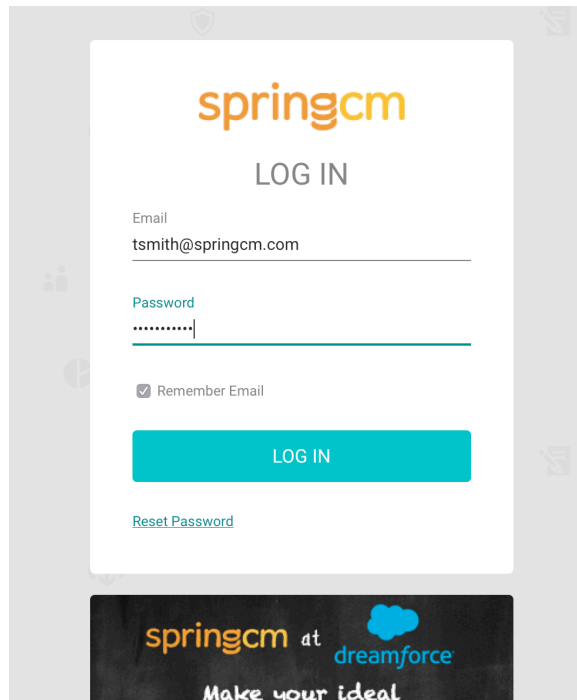
- **Email Branding** – In recognizing that SpringCMs’ customers use the platform for communicating and collaborating both internally and externally, we have updated the branding features to allow Administrators to set custom footer messages and to include a custom logo in all outbound emails.



In the updated Branding page in the Preferences section, Administrators can create a custom footer message for all outbound emails

- **New Login Page** – To help support a single, more responsive login page used on desktops, mobile devices and in 3rd party apps like Salesforce.com, we have rebuilt the all-important login page to better accommodate different environments.





The new SpringCM login page is optimized for desktop and mobile devices

- **Premium Feature prompt** – We have removed the in-app promotion of disabled features so that clicking on a feature not available in the user’s account no longer prompts the user to upgrade.
- **Large Folders** – Through research, we discovered that when users are tasked with browsing through folders with an unusually large number of items, they are very rarely successful in finding what they are looking for. They start paging through the first few hundred lines and then abandon the task and choose to use search. To provide a better experience, we will no longer show the content of folders with greater than 10000 items. Instead, we post a message in the user interface that coaches them to use search to find what they are looking for. This also provides the added benefit of reduced load times for folders across the system.
 - When the user attempts to browse a folder that contains larger than 10,000 items (documents, folders, E-forms, links), a message will be returned, encouraging use of search to find the document or folder. After selecting the search link in the message, the user will be taken to the Advanced Search page where filters can be applied to find documents or folders.



Initech / Contracts /

Staging

TOTAL ITEMS > 10000



PAGE: 1

SHOW: 20

<input type="checkbox"/>	Type	Name ↑	Description	Modified By	Modified	Actions
--------------------------	------	--------	-------------	-------------	----------	---------

There are more documents in this folder than SpringCM can display at once, please [search](#) to find your document.

TOTAL ITEMS > 10000



PAGE: 1

SHOW: 20

- When attempting to browse a folder than contains more than 10000 items via FTP or SFTP, a permission denied message will be returned. In this case, you can bypass this error by going directly to the document or folder.
- When attempting to browse a folder than contains more than 10000 items via WebDAV, a permission denied message will be returned. In this case, you can bypass this error by going directly to the document or folder.
- **Document History** – Accessing Document History has been moved from the Edit Menu to the View Menu.
- **DocuSign Envelope Download** – We have added a feature that allows a user to download the contents of a DocuSign envelope. Prior to this feature, Only the 1st document from a DocuSign envelope was presented to the user. Now all the files from an envelope are available for use.
- **Single Sign On** – To maintain environmental parity, a configuration change is being made to the SpringCM Service Provider information used in the implementation of SAML SSO. If your account is in the Las Vegas data center (NA21), you will need to make changes. More information can be found [here](#).



Fixes

Summary	Components
Fixed an issue where a document sent out for external review via workflow was not cancelled properly when the active workflow was aborted.	Workflow
Fixed an issue where a document sent out for signature via workflow was not cancelled properly when the active workflow was aborted.	Workflow
Two Actions related to the deprecated Expiration and Reminder feature that were previously available on the Notification Preferences page in the user's My Preferences section have been removed. The <i>Document Expiration Notice Sent</i> and <i>Document Reminder Notice Sent</i> actions are no longer available on this page.	Expiration and Reminders (deprecated) User Preferences
The legacy stock report Expirations and Reminders is no longer visible in the Reports section as the feature was removed in the June 2015 Release.	Reports
Fixed an issue where special characters were not handled properly when they were used in File It.	Salesforce (File It)
Fixed an issue where Users were not able to create new XML variables	Workflow
Fixed an issue where downloading a document without an ACCEPT header from Salesforce returned the preview image.	Web Services (REST API)
Fixed an issue where copying a Salesforce folder would also copy its resultant attributes.	Salesforce
Fixed an issue where a document sent out for signature via Echosign would not always follow the specified order.	Electronic Signature (Echosign)
Fixed an issue where creating a new smart rule after selecting the initiator and clicking the Add Action link would return an error.	Smart Rules
Fixed an issue where expanding on Document Reminders recipient users or groups returned a 404.	Web Services (REST API)

Known Issues

- When completing External Review from within IE9, it appears that you are able to upload a document via Drag and Drop.
- When external review has been completed by a reviewer, the document history message may not display all of the comments.



- If you have a custom menu item that follows History, then it may move to the View Menu from the Edit Menu.
- If a document has been sent out for external review to an invalid email address, the document checkout will not be cancelled. The sender will also not receive an email signifying that a valid recipient was not found.
- If a document has been sent out for external review via the Review and Send for External Review workflow step or the Send for External Review workflow step to an invalid email address, the workflow step will not successfully complete. The workflow step will be left in a Waiting state.

