

springcm



Release Notes

July 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

Microsoft Internet Explorer version 10

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>.

pub.springcm.com

Pub links will be deprecated in July 2016. If you need to allow access to a SpringCM document via anonymous access, please use [SpringCM Share](#). You can also create share links programmatically via the [REST API](#).

Other Announcements

File It Upgrade program

SpringCM has recently released [File It 4.4](#). This release includes a host of new features designed to make it easier for the Administrator to [configure File It](#). SpringCM requires that all customers who are using File It upgrade to version 4.4 or greater by July 22, 2016 in their Salesforce Sandboxes and November 11, 2016 in their Salesforce Production orgs. **If you have not upgraded your Sandbox by July 22, 2016, SpringCM will upgrade it for you.** For all of the details, click [here](#).

SpringCM Desktop Applications

The current endpoints that SpringCM desktop apps (SpringCM Edit, SpringCM Scan, SpringCM Sync, and SpringCM Mobile for IOS) are expected to be deprecated on November 12, 2016. In early August, SpringCM will be releasing new versions of these applications that use new end points. Please work with your end users to ensure that these applications are updated after this release is made available. Be on the lookout in the coming month at trust.springcm.com for an announcement highlighting that new releases are available. If your end users do not upgrade these application by this time, you may find that the applications will stop working.

Enhancements

Doc Launcher Forms – Beta

With this release, we have expanded on the success of the Doc Launcher Forms feature and introduced some exciting new capabilities and refinements. Using a Doc Launcher Form with Salesforce is now a simple and elegant process. New fields like the Number and Currency Field allow you to properly format this data in the generated document.

Linking to Salesforce

Integrating a Doc Launcher Form with Salesforce has never been easier. The first step when creating a new Doc Launcher Form is to wire it up to Salesforce. Now, when you create a Doc Launcher Form, we now provide you a drop down list of the Salesforce objects that you are using with SpringCM.

The screenshot shows a 'New Form Configuration' window. At the top, the title 'New Form Configuration' is centered. Below it, there is a 'Form Name' field containing 'Salesforce NDA'. A checkbox labeled 'Use this form in Salesforce' is checked. Below the checkbox is a warning message: 'A form can only work on a specific Salesforce Object. Be careful when selecting an Object because you won't be able to change this in the future.' Underneath is a 'Select Salesforce Object' dropdown menu. The dropdown is open, showing a list of objects: 'Account', 'Case', 'opp_Contract__c', and 'Opportunity'.

Adding a new field (Text Field, Text Box, Date, Number, and Currency) and linking it to Salesforce has been dramatically simplified. No longer do you need to know Salesforce syntax to map to the right field. Now, it is as simple as picking from a list of fields. These fields are filtered to only show the fields that make sense for the type of field that you are adding.

Properties: Date

*Field Name
SLA Expiration Date

Field Value

*Default Value
Link to Salesforce field

*Which field would you like to use?
SLA Expiration Date (SLAExpirationDate__c)

*Date Format in Microsoft Word

Settings

- Visible
- Required
- Read-Only

Choose Salesforce Field

Sort by: Name (ascending)

Search within Account

Salesforce Objects

- Account
 - CreatedBy (User)
 - LastModifiedBy (User)
 - MasterRecord (Account)
 - Owner (User)
 - Parent (Account)

- Calculated Date (Calculated_Date__c)
- Created Date (CreatedDate)
- Last Activity (LastActivityDate)
- Last Modified Date (LastModifiedDate)
- SLA Expiration Date (SLAExpirationDate__c)
- System Modstamp (SystemModstamp)

CHOOSE

Number

Number fields ensure that numbers and percentages are properly formatted when merged into your contract document. When linking to a Salesforce field, only number and percentage fields are shown in the field chooser ensuring that you pick the right type of field. When you define the field, you have the option to include the decimals and a percentage.

Properties: Number

*Field Name
Percent Completed

Field Value

Link to Salesforce field

Default Value
45%

Settings

Show decimal places (.00)

Show percentage (%)

Visible

Required

Read-Only

Currency

Currency fields ensure that dollar amounts are properly formatted when merged into your contract document. When linking to a Salesforce field, only currency fields are shown in the field chooser ensuring that you pick the right type of field. When you define the field, you have

the option to include the decimals and to show the Dollar Sign.

Properties: Currency

*Field Name
Contract Dollar Amount

Field Value

Link to Salesforce field

Default Value
\$250,000

Settings

Show the Dollar sign (\$)

Show decimal places (.00)

Visible

Required

Read-Only

Miscellaneous Improvements

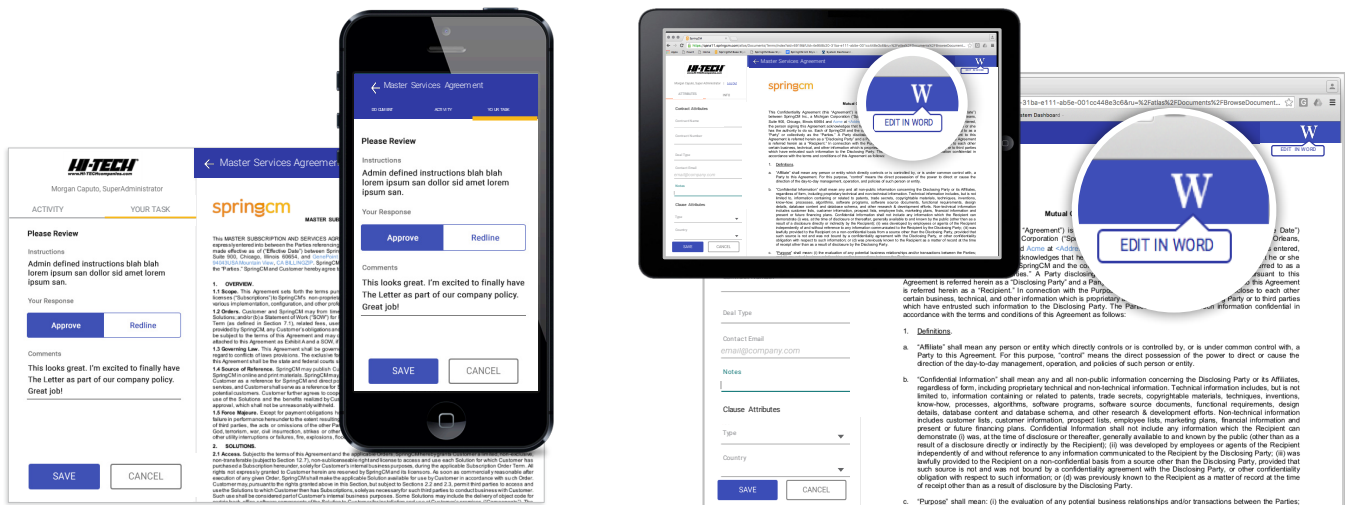
- **Adding fields in line in the form is now easier:** A new field will be added below a selected option
- **Adding options in drop down and radio button fields:** A new option will be added below a selected option
- **Validation improvements:** Field level requirements now show in-line in the Doc Launcher Form, making it easier for you to correct any issues before saving the Doc Launcher Form.
- **Merge Tag improvements:** The default merge tag has been updated to ensure that if an optional field is not entered that the content control is suppressed in the Word document.
- **Improved spacing in the Form Preview page:** The Form preview now closely aligns with the end user experience.
- **General usability improvements:** A host of minor improvements have been made that improvement the overall usability of Doc Launcher Forms.

Doc Launcher Forms has been opened up to all of customers. If you are interested in trying out this new feature, please reach out to Customer Support or your Account Executive and they can enable this feature for you. For additional information, see the [Knowledge Article](#).

Doc Explorer for Mobile Approvals

Beginning in July, we will introduce an exciting way to work with your documents in your SpringCM account. Our new Doc Explorer feature represents a fresh and modern approach to interacting with content. In the months ahead, you will see Doc Explorer evolve to support an incredible range of scenarios including:

- Tracking contracts or any document in motion for full visibility into ongoing reviews
- Completing workflow approvals from your smartphone
- Editing Office documents directly in the browser - even from a tablet
- Collaborating with others on the same document in real-time
- And more!



Complete workflow approvals and more from your desktop or smartphone

Edit natively in your browser using Microsoft Office 365 without having to download the document

In this release, customers can use Doc Explorer to complete workflow tasks assigned to them. The fully responsive Doc Explorer page will adapt to any device making it effortless to review and approve contracts and other documents going through Advanced Workflow.

With Activity Tracking enabled in the account, users will stay on top of documents in motion and quickly respond to tasks assigned to themselves or others in the workflow.

Doc Explorer is currently being piloted with customers through our SpringCM Labs program. If you would like to participate in a pilot program, please reach out to us or visit <https://knowledge.springcm.com/joinscmlabs> to sign up.

Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **Doc Launcher Filters** – After initial testing with customers, SpringCM is swapping the order of the modals used to filter templates in Doc Launcher. Filters were introduced earlier in the year as a way to tag and organize large collections of Doc Launcher templates. This change shows the full list of templates first and provides a convenient link to then filter the list using the tags pre-assigned by the SpringCM Administrator in Doc Launcher Config. See the [Knowledge Article](#) for more information.
- **Doc Launcher Validations:** When the end user fills out a Doc Launcher Form, required fields and any custom errors are now show in line on the form.
- **Doc Launcher Configuration and Forms:** To better connect the Doc Launcher Configuration admin experience with the related tasks of building the Doc Launcher Forms and Word/PDF templates, we have added convenient links to help the Admin navigate between the tools. From the Add/Edit Template modal, the Admin can click to open an existing Form Config File in another tab.
- **Suppress email notifications for portal users in the Address Book** – We have been hearing from some customers that the auto-generated notification email that is sent to users when they are enabled or disabled in the account can be confusing. This is especially true when those users are not aware that they are interacting with the SpringCM platform. In response, we have added an account-level toggle for Administrators to disable the email notifications when users are enabled/disabled or when their role changes. The notifications are and will continue to be “on” by default but now can easily be disabled by the Administrator when appropriate.
- **SAML SSO support for SHA256:** SAML SSO now supports SHA128 and SHA256 certificates.
- **Review and Send for External Review and Send for External Review Workflow step improvements:** Notification participants can now be separated by a |, ; or a , .

Fixes

Summary	Component
Fixed an issue where updating attributes on a document with required fields would not return an error.	API
Fixed an issue where a number greater than 10 million that was extracted from Salesforce using Doc Launcher would be returned in scientific notation.	Doc Launcher Forms

Fixed an issue where a number below 0 that was extracted from Salesforce using Doc Launcher would be returned in scientific notation.	Doc Launcher
Fixed an issue where the BACK and CANCEL buttons in Doc Launcher would drift off the modal when applying dozens of filter tags.	Doc Launcher
Fixed an issue where a workflow can not be resumed if there is no failure path is defined for a step where a workflow fails.	Workflow
Fixed an issue where setting folder attributes through workflow does not consistently set the attributes on child folders	Workflow
Fixed an issue where selecting multiple users from the user chooser on the Security page does not update all of th selected users	Security
Fixed an issue where a disabled SpringCM user does not get the external review email to start the process	External Review
Fixed an issue where the Review Completed On Date always uses US formatting.	External Review
Fixed an issue where selecting “Send for External Review” for a document that has been added to a Watch List does does not display the Send For External Review panel.	External Review
Fixed an issue where loading the Send for External Review workflow step with an apostrophe in the the email subject would prevent the preview from loading	External Review
Fixed an issue where a user could modify a value for a read-only attribute when using the Folder Attributes page	Folder Attributes
Fixed an issue where search results were failing for Japanese, Chinese or cyrillic characters in the search parameters	Search

Known Issues

- Copy Tag does not work in Doc Launcher Forms in Safari.
- The left hand panel in Doc Launcher Forms may scroll behind the Save and Close buttons. To correct this, resize the browser window.
- Setting the default value of a Date field to “use form submission date” reverts to “leave blank” in Doc Launcher Forms.
- Doc Launcher Forms are not included when creating a SpringCM package.
- Attempting to authorize SpringCM Mobile for Android may returns a system error.

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