

springcm



Release Notes

March 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>.

Document Links

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 stop working. 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.

SpringCM Mobile for Android

Due to waning customer demand and increased development and maintenance costs, SpringCM will be sun setting the SpringCM Mobile App for Android. At the end of April 2016, the application will be removed from the Google Play Store and Amazon Store. Customer may choose to continue using the current version of the application; however, SpringCM will not enhance or bug fix the application in the future.

Other Announcements

TLS 1.0 encryption protocol

The PCI Security Standards Council has extended the migration completion date from TLS 1.0 to a more secure version of TLS out from the original June 2016 date. We expect additional clarity from the PCI Security Standards Council in the next few months surrounding the migration date, at which point, we will firm up our TLS schedule.

SpringCM is not upgrading our infrastructure to support TLS 1.2 as originally planned in April 2016. While this is not occurring in April 2016, we recommend that you get started on this endeavor 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>).

File It Upgrade program

Starting in early April 2016, SpringCM will start working with our Salesforce customers to upgrade to the latest version of File It. As this initiative gets underway, we will be reaching out to our customer base in advance of this initiative. More information will be available on our [trust site](#) in the coming weeks.

Enhancements

Doc Launcher for uploading 3rd party documents and more

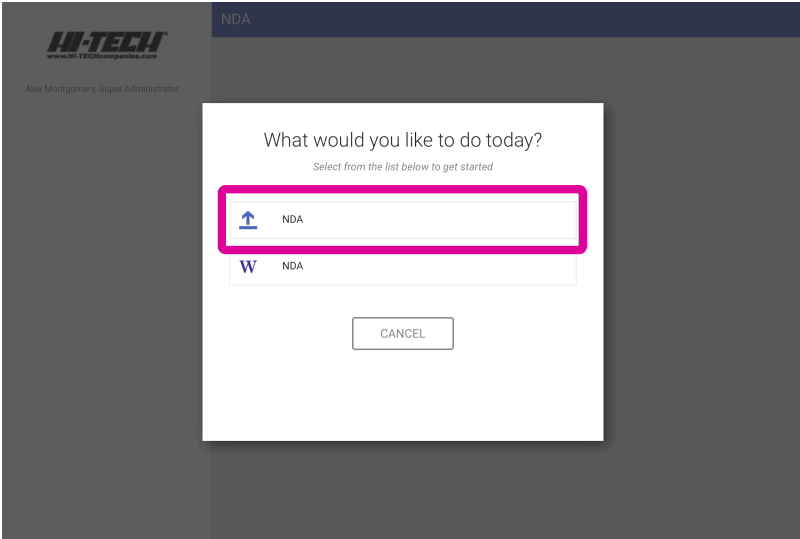
With the March 2016 Release, SpringCM has made another significant round of updates to Doc Launcher, one of the key platform components for starting Contract processes and other document workflows.

Upload documents to launch workflows

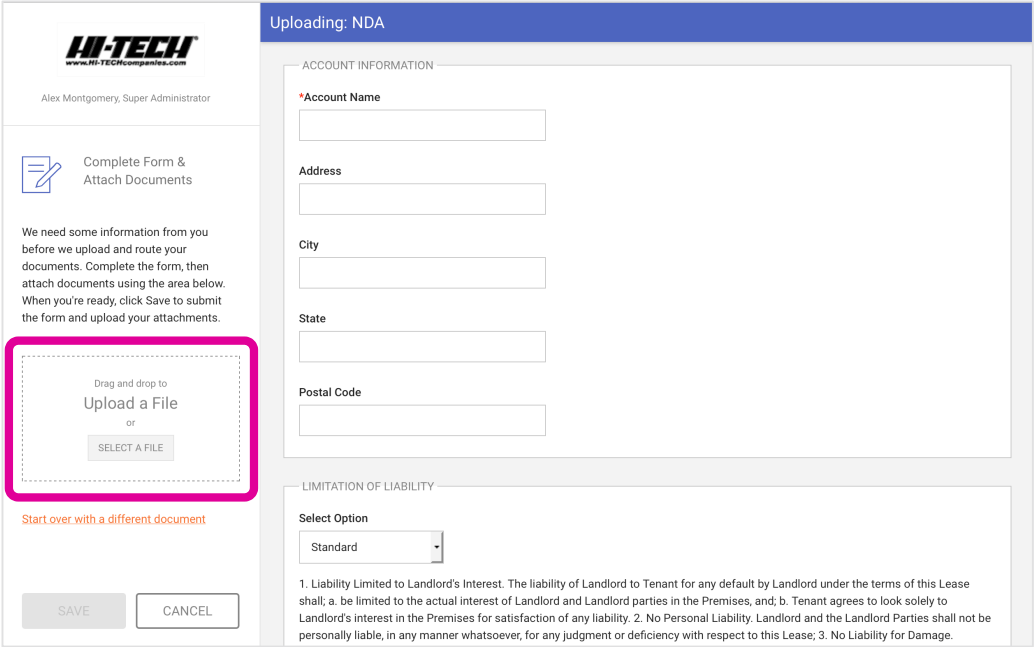
Until now, Doc Launcher was only used to generate documents and launch downstream workflows. For example, Sales Reps would start a new contract process using Doc Launcher to create NDAs, MSAs or similar agreements from pre-approved templates and then *launch* the generated document into a well-defined contract process.

This approach works extremely well for agreements that are created with your company's document templates. But we recognize that, in many cases, it is just as likely to have the same process launched with the other party's "paper". For example, your customer/partner/vendor may send you their version of a Non-Disclosure Agreement (NDA) to use in place of yours.

We began to see a common pattern and started exploring how we could use the same tools in SpringCM to handle either scenario. In working with our customers over the past weeks and months, we have enhanced Doc Launcher to accommodate uploaded documents so that your users can launch new workflows by uploading existing documents instead of generating new ones.



Users can now choose templates for uploading existing documents



These templates include a document upload component along with the familiar form

Doc Launcher Configuration improvements

To improve the overall usability of the Doc Launcher Configuration page, we spent time in this latest release revisiting this section of the Account Preferences and significantly enhanced the Administrator's experience. Our goal was to provide more information about each Configuration and simplify the task of creating and wiring up a working configuration in SpringCM or Salesforce. Specific improvements include:

- Each row in the grid provides details eliminating the need to re-open each Configuration page
- Automatic URL generation produces a valid URL for immediate use in SpringCM or Salesforce
- Single click *COPY URL* link to simplify pasting into custom toolbar or button



How To

For the full description of this feature and the latest How-To notes, visit the updated Knowledge Article at: <https://knowledge.springcm.com/doc-launcher>

NAME	LAUNCHES WORKFLOW	CONFIGURED FOR	CONFIGURATION URL
Contract for Signature	E-Signature Workflow	SpringCM (Contracts)	https://qana11.springcm.com/atlas/doclauncher/... COPY URL ✕
Example Templates	N/A	SpringCM (Contracts)	https://qana11.springcm.com/atlas/doclauncher/... COPY URL ✕
NDA	Approval Process Test	Salesforce (Opportunity)	https://qana11.springcm.com/atlas/doclauncher/... COPY URL ✕
Standard Contracts	N/A	Salesforce (Account)	https://qana11.springcm.com/atlas/doclauncher/... COPY URL ✕

Tooltip content: `https://qana11.springcm.com/atlas/doclauncher/eos/NDA?aid=6982&eos[0].Id={Opportunity.Id}&eos[0].System=Salesforce&eos[0].Type=Opportunity&eos[0].Name={Name}&eos[0].ScmPath=/Accounts/{(Account.Name)/Opportunities}`

Admins can see more information in the grid and copy generated URLs with 1 click

HI-TECH
www.HI-TECHcompanies.com

Doc Launcher Configurations

GO TO ACCOUNT HELP

4 Search Documents

Doc Launcher Configuration

What would you like to name this configuration?
NDA

Templates

ADD TEMPLATE

↑ NDA x

W NDA x

Would you like this configuration to launch a Workflow?

Launch this workflow: _____

I don't need to launch a workflow.

Where will you use this configuration?

In SpringCM

Destination Folder
/Sales CHANGE FOLDER

The controls and settings on the Doc Launcher Configuration page have been improved

New Doc Launcher REST APIs

SpringCM continues to expand its REST API and in the March Release, we have added new methods for accessing and using Doc Launcher programmatically. The same Configurations that you create for starting Doc Launcher from a SpringCM toolbar or from a custom button in Salesforce can now be used from anywhere via new API endpoints.

For more information about the new Doc Launcher APIs, visit these pages on SpringCM's Developer Center:

- https://apidocsna11.springcm.com/apidocs#!/DocLauncherConfigurations/DocLauncherConfigurations_GetConfigurations
- https://apidocsna11.springcm.com/apidocs#!/DocLauncherConfigurations/DocLauncherConfigurations_Get
- https://apidocsqana11.springcm.com/apidocs#!/DocLauncherTasks/DocLauncherTasks_Post



Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **Document History Reports:** Over the next several months, reports related to Document History will be updated to a new and improved user experience model. SpringCM anticipates rolling out these new reports starting in the month of April. When the new reports are deployed, the Document Uploaded Report will be renamed to My Uploads and the Document Activity report will be renamed to Document Activity by User.
- **Search Results** – SpringCM has recently deployed a new search technology in our platform which will help us deliver a number of enhancements for customers in the months ahead. In the March release, we have made some changes to Search Preferences and to the Search Results themselves:
 - **Highlighting text snippets** – Clicking on the '+' for a row in the Search Results will display the matching text in the document, if any. These snippets now provide more context from the document than previously shown. We have eliminated several of the Administrative settings around snippets in the Preferences page as they are no longer relevant. Administrators can still set the number of snippets that are returned per document in the Search Results.
 - **Removed search relevancy settings** – We no longer support the ability for SpringCM Administrators to adjust the relative weights of search fields in Search. Those fields have been removed from the *General Account Preferences* page.
- **Package Doc Launcher Configurations to copy across SpringCM accounts** – Administrators can now include one or more Doc Launcher Configurations in the *spackage* file. This allows for valid Doc Launcher Configurations created in source SpringCM accounts (e.g. UAT account) to be packaged and moved to a target account (e.g. Production account) to save time and reduce the chance of errors in recreating the Configurations.
- **External Review workflow steps** - In both External Review workflow steps (*Send for External Review* and *Review and Send for External Review*) emails sent to the initiator can now be suppressed. This allows the Business Analyst to tailor the experience for the internal user. Setting this flag in the email does not change the experience for the recipient or notification participants.
- **New Evaluate Document Text workflow step** - This step takes a document and allows the Business Analyst to look for specific text used in the document. This step can be used by the Business Analyst to determine the type of document (examples include

W2, W4, Bank Statement). Use quotes around the search parameter to do an exact match search. If you do not use quotes, then it will look for the words you specify anywhere in the document.

- **File It for non Salesforce Users:** Many organizations that use File It have a mix of SpringCM users and non SpringCM Users. The experience for non SpringCM User that load an object with File It on it has been greatly improved. Previously, non SpringCM users were presented with the SpringCM login page when loading an object with File It configured on it. With this release, File It will load but the login page is replaced by a warning message.
- **SXTerm documents** – Users can now take advantage of the rich text editor (RTE) to add styling, links and more to the the Option Notes field. Any styling applied to this field will affect how the Notes text appears in Doc Launcher and the Office 365 Add-In. Users are encouraged to preview the results of their work in these tools.
- **Office 365 Add-In–**
 - **HTML Markup supported for Option Notes.** This allows for additional styles (including links) to be positioned in the Add-In fields. Both data fields now support HTML Markup.
 - **SSO Support.** Standard SSO support was added for the add-in. This support allows for customers to use their currently implemented SSO for authenticating to the add-in.
- **REST API** – A new property has been added to the WorkItem API object that contains a link to the full SpringCM user interface. This allows API-based implementations to provide the user with easy access to the Workflow Inbox task page.
- **SAML SSO:** Due to a change made in the Salesforce Spring 2016 Release, a change has been made to support certificates with the crt extension.
- **SCIM (beta):** We offer a number of ways to synchronize users and groups between your internal systems and the SpringCM user repository. These include a csv import, setting up User Sync for Salesforce, and using our SOAP and REST APIs. With this release, we have expanded our capabilities and now also adopted support for SCIM 2.0. For information on the specific methods, click [here](#).

Fixes

Summary	Component
Fixed an issue where it was not easy to cancel completing external review on behalf of the recipient from within the SpringCM user interface.	External Review
Fixed an issue where it took roughly two minutes for SpringCM to provide a new authorization token after it expired.	API
Fixed an issue when an error would be returned when sending a document out for External Review and the due date was not specified in mm/dd/yyyy format.	External Review

Fixed an issue where an error would be returned if the original sender tries to complete External Review and no longer has Edit permission to the document.	External Review
Fixed an issue where a warning message was returned when creating a new Doc Launcher config after entering the name and hitting enter 'Enter'.	Doc Launcher
Fixed an issue where renaming a Doc Launcher Configuration could create duplicate configurations.	Doc Launcher
Fixed an issue where the Announcement page would continuously display for accounts in the Las Vegas DataCenter (NA21).	Preview
Fixed an issue where setting the EOS attribute group on a folder would incorrectly propagate down the folder tree.	API
The new Document and Folder Search features has been re-enabled for those customers who had previously experienced search indexing problems stemming from metadata errors in some automated workflows.	Search
Highlighted text snippets in Search Results has been restored after a brief outage resulting from the recent Search Engine upgrade (see Other Enhancements section above).	Search
Fixed an issue where the rich text editor was not properly rendering underlining for text in the SXTerm Text or Options fields.	SXTerms
Fixed an issue where Advanced Workflow was able to add repeatable attribute values to a document where the Attribute was not marked as repeatable.	Attributes
Fixed an issue where navigating folders in Tile View created a poor experience where the displayed folders were always 1 click behind the user action.	Browse Folders
Fixed the error message for non SpringCM users in Salesforce for Firefox.	File It
Fixed scrolling issue for File It in Salesforce1.	File It
Fixed document type icons for Share across all devices.	Share
Fixed Document Preview for Share on Mobile Devices.	Share

Known Issues

- Some customer accounts have not yet been converted to use the new Search engine. As we review and address known issues in these accounts, SpringCM will methodically move the remaining individual accounts over.



- When authorizing SpringCM Edit or SpringCM Sync on a Windows computer, you may encounter a javascript error message. You can click through these items to complete the authorization process.

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