



SpringCM Release Notes

March 2018



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Announcements

Workflows

Conversion to the new Workflow Designer format has been enabled in the March 2018 release. This means that the legacy workflow designer will be deprecated, and **ALL** workflows open in the new designer format. You can contact your SpringCM account manager to have the new Workflow Designer setting turned on in this release (January 2018) ahead of time if you want to work with the new functionality before it is mandatory.

Redefining the Admin and User Experiences

At SpringCM, we are constantly innovating ways to improve your user experience and help you make your work flow. Based on the research we are constantly doing, we are in the opening phases of creating unique experiences for account administrators and users. We would like to thank our SpringCM Labs members and our valuable customers for their participation in all the research we have completed thus far as well as the research that we are in the process of doing.

New arrangement of Preferences items

We will be re-organizing the navigation in the Preferences section as part of our continued initiative to improve the usability of the product. Expect incremental updates to the Preferences page over the next several releases. The first of these updates will be deployed in the March 2018 release.

SOAP API Deprecations

As of October 2018, SpringCM will be retiring support for legacy versions of the SOAP API. This includes versions v2,v3,v4,v5,v6,v7,v8,v9,v10,v11,v12, and v201305.

Customers who want to continue to use the SOAP API must upgrade to version v201308 or consider moving to the REST API. For more information on converting from the SOAP API to REST, please see <https://developer.springcm.com/guides/migrating-soap-api-rest-api>

Featured Enhancements

New Navigation

Overview

SpringCM's new navigation is designed to improve the efficiency of the end-user platform by pulling the main elements of our navigation into a consistent, top-level header. The new navigation pattern makes it quicker for you to find the things you need and easier for you to get to the most critical areas in SpringCM. We're delivering the new navigation to every user in SpringCM (both admins and non-admins). There is no way to opt in or opt out.

Navigation Enhancements

- A brief walkthrough that provides an overview of the new navigation displays when you log into SpringCM after the release. Users who access SpringCM exclusively from Salesforce (via FileIt, GetIt, etc.) will likely never see the walkthrough since they don't often interact with the SpringCM navigation.
- After the initial research and development for the navigation, we concluded that Address Book and Forms were generally more widely utilized by administrators than they were by general users. Non-administrator roles (Full Subscriber, etc.) no longer have access to the Address Books and Forms areas of SpringCM unless they have a [custom permission attribute that allows them to do so](#). Administrators can turn these links back on for the account from Account Preferences.
- The Home button has been replaced with a company-specific icon to give your account a more personal feel.
- We created a Utility menu in the top-right corner of SpringCM. This menu provides users information such as their account name and ID, user role and the logout link.
- The search bar now displays in its new static position at the top-right corner next to the Utility menu. You'll always have access to basic content search by typing a search term in the search field and pressing Enter. Click the magnifying glass in the search bar to open the advanced search page.

Administrative Enhancements

- Admins have a new tool for customizing account navigation. The "Navigation and Actions" page displays for account administrators under Account Preferences when they click the Admin link. You can do things like toggle which page links display on the navigation header for the account and change the account homepage on this page. The addition of this page makes it so that non-admin users can no longer change their own homepage and customize their personal navigation.
- All navigation links are visible to all administrators, so if you choose to change account navigation settings, you cannot see the changes unless you log back in as a Full Subscriber or other non-admin role.

Branding Enhancements

- The Home button has been replaced with a company-specific icon. This is not the same as your company logo that SpringCM sends with emails, etc. We added a new "Current Icon" section to the Account Preferences > Branding page. The icon displays in the top-left corner of the SpringCM application. Users are redirected to their account homepage when they click on it. You want to use an icon similar to one you would use on your company's social media page. Your icon

asset should be no more than 40 px tall to optimize its display. We recommend using PNGs with transparent backgrounds for best results.

- Legacy branding settings will be deprecated from all accounts in release 18.3 (May 04, 2018) in order to accommodate continuing improvements to SpringCM branding preferences in future releases. You need to contact either your account administrator or representative at SpringCM in order to make sure the most up-to-date branding features are turned on for your account.

Read the “New Navigation Basics” knowledge topic to learn more about the exciting enhancements to the SpringCM navigation: <https://knowledge.springcm.com/navigation>

OneLogin SCIM Integration

You can now manage SCIM user provisioning in SpringCM with OneLogin. This makes it easier for administrators to onboard and offboard users directly from OneLogin.

We currently support the following use cases:

- UAT and Production environments supported for both SAML and user provisioning
- Provisions Full Subscribers only with the following attributes:
 - First Name
 - Last Name
 - Username
 - Email Address
 - Security Group Assignment
- Deprovision Full Subscribers
- Provision security groups (Note: groups must first be created in SpringCM and then provisioned back to OneLogin before you can assign users to them)

You can find the SpringCM application in the OneLogin App Catalog. There is a SpringCM company application available for both UAT and production environments. If you already have the SpringCM app in your OneLogin account, the app should automatically be updated for this change.

Workflow Aggregates Report (Open Beta)

The workflow aggregates report allows users to get a high-level view of the workflow activity during a time window. The report in its current iteration of development refreshes every day. Please note that workflow data prior to August 26, 2017 is not available for use in the Aggregate report.

The workflow aggregates report summarizes aggregate data from selected workflows that you specify using a particular date range (e.g., “this week”, “last week”, “last month”, etc.). You can save the report and add it as a widget to the dashboard (the saved report reflects the state of filters and columns when you saved it).

This report is in its Open Beta release, meaning that it is not automatically turned on in your account. Your account administrator can turn on the workflow reporting functionality in Admin > General.

Workflow Details Report (Open Beta)

The workflow details report allows users to see all the individual workflows that were active during a specific range. The report currently refreshes every 15 minutes.

You can drill further into workflow data using the filtering options. These include

- Workflow name
- Initiated by
- Status (Executing, Completed, Failed, Aborted)
- Currently assigned to (setting is enabled only when you select Status = Executing in the Status picker)
- Current Stages
- Date range
- Document attributes

The data presented to you in the details reports let you analyze workflow trends based on workflow lifecycle. You can view which workflows are active during a specific time period, how long they were active, who initiated them, who the current assignment belongs to, etc. This helps you identify areas of both significance and improvement in your day-to-day business processes.

You can save the report and add it as a widget to the dashboard (the saved report reflects the state of filters and columns when you saved it).

This report is in its Open Beta release, meaning that it is not automatically turned on in your account. Your account administrator can turn on the workflow reporting functionality in Admin > General.

Workflow Designer Enhancements

- The Workflows page has been redesigned and now focuses solely on the creation, administration and monitoring of workflows. This page is currently in its Open Beta release. Admins can turn the new page on in Account Preferences > General. Check the Enable New Workflow Tasks and Administration Pages (Beta) checkbox and click Save. This checkbox also controls the new Tasks page. Keep in mind that you are enabling both features when you save this setting.
- Navigation to Workflow definitions and Workflow Activity has been clarified and streamlined using tabs on the Workflow Page. Navigation within the Admin section of the application now persists on the Workflows page, so admins stay oriented and can easily navigate to other areas of the application.

Tasks

- We replaced the Workflow Inbox with a dedicated Tasks page so that, as a SpringCM user, you can more effectively locate and manage your tasks generated from workflows.

Workflow Activities

- Process Monitor has been given priority on the Workflows page and has been renamed to Workflow Activity. The legacy workflow page had the process monitor featured on the page as well; however the

new design restores the accessibility of the process monitor. This creates an environment where you, as an administrator, can seamlessly move between monitoring and creating workflows.

- Workflow Activity is readily available for you to review, search, and filter on multiple fields, including a new lightweight filter for multi-selecting workflow statuses. This completely overhauls the existing search function for finding workflows and processes, which allows you to search across info, name and GUID. You can also filter on workflow, multiple statuses and custom date ranges.

Workflow Configuration

- Administrators have the following workflow configuration capabilities:
- You can now manually kick off a workflow in order to test or initiate ad-hoc workflow activity. Select a workflow on the Configuration tab and click the Start button.
- You can also download the raw workflow file and add it to tickets for better and faster resolutions when working with SpringCM Customer Support.
- Finally, you can delete workflows from the Configuration tab.

Minor Enhancements

Doc Launcher

- Text Fields can either be Rich Text or Plain Text. This allows you to better manage cases where you need carriage returns in a plain text field.
- Help text character limit has been increased to 1,000 characters by default. This mitigates the need to go into Advanced mode just to increase character limits.
- Each Doc Launcher Form is now managed by the account ID and the form UID. This change optimizes form performance. **While the data migration is in progress, the modified date displays as 1/1/0001. This is temporary until all the data has been migrated.**

Web Services

- Search results no longer return attributes. An “Expand” property has been added to search that only takes the “AttributeGroups.” If the request contains Expand:AttributeGroups then attribute values are returned in the same way as document collections. This simplifies the experience for developers who need to deliver results that include documents and attributes.

Bug Fixes

Address Book

- New users no longer receive activation emails if their account administrator unchecks the "Send activation email" checkbox.
- SpringCM-generated 'blacklisted email address' NDR automated email notifications now display the email address, and date/time when the address was blacklisted.

Doc Launcher

- You can now have two conditions in a Doc Launcher form that reference that same target ID. This issue occurred if you changed the merge tag and have two resultant conditions with the same merge tag that are conditionally selected.

Document Preview

- The document preview window no longer unexpectedly closes after a document from either Salesforce or SpringCM uploads.
- Document preview no longer displays a null "Sent to" value when a workflow assigns the document's associated step to a queue. The sent date and number of views are the only two attributes that display.

File It

- File It no longer creates duplicate folders with the same name when the folder name depends on a value from a Salesforce field and that Salesforce field has more than 100 characters.

Packaging

- SpringCM now packages submitted forms. Attributes included in the package definition are included in the form. Attributes not included in the package definition are not included in the form.

Workflows

- Users can no longer complete workflow tasks if required attribute fields are left blank.
- The "Review and Send for External Review" workflow step no longer fails if an apostrophe is included in the Instructions field.
- If a user completes a task and the next task is assigned to the user and/or security group the user is in, the new document previewer now successfully displays the next step in workflow.

- Incoming Content workflow variables can no longer be saved if there are spaces in the name. The workflow engine now validates the variable name when you create or edit. You cannot save the variable until you remove the spaces.

Known Issues

The following section lists known issues in SpringCM as of the March 2018 release.

- Existing reports may add an additional header row when exported as a CSV. The additional header row can be removed by going in the report wizard and re-saving the report.
- A decimal attribute field value not in a U.S. numeral format that is set in a document rule (Assign Attribute Value action) is changed when applied to a document. For example, the value 456.789,12 in an attribute decimal field in a document rule gets changed to 456.789.123,00 when applied to a document.
- Editing and saving an Excel XLSX document via SpringCM WebDAV may result in an error from Microsoft when you try to open it. XLS (Excel 97-2003) versions do not result in an error and can be opened.
- A user cannot edit a document with the legacy Salesforce package with the SpringCM Edit application.
- Building a search with attributes in the new dashboards does not allow you to pick a dropdown field.
- The left-hand panel of the public share page for a folder cannot be resized.