Release Notes

May 2016

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 browsers 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.

SpringCM Mobile for Android

Due to declining customer demand and increased development and maintenance costs, SpringCM has sunset the SpringCM Mobile App for Android. At the end of April 2016, the application was removed from the Google Play Store and Amazon Store. Customers may choose to continue using the current version of the application if installed on their devices; however, SpringCM will not enhance or bug fix SpringCM Mobile for Android in the future.

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

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 will not upgrade our infrastructure to support TLS 1.2 as originally planned in April 2016; however, we strongly recommend that customers adequately plan for and do not put off this initiative. For additional information, please click here. (https://knowledge.springcm.com/tls-encryption-protocol-standards-effective-april-2016).

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. For details, click here.

Enhancements

Doc Launcher Template Filters

In the May 2016 Release, SpringCM is releasing yet another wave of significant enhancements to Doc Launcher, a key platform component for starting Contract processes and other document-based workflows.

Use familiar attributes to tag and filter large template collections

Some SpringCM's customers are using the platform to build and maintain a large number of Doc Launcher templates, both for their contract management needs as well as other business use cases. To support these scenarios, SpringCM now provides a convenient way to use attributes for organizing collections of templates and offers new easy-to-use tools for the end user to quickly find the template they need to start their process.

For each Doc Launcher Configuration, the SpringCM Administrators can choose which attribute(s) they would like to use for tagging individual templates.
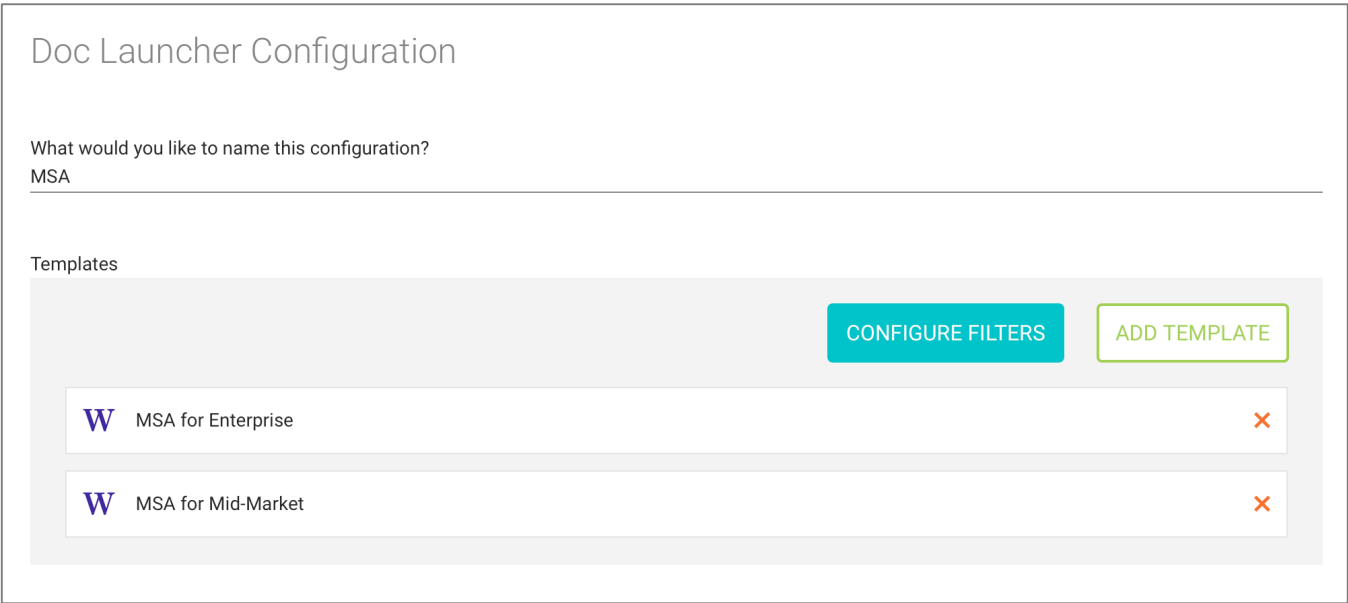
Doc Launcher Configuration

What would you like to name this configuration?
MSA

Templates

CONFIGURE FILTERS   ADD TEMPLATE

W   MSA for Enterprise   ✕

W   MSA for Mid-Market   ✕

Figure 1 – When enabled in the account, a new option appears for configuring filters
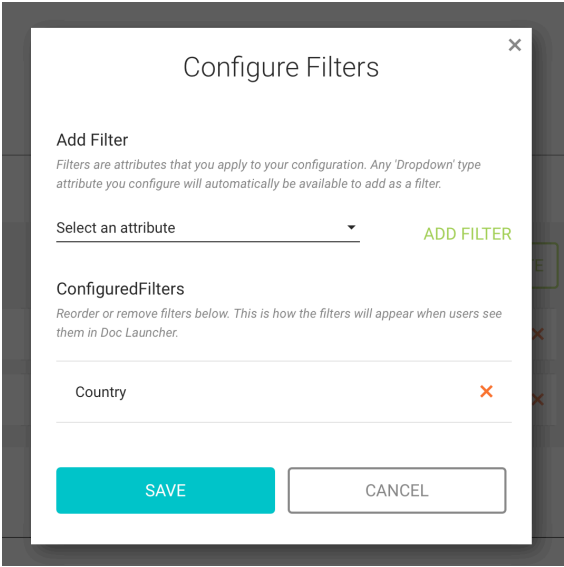
Figure 2 – The Administrator selects an Attribute (e.g. Country) to be used as a filter for templates

Attributes are ideal for pre-defining a list of valid values for tagging templates. Users may also use the same attributes to index documents like SXTerms (i.e. for clauses) making it convenient to use the same values for searching and reporting across the account.

When templates are tagged with one or more attribute values, users can easily apply tags in Doc Launcher to quickly narrow down the large list of template options.
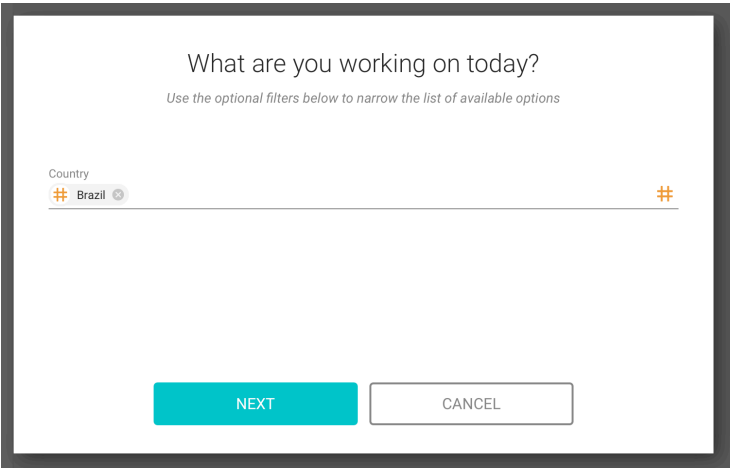

Figure 3 – Users select one or more tags to filter the list of templates

With Doc Launcher Template Filters, Administrators can easily tag templates using existing Attributes values, allowing users to find the necessary templates and clauses faster, to accelerate contract generation.

Doc Launcher Forms - Pilot

With the May 2016 Release, SpringCM has significantly improved the setup experience for defining a form used in Doc Launcher. The first step in setting up Doc Launcher is building a Template. A template consists of an input form and a merge document. We have made it significantly easier to configure the input form and tag areas in the pre-approved Word templates where this data needs to go.

Prior to this release, Administrators built these forms by configuring XML documents with the fields and their specific properties. This approach offers a host of advanced features that allow our Professional Services organization to deliver solutions that match our customers' needs.

With this release, we have started surfacing these functionalities directly inside the SpringCM user interface. Administrators are now able to build simple forms that can pull data directly from Salesforce and merge this data into the Word template. We have introduced the ability for customers to add text fields, dates, drop downs, checkboxes, radio buttons, and easily utilize an SXTerm Document.

Once the input form has been setup, it is easier for the Admin to set up the Word template. Merge tags are generated and can be easily placed in the Word document.

If you are interested in trying out this new feature, please reach out to Customer Support, your Account Executive, or send an email to built4me@springcm.com.

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-forms

Search Filters for Office 365 Add-in

In May 2016, Spring CM will improve on the newly released Office 365 Add-in experience by granting users the ability to search and filter results of their clause library. This is the first of many enhancements to the Add-in that SpringCM will be releasing this year.

In the past, users were only able to search via keyword for their clauses within the Add-in. This presents a problem for larger organizations as more than one team may have similarly named clauses that they would like to add to a document.

Now users will be able to leverage attributes, as previously mentioned in the doc launcher template filters section, to allow users to filter their search results based on language or country. Teams in different locations across the world can now ensure that the clauses they are searching for are in the desired language or configured for their desired region.

Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **Search:** The search engine now supports ad-hoc phrase searches which are being used by customers in the Get It app to execute certain queries against Salesforce data.
- **Doc Launcher Configuration:** The cards representing individual Templates will now reflect any configuration errors by showing a warning icon in place of the "upload" or "template" icon. Clicking on the card will open the Edit Template modal dialog where the Administrator can quickly remedy the problem.
- **Doc Launcher Configuration with Salesforce:** When your account has not been configured to connect with a Salesforce account, a friendly message will be visible on the Doc Launcher Configuration page indicating the pre-requisite steps and pointing to an updated Knowledge Article for more information.
- **Doc Launcher Configuration Templates:** The Add/Edit Template modal dialog now verifies and automatically lists the companion XML file for any PDF template. If the XML file cannot be found in the same folder as the selected PDF, the system will report an error message and the Administrator will need to fix the problem or locate a different Document Template File.

Fixes

Summary	Component
Fixed an issue where the Due By Date on the Complete External Review page always uses US formatting.	External Review

Fxed an issue where completing External Review internally as a Super Admin who was not the original sender returned an error.	External Review
Fixed an issue where a user was unable to get to the history of the document from the workflow step.	Preview
Fixed an issue where the Evaluate Document Text did not perform an exact match search of text within the document.	Workflow
Fixed an issue where Doc Launcher Configuration could not find an deleted Form Configuration File or Document Template File, now reports an appropriate error.	Doc Launcher Configuration
Fixed an issue where Doc Launcher was not higlighting required fields on the form when the user attempted to upload a new document.	Doc Launcher
Fixed an issue where Doc Launcher incorrectly warned the user "Please select only 1 document" when pasting text into a field on the form.	Doc Launcher
Fixed an issue where Doc Launcher was accidentally triggering the "NEXT" action when the user hit RETURN on a form field	Doc Launcher
Fixed an issue where Doc Launcher was not clearing an uploaded document when the user starts over with the same template.	Doc Launcher
Fixed an issue with Export Search where the CSV file was not reflecting the setting for maximum number of search results.	Export Search

Known Issues

- You may need to preview a video document uploaded prior to this release twice before you see the video.
- Saving a Doc Launcher Form when no changes are made will result in another document being created.

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