springcm

Release Notes

November 2014

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About the Release Notes

What's included in the Release Notes

SpringCM Release Notes address new enhancements and fixes to the SpringCM platform, including SpringCM apps.

Feedback Information

We're constantly looking for ways to grow and innovate at SpringCM. Your feedback is essential to improve our product as well as its documentation and online support. We want to know what you like and what you don't. Give us your feedback at support@springcm.com.

Release Overview

This release contains many excellent new features that allow SpringCM customers to avoid content hazards and more ways to put your content to work. Please contact SpringCM Support (support@springcm.com) if you have questions regarding these features.

Administrators are encouraged to share the information in this document with their users.

Enhancements

E-signature Improvements

Electronic signature is a very important component in many processes and our customers have let us know that more advanced use cases need to be supported. In our prior release we added new e-signature features to the "Send for Signature" page. In this release we have added a few more features to the page and have made all the new features available via workflow.

Highlights

- A person sending a document for signature can specify an expiration date for the signature transaction. If the document is not signed before the expiration date, the signature request will be automatically canceled and the document will be checked back in to the SpringCM document repository.
    - A new field, "Expiration Date" has been added to the Send for Signature page. A date picker has been added to select the expiration date
    - Expiration date has been added as a property to the "Send for Signature" and "Review and Send for Signature" workflow steps
    - The expiration date selected by the person or workflow will override the default expiration for date of the e-signature account.

- E-signature activities are now added to document history. A new document history item will be added when the document is viewed, signed or rejected by each signer.

- The "Send for Signature" step has been updated to include all the features of the Web client
    - Multiple signers can be added to the signature request and can be required to sign in the order specified in the workflow step or in any order.
    - A Carbon Copy (CC) can be added to the signature task to allow others to be notified when the request is sent and complete.
    - The Expiration Date can also be set.

- A new workflow step, “Review and Send for Signature” has been added. This step is used to allow a person to review a document ready for signature before it is sent to the signer(s). It works like other human workflow steps which have an assignee that is responsible for completing the task and will appear in the assignee’s workflow inbox.
    - The Assignee will be able to review or modify any of the settings for the e-signature activity: signers, expiration date, cc, and other capabilities
    - The Assignee will also be able to review and modify the position of the signature for each of the signers as well as add new signature fields.
    - The Assignee can complete the step via the “Send” button which will send the document for signature. The workflow will remain in the assignee’s inbox until the document signature process is complete.
    - The assignee can complete the step via the “Reject” button which cancels the signature and allows the workflow to move on to the next step.
    - The Assignee can also choose the “Cancel” button which closes the workflow page, pauses the workflow and allows the assignee to complete the task at a later time.

Editions

Business	Contracts	Enterprise	Premier
	X	X	X

Available Via:

Web UI	Salesforce	Mobile	Desktop Apps
X	X		

Available To:

Guest	Full Subscriber	Administrator
	X	**X**

Introducing Track It!

Track It! is a new app, for our Salesforce customers that allows everyone to gain visibility into the status of documents that are going through a workflow. Track It! allows you to interact while on the go with these workflows directly through Salesforce 1 while on your mobile phone or tablet.

Highlights

- Track It! provides a list of all SpringCM documents that are in an active SpringCM workflow.
- For each document it is possible to see whose turn it is to act and the number of days it has been waiting for the aforementioned user to complete the task.
- Documents are sorted by the length of time that they have been waiting for a step to be completed
- Documents that have been waiting the longest to be completed are at the top of the list.
- Clicking on a document will show the activity stream for the document while in the workflow
- There are buttons to send a reminder to the assignee via email or chatter
- The assignee will have a button that will open the document in SpringCM workflow

Note: This app is a beta and is available upon request. Customers interested in being an early adopter may sign up here: https://tools.springcm.com/trackit

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Other Enhancements

- Beginning with the June 2014 release, new styling was introduced for all email messages generated by SpringCM. The new styling uses the SpringCM color theme, replaces links with buttons, etc. The text of the messages has also been updated to be more readable. This process will span the next 2 -3 releases. In this release the following messages have been updated:
    - External Review
    - Advanced Workflow Steps
        - Email
        - Email Document
        - Choice Step
        - Approve Step
    - Change Password
    - Approval workflow step expired
    - Approval workflow finished
- The Menu bar has been suppressed for Portal users accessing SpringCM via Salesforce with pop-up links. Should you need to customize what functions a portal user can do, please see the following links to help
    - Setting up custom toolbars
    - Setting up personas
- Mobile Support for Viewing Public documents and folders
    - The page used for viewing public documents and folders has been optimized to automatically adjust to the size of the screen
    - Support for mobile phones and tablets
- The user's SpringCM Password is no longer saved when using AutoComplete. The user will always be required to enter the password when going to the SpringCM Login page.
- Workflow
    - Subscribe to Sync Folder is a new step that can be used to subscribe to folder so that it will synchronized with the user's PC.
        - Can choose to subscribe to a single folder or a folder and all subfolders.
        - The step will fail if there are more than 50 folders or if the path of the selected folder is greater than 180 characters
    - Unsubscribe Sync Folder is a new step to unsubscribe to folder so that it is no longer synchronized to user's PC. Unsubscribing to a folder will automatically unsubscribe with all sub-folders.
- A new version of a document can now be checked-in without having to first checkout the document.
- Administrators are now unable to remove fields that are used in SpringCM Reports. An error message is returned when an Admin attempts this task letting them know the Reports that use the specific field.
- The styling of the login page has been updated to reflect the SpringCM brand
- Sync 2.8 will be released on both Windows and OS X. This release includes significant performance increases in syncing content to the desktop as well as evaluating changes

that have been made in SpringCM. Additionally, you can now search for a folder to add to your subscription profile without navigating deep and complex folder trees.

Fixes

Summary	Components
An issue where a zero byte file could cause a folder archive or zip request to fail.	SFTP
An issue where a link to the folder was displayed on a merge	Salesforce Widgets
An issue where previewing a zero byte file would return a system error.	Browse Documents
An issue where a new document's auto number field is not updated when the document is copied into a folder that has the same auto number field set as default metadata.	Attributes
An issue where copying a folder may not always have the correct security assigned	Folder (Security)
An issue where the second message may not have any content if multiple status messages are returned for a specific document and reviewed sequentially by clicking on the status icon indicator.	Browse Documents
An issue where attempting to add a repeatable field within a non-repeatable set would return an error	Preferences (Attributes)
An issue where specific PDF documents could not be previewed	Documents (Preview)
An issue where branding was not respected when generating specific email messages	Email Messaging
An issue where a resizing handle would be seen for non-sizeable selection columns if the Modified By column is hidden.	Salesforce
An issue where previewing a document with View PDF may show multiple downloads in Document History	Documents (History)
An issue where a user with a + in the email address could not be found in User Chooser type-aheads	Address Book
An issue where history is not displayed correctly when document attributes are updated with multi-byte characters	Documents (History)
An issue where new or edited reports do not respect culture when applying the Date and Time	Reporting

stamp.	
An issue where setting the portal user flag to 0 or 1 was not processed successfully	User Sync
An issue where the document could be downloaded via a share link even if download native and download pdf are not selected.	Documents (Sharing)
An issue where uploading a document would fail when duplicates are not allowed and a document with the same name already exists in a folder.	SOAP Web services
An issue where an Echosign API Action Id message was returned when too many signers were supplied	E-signature (Echosign)
An issue where a line return was not used when displaying comments	Workflow
An issue where some documents would generate a preview but not get full-text indexed	Document (Preview)
An issue where the folder name would include encoded characters if special characters were used in the name	Documents (Browse)
An issue where the workflow instance id was not displayed in the Process Monitor in some cases	Workflow
An issue where sync folder subscription changes took a long time to process	Sync
An issue where a search that should return both folders and documents would only return documents	Search
An issue where a complex query executed from Document Package Builder using the same Salesforce object would return incorrect results	Document Package Builder
An issue where documents are not named correctly when a naming template is applied and a smart rule moves these documents into another folder.	Smart rules
An issue where installing a large package could result in duplicate objects	Packaging
An issue where the workflow would not load in the Process Monitor when an approve document step is run multiple times	Workflow

Known Issues

- Large uploads greater than 700 MB may occasionally fail through the user interface
- The SpringCM Edit pop-up will not automatically close when using SpringCM Edit version 1.3.
- If a report has already been created with a field that has been deleted, the report creator is unable to edit the Report. The report editor needs to remove and then re-add the Attribute Group.

End of Life Announcements

- Internet Explorer 8 support will end with the March 2015 Release.
- FTP Support will end with the March 2015 Release