springcm

Release Notes

November 2015

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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

In January 2016, SpringCM will no longer support version 9 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.

The SOAP API Version 6 has been deprecated with this release. Any calls made to SOAP Version 6 end point will result in a 500 Server Error.

Other Announcements

The SpringCM Track It for Deal Visibility Application will be available in the Salesforce App Exchange in conjunction with the release. You can find additional information about the Application here.

Enhancements

Account Branding

Over the past year, we have been busy enhancing features and updating pages throughout the entire SpringCM platform - and that work will continue through the next year. As those improvements have accumulated, it highlighted a new challenge, specifically making sure all the pages have a consistent look and feel. We are now pleased to announce a better way for customers to control the styling. In the November release, we have created an entirely new page in the Preferences section where Administrators can better configure branding across the account.
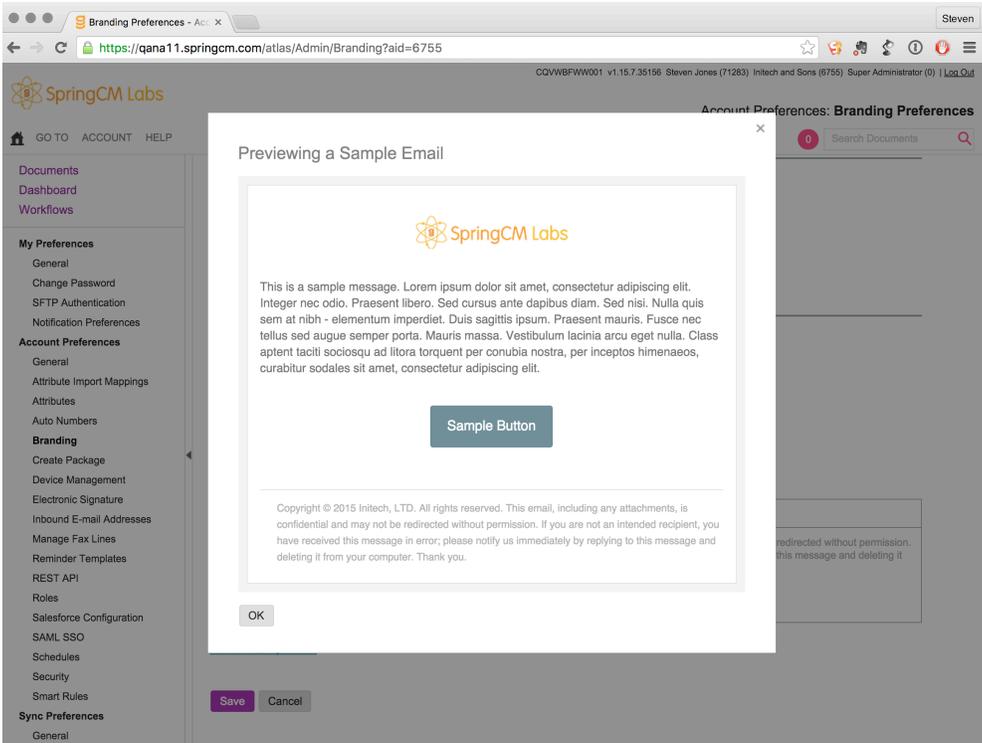
You can use the page to upload a custom logo, to pick primary and secondary colors for the different page elements, and to configure outbound email messages.
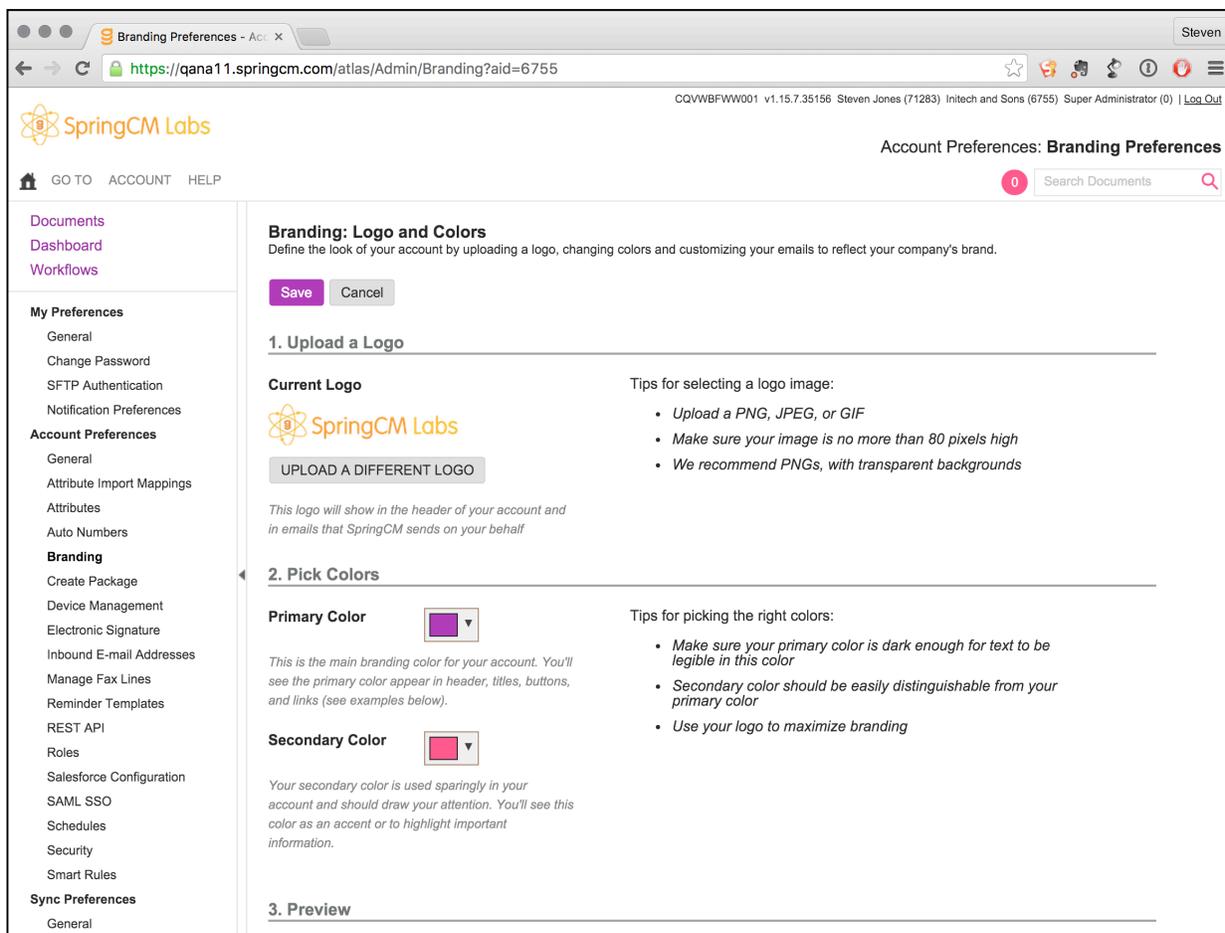
Admins use new Branding preferences page to upload logos, change account colors, and configure account-wide email messages
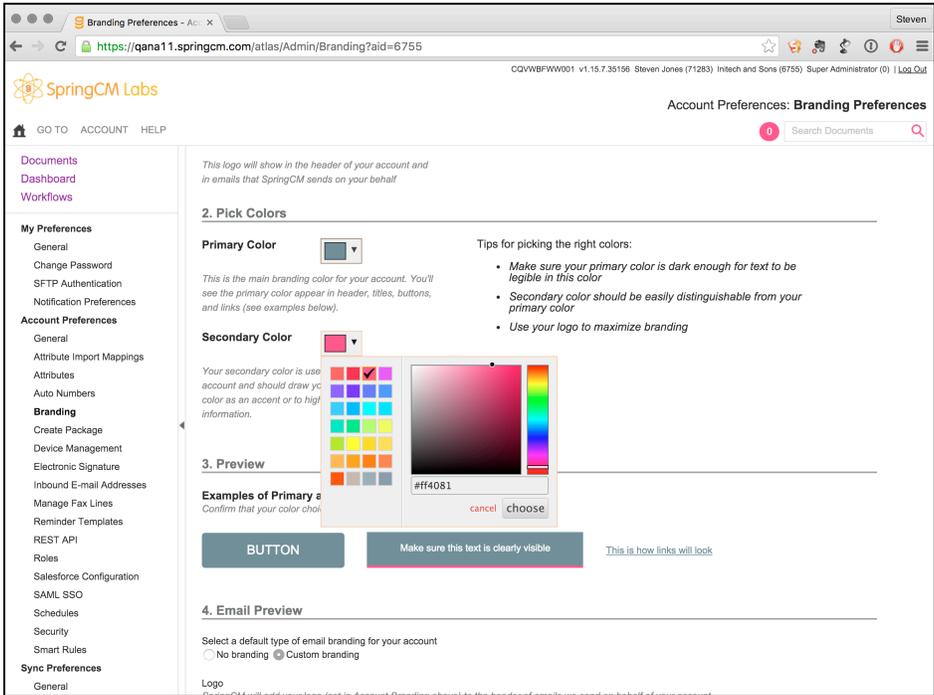
Preview branding changes on the fly to enable real-time previewing before saving

Preview sample email messages to confirm logo, colors and custom footer
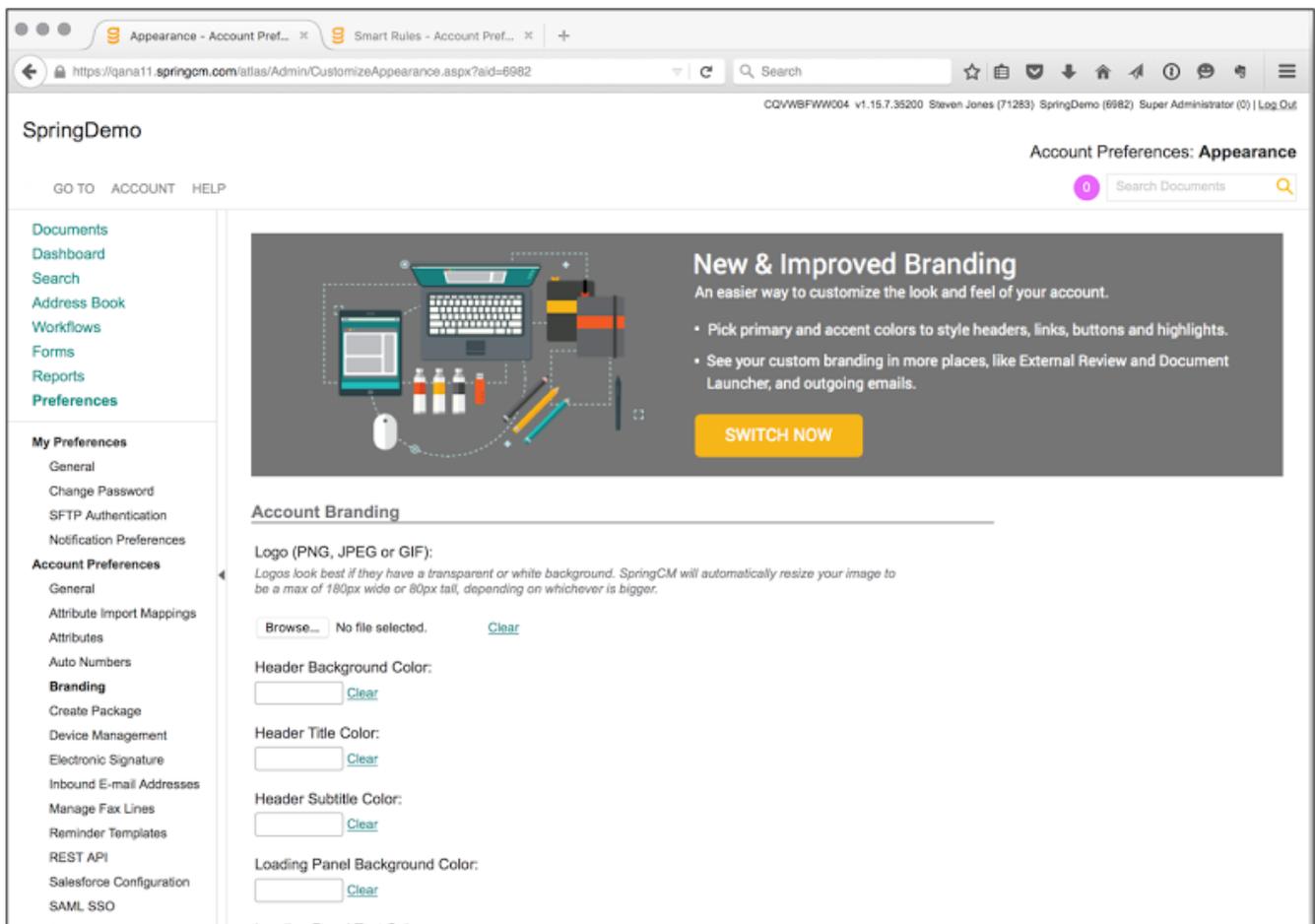
Your branding preferences will affect all the pages in your SpringCM account, external pages and emails that are shared with your customers/partners/vendors, as well as the apps like File It used in Salesforce.

Migrating existing accounts to use the new Branding features

As of November 7th, <u>all new SpringCM customers</u> will default to use the new Branding features outlined above.
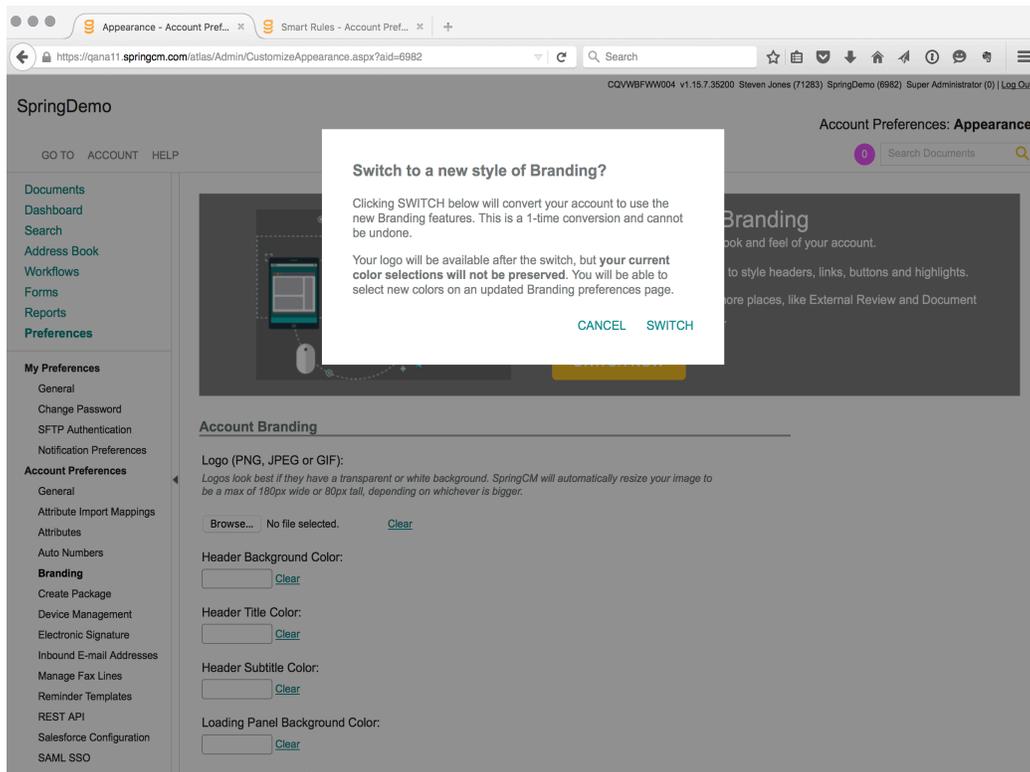
<u>All existing customers</u> will have the option to convert their SpringCM account over to the new branding by visiting the Branding page in the Preferences area. Administrators can visit the page at any time and decide if/when to make the switch.

**A prominent message at the top of the previous Branding page
prompts the Admin to switch to use the new feature**

The Admin must confirm the one-time conversion process

NOTE: Converting an account to use the new Branding preferences will result in losing any and all previous settings. To be clear, any color preferences made via the older Branding page will not be preserved and must be re-applied in the new Branding page.

There is absolutely no requirement to use the new Branding features and existing customers can continue using their current branding preferences indefinitely.

All existing and new SpringCM accounts that have not yet uploaded a custom logo using either version of the Branding Preference page will see their Account Name displayed in place of the default SpringCM logo. This will be more obvious to existing accounts who may be used to seeing the SpringCM image in the top left corner of the page.

The steps to transition are simple:

1. Navigate to the Branding page, locate the grey banner at the top of the page and click on the yellow button labeled "SWITCH NOW"
2. Confirm your selection in the pop up dialog by clicking "SWITCH"
3. The browser will automatically refresh to show the new Branding page. Your custom logo (if exists) and your custom footer message (if specified) will be preserved.
4. Change the Primary Color and/or Secondary Color to suit your account

5. Click "Save" at the top of the page to apply any styles

Editions		Available Via		Available To	
Business	X	**Web UI**	X	**Guest**	X
Enterprise	X	Salesforce1		**Full Subscriber**	X
Premier	X	Mobile		**Administrator**	X
		Desktop Apps			

Document and Folder History

As a contract process completes, many events take place in SpringCM that are captured in Document History. These events summarize everything that has happened to the document throughout the process. Many types of users use Document History to assess where the document is, who has looked at it, and what has happened to the document. A Sales Rep may look at Document History to see if someone in Legal has looked at a document before sending a reminder to complete a task. Admins, on the other hand, may look at Document History to identify why a contract went down a particular workflow path.

With this release, SpringCM has taken a major first step in making it easier to review the history of a document or a folder to find out what has occurred.

History Page

We have built a new history page that is available for documents and folders. The history page includes the following key improvements that make it easier for users to review these actions:

- *Lazy Loading:* You will no longer need to page through history messages in increments of 10, 20, 50, or 100. As you scroll down the page, SpringCM will load history messages automatically.
- *Filtering:* You will now be able to filter on more than one type of activity.
- *Sorting:* You can sort on each of the columns on the page: User, Date, Action and Detail.
- *Resizable Columns:* All columns are resizable.
- *Improved formatting:* The page has been laid out to make it easier for you to review each message.

Document History Messages

The text of each history message remains unchanged with this release. We have consolidated More Info and Comments in the Detail column on the new history page. We have renamed the Metadata Changes filter to Attribute Changes.

Beginning in the January 2016 release, SpringCM will begin changing the way we communicate information about each history action from within Document History in order to provide more concise and valuable context to our users. This change will span multiple releases and all specifics will be detailed in subsequent release notes as the enhancements are rolled out. If your organization relies on the text of the message for any integrations through web services or custom reporting, be prepared for these improvements to start in the January 2016 release. This will have no impact, other than updated text descriptions, for those who only access document history through the UI.

Document History SOAP API Changes

When retrieving Document History via SOAP (DocumentHistoryGetById), the following nodes have been removed from the response in all versions of SOAP:

- UserId
- RelatedData
- FolderId

- FolderName
- DocumentStatus

The CreatedDate format still adheres to the ISO-8601 standard but now includes a higher level of precision.

When the document has been checked in and a new version of the document has been created, the RelatedVersion now includes the GUID (Globally Unique Identifier) instead of the version number. Should you need to get a list of versions associated to a document, you can use the GetDocumentRevisions web service call.

Document History REST API Changes

When retrieving HistoryItems for a document via REST, the following changes have been made:

- The User Object in the HistoryItem now is the user's email address instead of a guid (Globally Unique Identifier).
- The CreatedDate format still adheres to the ISO-8601 standard but now includes a higher level of precision.
- HistoryItems will be returned in descending order instead of ascending order.

Folder History

With this release, you will now be able to see actions that have occurred to a folder. This page will be available for Full Subscribers, Super Admins, and User Admins. These actions are captured for a folder.

- When a folder is created
- When a folder is moved
- When a folder is renamed
- When a folder description is set, changed, or cleared
- When a folder is moved to the trash
- When attributes are added, changed or removed on a folder
- When a fax number is assigned to or unassigned from a folder
- When pinpoints are enabled or disabled on a folder
- When an email address is added, changed or removed
- When a folder is shared
- When a folder share is accessed
- When security is set, changed or removed on a folder.

When looking at Folder History, you can filter on Folder Activity, Attribute Changes, Security Activity, and Share Activity.

| Editions		Available Via		Available To	
Business	X	**Web UI**	X	Guest	
Enterprise	X	**Salesforce1**	X	**Full Subscriber**	X
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		Desktop Apps			

Doc Launcher (beta)

SpringCM is pleased to announce Doc Launcher, a completely new tool for generating documents and launching them into workflow. Using your own templates, you can quickly merge data to create new contracts, agreements or any business document and instantly send it through the appropriate downstream business process. Doc Launcher is the first of its kind combining SpringCM's powerful document generation capabilities with our even more powerful Advanced Workflow engine.

Users start Doc Launcher from their browser while logged into their account or from within Salesforce using buttons on any standard or custom object such as Account, Opportunity, or Quote. The interface is intuitive, guiding the user through the steps to validate the data before merging and verifying the final merged document before saving to a SpringCM folder.
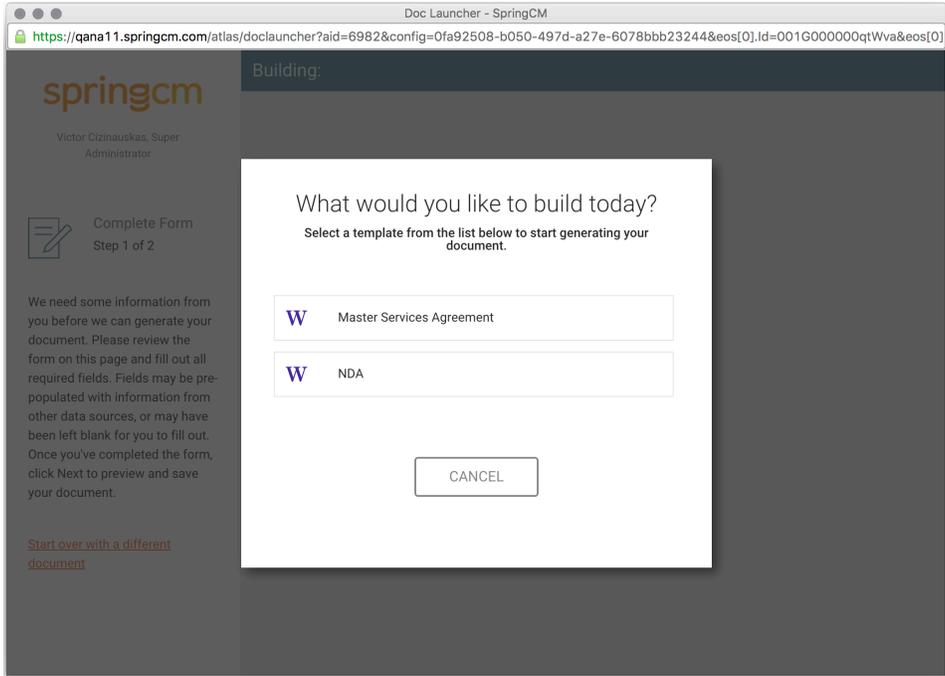
Start by selecting one of the current document templates
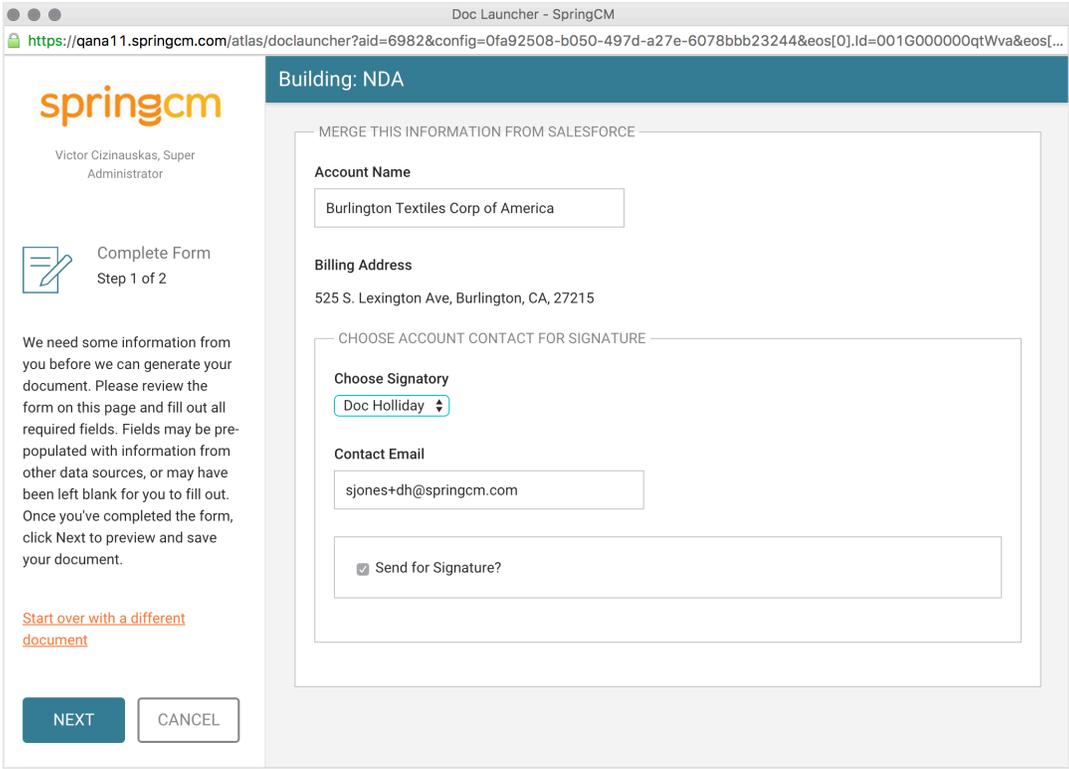
Use a configurable form to collect and validate data before generating the document

Click to generate the new document and preview it directly in the tool

Scroll through the final document or return to the form to make any changes

In the November release, Doc Launcher can only be used to build a single document from a list of your templates. In future releases, we will extend the functionality to build multiple templates at the same time and to combine them into a single document to be used in downstream workflow.

Doc Launcher is the successor to and the inevitable replacement for our Document Package Builder feature. If you are using Document Package Builder (aka Doc Builder) today, then the transition to Doc Launcher will be easy. We are committed to helping customer migrate any existing configurations to the new tools in the weeks and months ahead.

Please note that there are no plans to deprecate the existing Document Package Builder feature and it will continue to operate as normal in your account.

To assist you with the set up for your account, we are also announcing a new Preferences section for Administrators to wire up templates and configure Doc Launcher. Read below for more information.

Editions		Available Via		Available To	
Business	X	**Web UI**	X	Guest	
Enterprise	X	Salesforce1		**Full Subscriber**	X
Premier	X	Mobile		**Administrator**	X
		Desktop Apps			

Configuring Doc Launcher (beta)

We have taken a first step at significantly reducing the reliance on XML documents for configuring Document Launcher. With this release, no longer do you need to create an XML document to identify which Templates show up when Document Launcher is invoked. You still need to manage each individual template with an XML document.

You can now create multiple configurations directly from SpringCM preferences.   Each configuration can contain multiple templates that are ordered and named exactly the way you want.

As you set up Doc Launcher, you can also specify what workflow to start and if Doc Launcher needs to run in Debug mode. Debug mode is used to make it easier to develop your Doc Launcher templates and to troubleshoot issues as they arise.

Doc Launcher currently can be launched from within Salesforce or stand-alone from within SpringCM.

With the next release of Doc Launcher, we expect to make it significantly easier to construct the URL as you define how you want to invoke Doc Launcher.

Administrators navigate to the Doc Launcher Config Preference Page and add a new configuration

Doc Launcher Configuration

What would you like to name this configuration?

Configuration Name

SOW Generation

Templates   ADD TEMPLATE

You don't have any document templates set up yet.
Please click Add Template above to get started.

Would you like this configuration to kick off a Workflow?

○ Start this workflow: _____ ▾

◉ I don't need to start a workflow when this document is generated.

Would you like to run this configuration in Debug mode?

Debug mode saves log files when documents are generated using this configuration.

☐ Run in Debug mode

[SAVE]   [CANCEL]

Administrators then selects Add Template

Administrators then adds the form configuration file

Administrators then select the Word or PDF template

Administrators optionally set which workflow to start

File It Salesforce Package

We have heard countless times from our customers that setting up File It is a complex and difficult process to follow and get right. With the new release of the Salesforce package due out in December, we have taken the guest work out of these tasks. Areas of focus include the following:

- **Connecting a Salesforce org to a SpringCM Account:** Now directly from Salesforce, you can now follow a guided wizard that allows you to pick the SpringCM environment and corresponding SpringCM Account that you want to connect.
- **Setting up File It on a Salesforce Object:** You no longer need to know Salesforce syntax to define how you want to name SpringCM folders created for each object and where these folders are placed in your SpringCM folder tree. A guided wizard allows you to pick the object and use fields associated to that object and its related objects as you define your folder structure. We have also made it significantly easier to add the Visual Force page to each object.

Other Enhancements

In addition to these new features, SpringCM has delivered the following enhancements in this Release:

- **OAuth Approval Page:** If you use any of the SpringCM applications or use an OAuth 2.0 Web Server flow, the Approve page is formatted and styled consistently with the SpringCM login page.
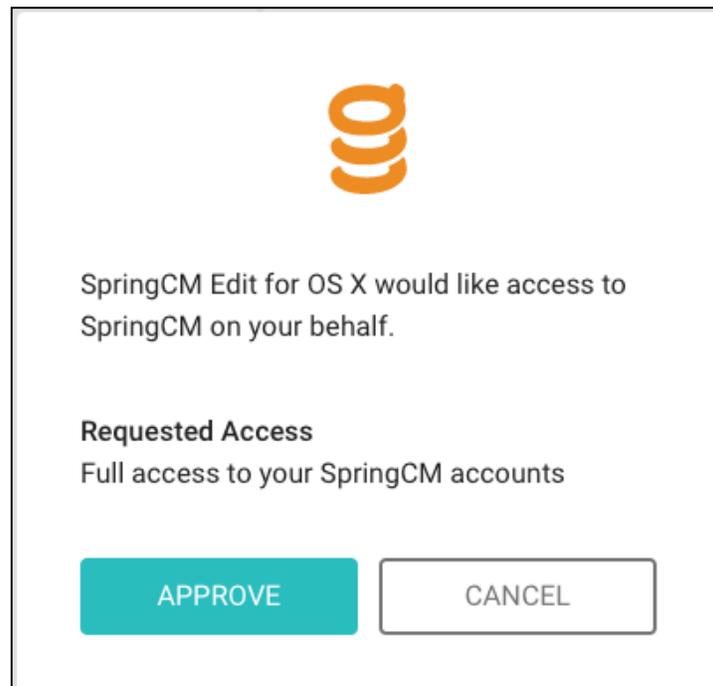
Fixes

Summary	Components
Improved messaging when the Document Builder template generates keys with the same name to make it clear which XML Node is being used twice or more.	Document Builder
Fixed an issue where the recipient was able to upload multiple documents in completing External Review.	External Review
Fixed an issue where External Review was inconsistently cased (in some cases, it was lower case and in other cases, it was upper case).	External Review
Fixed an issue where the "Tell us who you are" dialogue was grammatically incorrect.	External Review
Fixed an issue where an Access Denied error is returned when previewing a document as PDF and refreshing the age quickly.	Preview

Known Issues

- SpringCM is excited by the improvements that Salesforce is making with the Salesforce Lightning experience. Salesforce will continue to improve the Lightning experience adding new features with each subsequent release. SpringCM currently recommends not to upgrade to the Lightning experience without properly testing your solution in a sandbox environment and being prepared to make a set of changes, specifically to custom buttons.

- - Custom buttons that call URLs are not currently supported in the Lightning Experience. If you upgrade to the Lightning experience and launch Document Launcher or Document Package Builder through a custom button, you will find that these buttons do not display on the page in the Lightning experience. You can still go back to Classic Mode to use these custom buttons.
  - SpringCM Content gets cut off in the Lightning Experience.
- Salesforce has acknowledged and is currently fixing a bug in their Winter release that prevents Track It from functioning in the Salesforce 1 mobile app.
- There are a small number of pages that do not currently reflect branding changes created with the new Branding Preference page. The following pages have been identified and will be addressed in the next release:
  - Public share page
  - Change password page
  - Share document panel
  - Compare documents panel
- When configuring Templates associated with a Doc Launcher configuration, helper text can overlay the actual Template name. This occurs only when configuring templates; it does not impact the end user experience.
- A Doc Launcher configuration can not be saved if you have logged into Salesforce.
- A system error may occur after selecting Done when Document or Folder History is loaded directly from the File It Grid, Loading the preview or closing the window will work without issue.
- The REST API has been updated to remove the previous endpoint for creating a Document Launcher URL with XML or JSON data. We will be replacing this with a new endpoint to create a new Doc Launcher URL that is compatible with the Doc Launcher Configuration.
- A user on an older Android device may only see the Approve and Cancel buttons when approving access by SpringCM Mobile for Android.