

springcm



## Release Notes

October 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](mailto: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](mailto: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.

## Other Announcements

### 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](#).

On July 22<sup>nd</sup>, Sandbox orgs were automatically upgraded to File It 4.4. Please test this upgrade in your sandbox and report any issues should you find any. After completing this testing, SpringCM recommends that you upgrade File It at your convenience. If File It has not been upgraded to version 4.4 or greater by November 11, 2016 in Salesforce Production orgs, then we will upgrade for you. For all of the details, click [here](#).

### SpringCM Desktop Applications

The current endpoints that SpringCM desktop apps (SpringCM Edit, SpringCM Scan, SpringCM Sync, and SpringCM Mobile for IOS) are expected to be deprecated on November 12, 2016. In conjunction with the August release, SpringCM is releasing new versions of SpringCM Edit and SpringCM Sync. Please ensure that your end users upgrade to the following versions by November 12, 2016.

- SpringCM Sync for Mac: 2.9.1
- SpringCM Edit for Mac: 1.4.2
- SpringCM Sync for Windows: 2.8.7
- SpringCM Edit for Windows: 1.5.17

## Enhancements

### External Review Improvements

Completing reviews with outside parties is a critical step in any approval process where internal and external parties are collaborating around key documents. You can now collaborate on up to ten documents through this process.

#### Send multiple documents

Once you have selected a document to send out for external review, you can add other documents by selecting Additional Documents from the left hand panel. Selecting this will open the current folder and allow you to select documents from this folder or other folders that you have access to. Once you have finished your selection, select Apply.

The screenshot shows the 'Send for External Review' dialog box on the left and a 'Choose Documents' window on the right. The dialog box includes fields for Recipient (Joe Manager), Also Notify, Due Date (11/11/2016), Email Subject, and Email Message. The 'Choose Documents' window displays a file explorer view with a search bar and a list of documents under the folder 'Burlington Textiles Corp of America'. The list includes: NDA - Burlington 2016.docx, SOW - Burlington 2016.docx (checked), Corporate Overview.pptx, MSA - Burlington 2016.docx (checked), ROI Analysis.xlsx, and Product\_Data\_Sheet.pdf. An 'APPLY' button is visible at the bottom of the document selection window.

#### Complete with multiple documents

If multiple documents have been sent out to you, you will see an icon to the left of Download that indicates how many documents have been sent out. To cycle through each document, first

click on the icon to the left of the Download icon and then choose the document that you want to look at it. You will need to look at each document in order to download and make changes.

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Chris Van Horn requested your review

Give your feedback  
DUE BY 11/10/2016

Enter your comments

Drag & drop to  
Upload a new version  
or  
SELECT A FILE

COMPLETE REVIEW

NDA - Burlington 2016.docx

3 Documents for Review

- MSA - Burlington 2016.docx
- SOW - Burlington 2016.docx
- NDA - Burlington 2016.docx

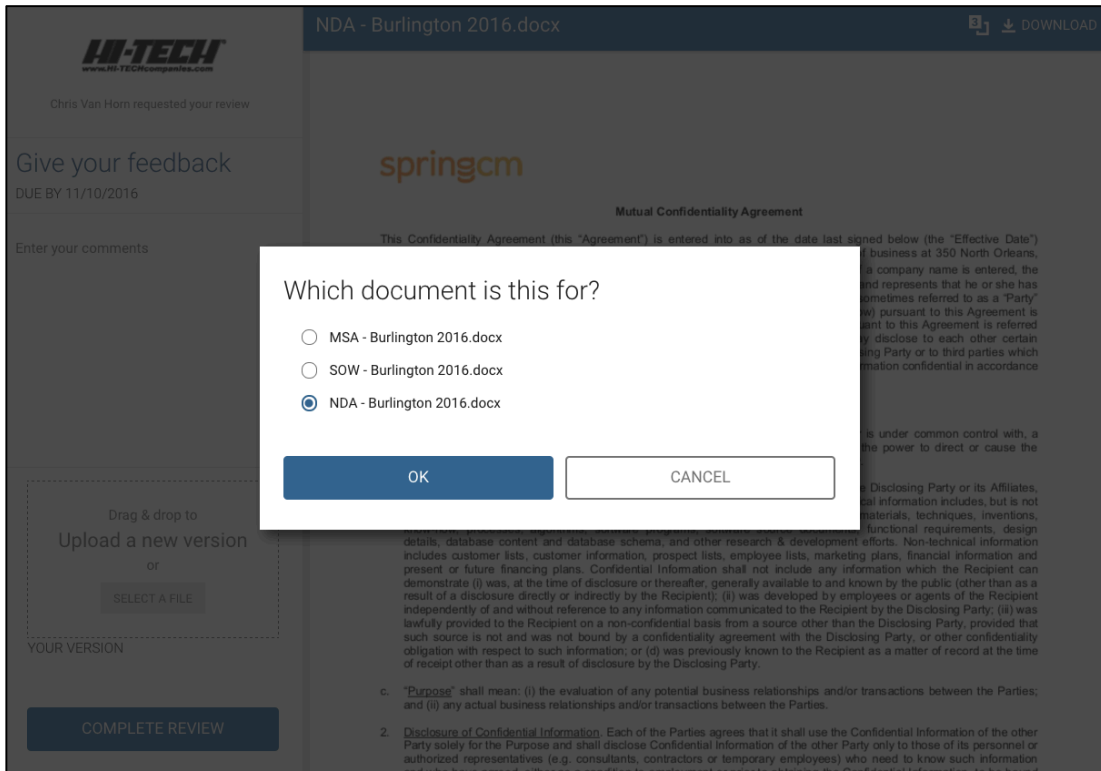
**springcm**

**Mutual Confidentiality Agreement**

This Confidentiality Agreement (this "Agreement") is entered into as between SpringCM Inc., a Michigan Corporation ("SpringCM"), having Suite 900, Chicago, Illinois 60654 and Intitech at 123 Main Street, Chicago, IL 60607. If a company name is entered, the person signing this Agreement acknowledges that he or she is binding the entire company and represents that he or she has the authority to do so. Each of SpringCM and the company or individual named herein are sometimes referred to as a "Party" or collectively as the "Parties." A Party disclosing Confidential Information (as defined below) pursuant to this Agreement is referred herein as a "Disclosing Party" and a Party receiving Confidential Information pursuant to this Agreement is referred herein as a "Recipient." In connection with the Purpose (defined below), the Parties may disclose to each other certain business, technical, and other information which is proprietary and confidential to the Disclosing Party or to third parties which have entrusted such information to the Disclosing Party. The Parties agree to keep such information confidential in accordance with the terms and conditions of this Agreement as follows:

- Definitions.**
  - "Affiliate" shall mean any person or entity which directly controls or is controlled by, or is under common control with, a Party to this Agreement. For this purpose, "control" means the direct possession of the power to direct or cause the direction of the day-to-day management, operation, and policies of such person or entity.
  - "Confidential Information" shall mean any and all non-public information concerning the Disclosing Party or its Affiliates, regardless of form, including proprietary technical and non-technical information. Technical information includes, but is not limited to, information containing or related to patents, trade secrets, copyrightable materials, techniques, inventions, know-how, processes, algorithms, software programs, software source documents, functional requirements, design details, database content and database schema, and other research & development efforts. Non-technical information includes customer lists, customer information, prospect lists, employee lists, marketing plans, financial information and present or future financing plans. Confidential Information shall not include any information which the Recipient can demonstrate (i) was, at the time of disclosure or thereafter, generally available to and known by the public (other than as a result of a disclosure directly or indirectly by the Recipient); (ii) was developed by employees or agents of the Recipient independently of and without reference to any information communicated to the Recipient by the Disclosing Party; (iii) was lawfully provided to the Recipient on a non-confidential basis from a source other than the Disclosing Party, provided that such source is not and was not bound by a confidentiality agreement with the Disclosing Party, or other confidentiality obligation with respect to such information; or (iv) was previously known to the Recipient as a matter of record at the time of receipt other than as a result of disclosure by the Disclosing Party.
  - "Purpose" shall mean: (i) the evaluation of any potential business relationships and/or transactions between the Parties; and (ii) any actual business relationships and/or transactions between the Parties.
- Disclosure of Confidential Information.** Each of the Parties agrees that it shall use the Confidential Information of the other Party solely for the Purpose and shall disclose Confidential Information of the other Party only to those of its personnel or

When you are ready to complete the review, you must either enter comments or upload at least one document. After uploading a document, you will need to select which documents these changes replace. If the selected document has not been uploaded, then it is automatically chosen. If the selected document has already been uploaded, then you will need to choose which document these changes replace.

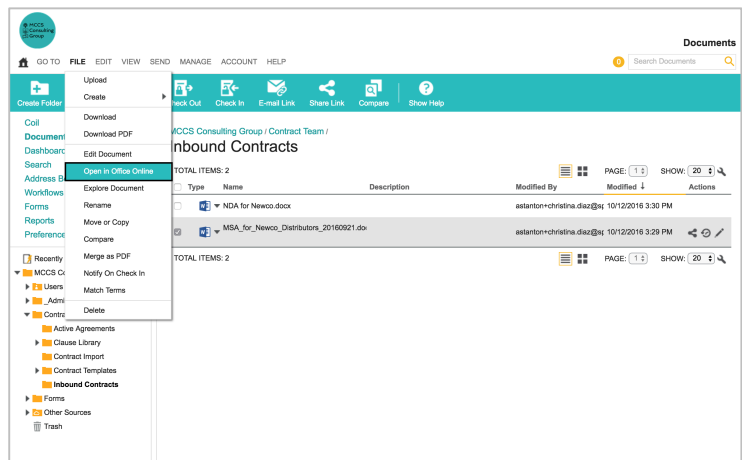


## In-browser Editing using Microsoft 365

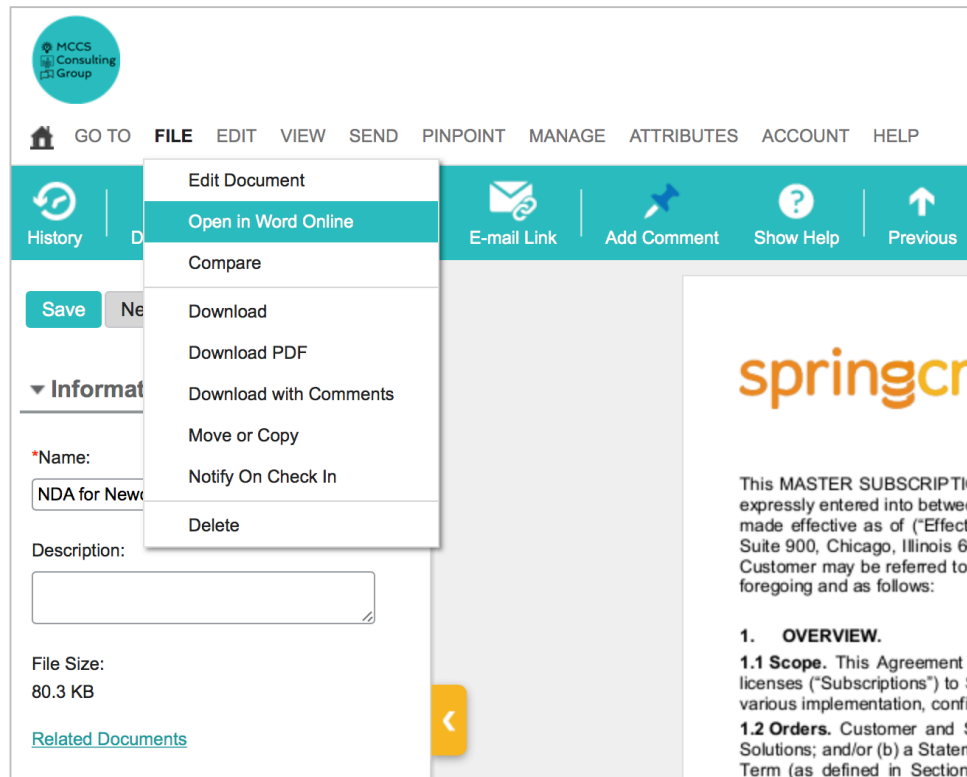
SpringCM is proud to announce an exciting new feature developed in partnership with Microsoft. Using Microsoft's new Office Web App technology, users can now quickly and easily open any Word, Excel or PowerPoint document stored in SpringCM and make changes direct in the browser without downloading the document to the desktop.

There are two options for accessing this functionality. When browsing your folders in the Documents tab, simply select an Office document and use the **FILE->Open in Office Online** menu option to launch the relevant Office 365 app (e.g. Word, Excel, PowerPoint).

The browser window will automatically change to become a fully functioning Office application where you can make and save changes to the document.



Alternatively, users can access the feature after opening a document for previewing. Use the *FILE->Open in Word Online* menu option while previewing to launch Microsoft Word. The menu option text will automatically change to reflect the appropriate tool when previewing an Excel or PowerPoint document.



After you are finished with your changes, simply exit the Office 365 application and return to your previous page in SpringCM. A new version will automatically be saved to the folder and recorded in the document's history audit trail.

Once this feature is enabled in your account, there is no additional configuration required. Users with the appropriate *Edit* permissions will immediately be able to use the in-browser editing features and save their work in SpringCM as a new version of the document.

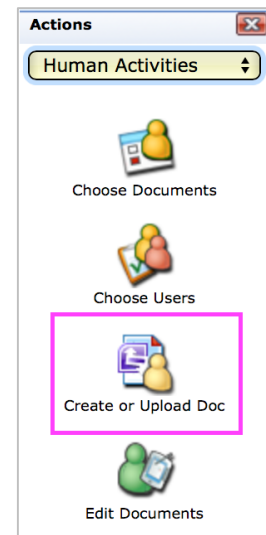
*Note that you must be a licensed user and have already authenticated with Office 365 to utilize this feature. SpringCM does not resell Microsoft Office 365 but encourages customers to contact Microsoft directly for more information about this product.*

## Doc Launcher as Workflow Step

Doc Launcher is available as a human step in SpringCM's Advanced Workflow. The powerful new feature that provides a single solution for generating new documents and uploading third party files to start workflows can now be used in an automated document workflow.

The new human step is called *Create or Upload Doc* and is available in the Human Activities collection in SpringCM's Workflow Designer. Simply drag the step onto the canvas and configure it using the properties sheet.

The Doc Launcher workflow step uses an existing Doc Launcher Configuration that an Administrator set up in the Preferences section. You can use Doc Launcher Configurations for either standalone SpringCM or Salesforce environments.



*Note that Advanced Workflow is a premium feature and may not be available in your account. Contact your Sales or Customer Success Representative for more information.*

When wired into an Advanced Workflow, the *Create or Upload Doc* step will create a new Inbox task that uses the familiar Doc Launcher interface to give users the option to generate or upload documents in the middle of a workflow. This is useful when there is a choice about which template to use or when additional data is needed from the user before a new document can be added to the system.

The output of the Doc Launcher (generated doc or uploaded doc) will be available to downstream steps in the same workflow through a custom workflow variable.

If you already have Doc Launcher Configurations in your account, it takes only minutes to fold them into your workflows. Create new contracts using data from Salesforce or upload third party agreements easily with SpringCM's automated document workflow.

## Other Enhancements

SpringCM has also delivered the following enhancements in this Release:

- **API:** From the document object, you can now get a list of related documents if available.
- **SpringCM Edit for Windows:** Documents that are explicitly checked out in the SpringCM user interface will remain checked until the user cancels the checkout. Every time the document is saved locally, a new version of the document will be uploaded to SpringCM but the document will remain checked out. The user must cancel the checkout when finished. The new version of Edit for Windows is 1.5.18.



- **Workflow buttons:** When enabling the “User Waits For Next Step” option in a human activity in Advanced Workflow (e.g. *Approve Document*), the system will change the label of the button from DONE to NEXT to better indicate that a subsequent step will follow. This allows workflow developers to create a more wizard-like experience when intentionally sequencing multiple steps for the same user.
- **Workflow documents list:** The dropdown control over the document preview no longer lists related documents that are currently in the Trash.
- **Doc Launcher Form improvements**
  - The Field Name can now start with two characters instead of three characters.
  - Required has been relabeled ‘Require user input’
  - Visible has been relabeled ‘Hide this field from user’
  - Read-only has been relabeled ‘Allow user to edit field value’
  - Users can no longer copy, check out, check in, edit, or send a document launcher form for external review.
- **Doc Launcher no longer in beta:** With this release, we have removed the *beta* label in the Doc Launcher Preference section. While we will continue to make additional enhancements to this feature over the coming months, we are confident in the current state of Doc Launcher and encourage all customers to incorporate it in their own implementations.
- **Subject Line Customization for DocuSign:** you can now edit the subject line on E-signature emails. This functionality is available in our UI and Workflow. Subject line editing is only available for DocuSign users as Adobe E-sign does not support this functionality.

### Send for Electronic Signature

 .docx

 Preview

#### Signers and Message

\*To: *Signatures will happen in the order below.*


Cc:

Subject:

Message:

#### Options

Signatures can happen in any order

This signature transaction will expire on  

SEND

CANCEL

## Fixes

Summary	Component
Fixed an issue where adding an option to a Dropdown or Radio Button in Doc Launcher Forms returned an 'Invalid key-pair' error.	Doc Launcher Forms
Fixed an issue where a value added to a Drop Down or Radio Button Field that includes a ' or a & showed improperly for the end user	Doc Launcher Forms
Fixed an issue where validation checks could be missed if two fields are added in succession and the first field is then immediately selected	Doc Launcher Forms
Fixed an issue where a document would remain checked out if the Review and Send for External Review workflow step failed	Workflow (External Review)
Fixed an issue where a user assigned a task is unable to complete the Review and Send for External Review step from the Activity Panel.	Workflow
Fixed an issue where a user assigned a task is unable to complete the Review and Send for Signature step from the Activity Panel.	Workflow
Fixed an issue where loading a group with more than 100 group members returned a 'No resources available error.'	Workflow
Fixed an issue where paging through results in collections greater than 20 items returned incorrect links to the next set of results.	API
Fixed an issue where executing a search with invalid field value returned the wrong error message.	REST Webservices
Fixed an issue where a 500 error was returned when expanding on a workitem tied to a Review and Send for External Review or Review and Send for Signature.	REST Webservices
Fixed an issue where paging through expandable collections returned inconsistently results	REST Webservices
Fixed an issue where Send SpringCM E-mail feature was sending to a distribution list that included invalid emails, specifically emails for users not currently in the Address Book	Send SpringCM E-mail
Fixed an issue where new passwords were not being properly masked on the Reset Password page.	Reset Password

## Known Issues

- If the Review and Send for External Review step is assigned to a user who has View access to one or more of the documents and the subject of the email message is greater than 50 characters, then the full subject may not be viewable.
- If the Review and Send for External Review step is assigned to a user who has View access to one or more of the documents, it is hard to tell that the date field is not editable.
- Two warning messages are returned when a user tries to send a document out for External Review that is already checked out.
- If a user who is completing External Review deletes a pending upload, a mouse over message is left on the screen underneath the upload panel.

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