



springcm

Release Notes

September 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 4 has been deprecated with this release. Any calls made to SOAP Version 4 end point will result in a 500 Server Error. Please upgrade to a newer version, ideally the most current version of SOAP or consider migrating to SpringCM's REST API for the same functionality.



Enhancements

Clause Libraries v2.0 with SXTerm documents

As organizations grow in size and engage in larger and more complex contract processes with their own customers, partners, and vendors, they inevitably look for better tools to manage their contract templates and the commonly used legal language that is used to execute them. Legal teams and Contract Administrators will create and control distinct clause libraries when the use of spreadsheets no longer supports the business.

SpringCM is expanding its support for building and managing clause libraries with a new SpringCM Extension document type called **SXTerm**. Use the new SXTerm to organize all your clause language into first-class documents in your cloud repository.

You create a term document to collect one or more term options in a single place. For example, if your Legal team has a standard clause for Limitation of Liability that it is preferred but has also provided a fallback clause as alternative language for contracts, then you can keep those two options in a single Limitation of Liability SXTerm document.

It is easy to create and edit SXTerm documents and to add or remove individual options related to a given term. And because SXTerm documents behave like any other document in your SpringCM repository, they natively inherit all the same features. This means you can version, relate, index, search, rename and view the full audit history for any SXTerm in your library.

You can find the option to create new SXTerm documents in the FILE menu. Clicking on an existing SXTerm document will open the same window.



The screenshot shows the SpringCM Documents interface. At the top, there is a navigation bar with 'GO TO', 'FILE', 'EDIT', 'VIEW', 'SEND', 'MANAGE', 'ACCOUNT', and 'HELP'. Below this is a toolbar with icons for 'Create Folder', 'Upload', 'Download', 'Check Out', 'Check In', 'E-mail Link', 'Share Link', 'Build Custom Doc', 'Build Simple Doc', 'Build Headless Doc', 'Build It', and 'Show Help'. A search bar is located on the right side of the navigation bar.

The main content area is titled 'Hi Tech Companies / Libraries / Contract Clauses'. It displays a table of 6 items. The table has columns for 'Type', 'Name', 'Description', 'Modified By', 'Modified', and 'Actions'. The 'Limitation of Liability.sxterm' document is selected, indicated by a checkmark in the 'Type' column.

Type	Name	Description	Modified By	Modified	Actions
<input type="checkbox"/>	<input type="checkbox"/> Audit Rights.sxterm	Clauses related to audit rights	sjones@springcm.com	8/13/2015 2:30 PM	
<input type="checkbox"/>	<input type="checkbox"/> Indemnification.sxterm	Clauses related to indemnification	sjones@springcm.com	8/13/2015 2:30 PM	
<input type="checkbox"/>	<input type="checkbox"/> Initial Term and Renewals.sxterm	Clauses related to renewals	sjones@springcm.com	8/13/2015 2:31 PM	
<input type="checkbox"/>	<input type="checkbox"/> Invoices and Payments.sxterm	Clauses related to invoices and payments	sjones@springcm.com	8/13/2015 2:31 PM	
<input checked="" type="checkbox"/>	<input type="checkbox"/> Limitation of Liability.sxterm	Clauses related to liability limitations	sjones@springcm.com	8/13/2015 2:31 PM	
<input type="checkbox"/>	<input type="checkbox"/> Termination.sxterm	Clauses related to early termination	sjones@springcm.com	8/13/2015 2:31 PM	

Use SXTerm documents to easily create whole clause libraries in SpringCM

The screenshot shows the SpringCM SXTerm editor interface for the 'Limitation of Liability.sxterm' document. The interface is divided into several sections:

- Header:** 'Limitation of Liability.sxterm' with a progress indicator '8 / 100'.
- Standard:** A text area containing the main clause text, numbered 1 through 5.
- Option Text:** A text area containing the text for the selected option.
- Option Notes:** A text area containing notes for the selected option.
- Buttons:** 'SAVE', 'CANCEL', and 'Delete this Option'.

The 'Standard' section contains the following text:

1. Liability Limited to Landlord's Interest. The liability of Landlord to Tenant for any default by Landlord under the terms of this Lease shall:
 - a. be limited to the actual interest of Landlord and Landlord parties in the Premises, and;
 - b. Tenant agrees to look solely to Landlord's interest in the Premises for satisfaction of any liability.
2. No Personal Liability. Landlord and the Landlord Parties shall not be personally liable, in any manner whatsoever, for any judgment or deficiency with respect to this Lease;
3. No Liability for Damage. Landlord shall not be liable for any damage to property or person, except for wrongful acts or negligence of Landlord and Landlord parties;
4. Waiver of Special or Punitive Damages. Tenant hereby waives all claims against all Landlord Parties for consequential, special or punitive damages allegedly suffered by any Tenant Parties, including lost profits and business interruption;
5. Period of Ownership. The liability of Landlord under this Lease is limited to its actual period of ownership of title to the Premises.

Use SXTerm documents to manage multiple options for each term as well as notes to help guide proper use

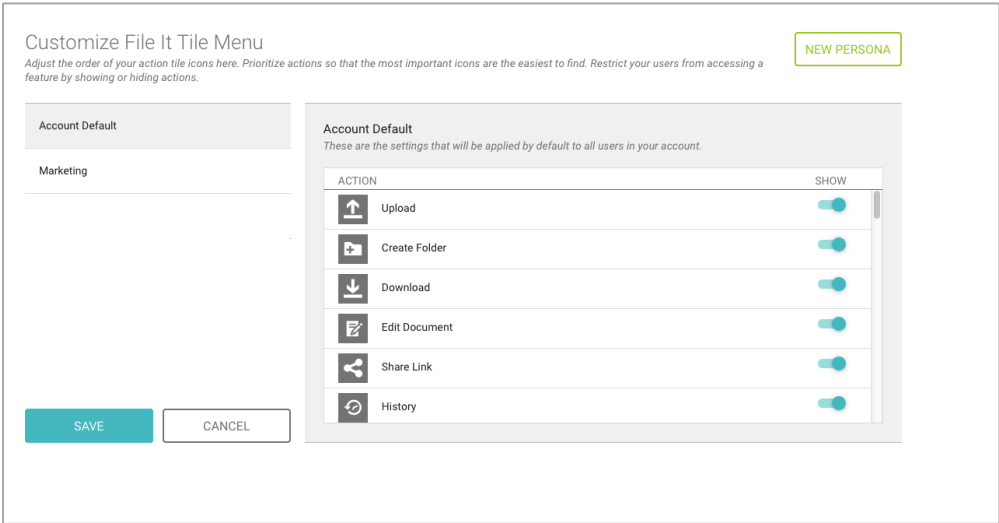


SXTerm documents can be used with SpringCM's document generation tools to greatly simplify the development of templates and the use of forms to control what language is ultimately used for all new generated documents.

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

Custom Action Tile Creator for File It

SpringCM has improved the management of menu action tiles for File It and Get It. You can now create, sort and hide actions for groups of users called personas. Completely customize the actions configured so that each group only sees the actions that are relevant to their job function. The Administrator can set which actions display and in what order within File It and Get It they are shown. This means that actions the Administrator can be hidden from view as well as ordered in a way that is tailored for their use. The user experience for each team will be improved as they only see the actions that they can perform and they see the actions in the order in which they are more likely to encounter them.



Start the Customize Tile Menu page to tailor your menu actions for your users.



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			

Other Enhancements

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

- **SFTP** – SpringCM now supports connecting to our SFTP servers using a public and private key pair. Users who would like to connect using a public key will need to upload their public key into SpringCM. Consult your SFTP client for best practices on how to store and create your public and private key pair.

The public/private key pair authentication feature is optional. You can continue to use the password authentication without any changes and upgrade to the new authentication scheme at any time.

- **Workflow Start Step** - Building on the changes that were delivered in the August 2015 SpringCM Release, a workflow designer can now create a new workflow by selecting Params or by specifying that the workflow will be started by a Smart Rule.
- **Passwords** – As part of our ongoing initiative to strengthen the SpringCM Platform security story, we are improving the algorithm that generates the password hash for each user. The impacts of this change are as follows:
 - If a user logs in to SpringCM using their password within the next 90 days, then the hash will be updated automatically. The user's password hash is updated and no additional actions need to be performed.
 - If a user has not logged into with a password within 90 days, then they will be forced to reset their password. When the password is reset, the new password hash is saved.



- **SSO** - We have introduced a site agnostic SSO endpoint that allows SSO providers (like Okta or Ping) to update their connectors to support all of our data centers. The end point for Production is <http://login.springcm.com/sso>. Site specific endpoints are still enabled.
- **External Review** - We have made a number of improvements to External Review:
 - When completing External Review, the maximum number of characters that a user can enter as a comment is now 750 characters. As comments are being entered, the user can easily see how many characters have been used.
 - A new confirmation dialog has been added when the user selects Complete Review to ensure that the user is ready to complete the review.
 - In the event that the original recipient has misplaced the external review email, the sender or a Super Administrator can now resend the email to perform the review.
- **REST API** - When expanding the attribute group definition from the attribute group endpoint, `Repeating` has been updated to `RepeatingAttribute`. This represents a change to how the API previously worked and you will need to update your implementation.
- **Search Enhancements** - We have improved the search experience in SpringCM by
 - Allowing users to see which folders contain documents.
 - Allowing users to return back to their search results through prominent “Back” links.

Fixes

Fixed an issue where the "Add my signature to this email" checkbox option was very small in Internet Explorer 9 and 10 when Sending for External Review.	External Review
Fixed an issue where a document remained checked when external review expired if the user was deleted	External Review
Fixed an issue where sending out a document for External Review to an invalid email address was not handled correctly.	External Review
Fixed an issue where updating the Watched Document List via the REST API did not write a document history entry.	REST API
Fixed an issue in REST API documentation where system was spelled incorrectly when reviewing folderparams.	REST API
Fixed an issue where a user is unable to complete sending for signature if the user is logged in to SpringCM via an Okta SSO connection.	Electronic Signature



Fixed an issue where a user is unable to upload a document if the browser session has been idle for 20 minutes.	Upload
Fixed an issue where some documents containing Chinese characters were not being rendered properly in the PNG rendition of the generated PDF document.	Document Preview
Fixed an issue with External Review where an invalid recipient email address was not properly handled and now returns a bounce back email.	Send SpringCM Email
Fixed an issue where if a SpringCM Case was deleted, the folder was not moved to the Trash.	Case Mgmt
* Fixed an issue where a user is unable to upload a new document if they have uploaded multiple documents in succession.	Upload
* Fixed an issue where a user is unable to copy and paste more than a 1000 documents or folders.	Browse Documents
* Fixed an issue where a user is unable to set the font when using the Rich Text Editor in Document Builder.	Document Builder
* Fixed an issue where a user would be unable to reset their password if the user in a SpringCM Account in the Las Vegas Data Center (NA21)	Login Page

* Fixes highlighted with an * were deployed on September 25, 2015.

Known Issues

- The SpringCM Mobile App has not yet been updated to support iOS 9. If you intend to use the SpringCM Mobile application, we recommend that you do not upgrade your device until we release an update that supports iOS 9.
- Deleting a custom action tile after adding it to the File It or Get It tile menu will throw a system error.
- When completing External Review, it is possible to select multiple documents to upload. Only the first one would be used in completing External Review.

