

SMARTDOCS 2014.1 RELEASE NOTES

SmartDocs 2014.1 is a new release for SmartDocs that contains new features, enhancements to existing features, and fixes to existing SmartDocs functionality. SmartDocs 2014.1 is also the first SmartDocs release that supports direct integration with Microsoft Excel.

In order to take advantage of new enhancements to reusable variables and conditional tags, you need to perform a simple upgrade to your SmartDocs repository before you will be able to upload reusable variables and conditional tags from SmartDocs to your repository. Please refer to the SmartDocs Repository Upgrade section at the end of these release notes to upgrade your SmartDocs repository.

HOW DO I DOWNLOAD AND INSTALL THIS RELEASE?

You can download SmartDocs 2014.1 from the SmartDocs downloads page:

<http://www.thirtysix.net/smartdocs/downloads.aspx>

After downloading the SmartDocs 2014.1 installer, close all instances of Microsoft Word and execute the installer. After installation has completed, launch Microsoft Word and you can begin using SmartDocs.

If you have a previous version of SmartDocs installed, you will need to uninstall this previous version before installing SmartDocs 2014.1. You can uninstall SmartDocs using **Add/Remove Programs** (Windows XP) or **Programs and Features** (Windows Vista; Windows 7; Windows 8) in your Windows control panel.

If you have previously activated SmartDocs on your computer, then no activation is required for SmartDocs 2014.1. If you have not yet activated SmartDocs on your computer, then activation will be required before you can begin using SmartDocs 2014.1. SmartDocs can be activated from the SmartDocs ribbon in Microsoft Word (**SmartDocs** ribbon tab > **About** menu > **Activate SmartDocs** item).

ARE MY CURRENT DOCUMENTS COMPATIBLE WITH THIS RELEASE?

Yes, SmartDocs 2014.1 is fully compatible with any document that contains SmartDocs content or data that was created in a previous version of SmartDocs. No document or content conversion is required.

WHAT ARE THE NOTABLE CHANGES IN THIS RELEASE?

The complete list of enhancements and fixes is provided later in these release notes. The most notable of these improvements include the following:

- Full text search capabilities for reusable snippets.
- The ability to browse for reusable snippets directly from the SmartDocs task pane.
- SmartDocs functionality is now available in Microsoft Excel.

- More conditional tag colors.
- New usage tracking reports so you can clearly see what snippets are being used in your documents.
- SmartBuilder enhancements, including the ability to create multiple SmartBuilders in a single document and the ability to launch SmartBuilders directly from your document content.
- The ability to create repository-level reusable variables and conditional tags in one step without being required to go through the “upload to repository” process.
- Automatic updating of your SmartDocs licensing information. No need for you to re-activate SmartDocs when your subscription has changed.

DO I NEED TO UPGRADE MY SMARTDOCS REPOSITORY?

Yes. In order to accommodate new functionality for reusable variables and conditional tags, minor upgrades to your SmartDocs repository are required. This upgrade process is simple and can be performed by any user who has **Manage Lists** permission in SharePoint. Follow the instructions in the SmartDocs Repository Upgrade section at the end of these release notes to upgrade your SmartDocs repository.

WHAT IS NEW IN THIS RELEASE?

SmartDocs 2014.1 contains enhancements that are not available in previous SmartDocs releases. A summary of the enhanced functionality is provided below.

GENERAL

- [E-14072067] Added support for SmartDocs functionality in Microsoft Excel. You will now see a SmartDocs tab in the Excel ribbon, and you search for and insert reusable snippets into an Excel document.
- [E-14072053] Added support for single sign-on for Office 365 users using an organization’s Active Directory Federation Services (ADFS) server.

USER INTERFACE

- [E-13275070] Optimized space available in SmartDocs task pane by automatically hiding the **Snippet Content** and **Conditional Content** areas when your Microsoft Word cursor is not currently inside of a reusable snippet or conditional text.

REUSABLE VARIABLES

- [E-13275072] Added the ability to create repository-level reusable variables directly from the New Reusable Variables dialog.
- [E-14013034] The “Edit All Variables” feature is now available to Express Edition users.
- [E-13259037] Added the ability to find the next instance of a specific reusable variable in the document.

- [E-13232098] Reusable variables that publish as a hyperlink can now have a value assigned that is different from the hyperlink.

REUSABLE SNIPPETS

- [B-13242035] Fixed an issue where snippet metadata with long names was not displaying properly when creating a new snippet.

CONDITIONAL TEXT

- [E-13275048] Added the ability to create repository-level conditional tags directly from the New Conditional Tag dialog.
- [E-13266063] Enhanced conditional tags to support additional colors. When assigning a conditional tag color, you can now select from a list of Microsoft Word highlight colors (still the recommended approach if your document has a small number of conditional tags) or over 40 text shading colors.

DOCUMENT SNAPSHOTS

- [E-13300078] Added the ability to run a custom macro after a document snapshot is published. This enables you to write custom VBA code that SmartDocs will invoke whenever the snapshot is published.
- [E-14072064] Added the ability to change the paper size (e.g., Letter, A4, etc.) when restoring a document snapshot.

SMARTBUILDERS

- [E-13140123] Added the ability to create multiple SmartBuilders for a single template. You can now create any number of SmartBuilders that can be executed at any time to help you assemble a new document.
- [E-13122056] Added the ability to import a SmartBuilder from one template into another template.
- [E-13275046] SmartBuilders can now be executed either in a dialog or in the SmartDocs task pane. When you create a SmartBuilder, you select which user interface option should be used when the SmartBuilder is executed.
- [E-13248071] Table of contents is now automatically refreshed after running a SmartBuilder.

USAGE TRACKING

- [E-14072066] New usage tracking reports so you can clearly see reusable snippets are being used in your documents.
- [E-14072091] Improved support for turning on usage tracking in templates so it is automatically turned on in documents created from those templates.

WHAT ISSUES ARE FIXED IN SMARTDOCS 2014.1?

SmartDocs 2014.1 contains multiple fixes to improve the performance and stability of SmartDocs. A partial list of these fixes is provided below.

GENERAL

- [B-13210108] Fixed an issue where the SmartDocs was unable to connect to the SmartDocs activation service through certain corporate firewalls.
- [B-13212123] Fixed an issue where SmartDocs was displaying a “User Name required” error when attempting to create a repository connection even though “Windows Credentials” was selected.
- [B-14065074] Fixed an issue where an error message was occasionally displaying when attempting to save a document that contains SmartDocs content.

CONDITIONAL TEXT

- [B-13233046] Fixed an issue where the conditional tag color drop down was sometimes displayed off screen in dual monitor set-ups.

DOCUMENT SNAPSHOTS

- [B-12270122] Reusable variables that are configured to use a pick list now display the pick list when working with document snapshots.

SMARTFINDERS

- [B-13301097] Fixed an issue that required you to move your Microsoft Word cursor after deleting a SmartFinder to get SmartDocs to recognize that the SmartFinder had been deleted.

WHAT ARE THE END USER REQUIREMENTS FOR THIS RELEASE?

SmartDocs 2014.1 supports Microsoft Word 2007, 2010, and 2013 running on Windows XP, Windows Vista, Windows 7, or Windows 8.

SmartDocs 2014.1 requires that the Microsoft .NET Framework 2.0 is installed on your computer. Most computers already have the .NET Framework 2.0 installed. If you do not have the .NET Framework 2.0 installed you can download and install it from Microsoft’s website.

WHAT ARE THE SHAREPOINT REQUIREMENTS FOR THIS RELEASE?

SmartDocs 2014.1 supports all editions of SharePoint 2007, SharePoint 2010, and SharePoint 2013, including SharePoint Foundation, SharePoint Standard, and SharePoint Enterprise (also known as Microsoft Office SharePoint Server, or MOSS). SmartDocs 2014.1 also supports SharePoint hosted on Microsoft’s Office 365 platform.

NEED SOME HELP?

If you have a question or need assistance installing or using SmartDocs 2014.1 please send our support team a request using email or the Support Portal on our website:

Email: support@thirtysix.net

Website: <http://www.thirtysix.net/support>

SMARTDOCS REPOSITORY UPGRADE

The steps below describe how to upgrade your SmartDocs repository so it supports the reusable variable and conditional tag enhancements in SmartDocs 2014.1. In order to perform these steps, you must have permission to create SharePoint columns on your SmartDocs Reusable Variable list and Conditional Tag list. If you have Design or Full Control permissions in SharePoint, then you have the ability to create and edit SharePoint columns.

REUSABLE VARIABLE LIST

You must upgrade your Reusable Variables list(s) in SharePoint to support the new enhancements in SmartDocs 2014.1. To upgrade your Reusable Variables list(s), use standard SharePoint functionality to create the following column in your Reusable Variables lists:

COLUMN NAME	COLUMN PROPERTIES	
sdoc_rv_hyperlink	Type	Single line of text
	Require that this column contains information	No
	Enforce unique values	No
	Maximum number of characters	255
	Default Value	(leave blank)
	Add to default view	(checked)

It is critical that the initial column name be entered as shown the table above. Once the column has been created, you can then go back rename it to be more friendly as shown below:

- **sdoc_rv_hyperlink** can be renamed to **Variable Hyperlink**

After creating and renaming this column, your Reusable Variables list columns should look like this (the order of the columns does not matter and may not match exactly what you see below):

Column (click to edit)	Type
Variable Name	Single line of text
SmartDocs ID	Single line of text
Variable Value	Single line of text
Variable Hyperlink	Single line of text
Variable Value Pick List	Multiple lines of text
Is Multiple Lines	Yes/No
Is Locked	Yes/No
Publish Hyperlink	Yes/No
Created By	Person or Group
Modified By	Person or Group

CONDITIONAL TAG LIST

You must upgrade your Conditional Tags list(s) in SharePoint to support the new enhancements in SmartDocs 2014.1. To upgrade your Conditional Tags list(s), use standard SharePoint functionality to create the following column in your Conditional Tags lists:

COLUMN NAME	COLUMN PROPERTIES	
sdoc_ct_formatting	Type	Choice
	Require that this column contains information	Yes
	Enforce unique values	No
	Type each choice on a separate line	Highlight Color Text Shading
	Display choices using	Radio Buttons
	Allow 'Fill-in' choices	No
	Default Value	Highlight Color
	Add to default view	(checked)

It is critical that the initial column name be entered as shown the table above. Once the column has been created, you can then go back rename it to be more friendly as shown below:

- **sdoc_ct_formatting** can be renamed to **Tag Formatting**

You should also make the following change to “Highlight Color” column in your Conditional Tags lists (the “Highlight Color” column already exists in your Conditional Tags lists; you only need to modify it, not create it):

COLUMN NAME	COLUMN PROPERTIES	
Highlight Color	Name	Change from “Highlight Color” to “Tag Color”
	Type	Change from “Choice” to “Single line of text”

After creating and modifying the columns above, your Conditional Tags list columns should look like this (the order of the columns does not matter and may not match exactly what you see below):

Column (click to edit)	Type
Tag Name	Single line of text
SmartDocs ID	Single line of text
Tag Formatting	Choice
Tag Color	Single line of text
Is Locked	Yes/No
Created By	Person or Group
Modified By	Person or Group