



# SpringCM

SPRINGCM

TROUBLESHOOTING GUIDE

Administrator and End User Support



## Contents

- Common Administrative Tasks..... 3**
  - Password Change or Reset..... 3
  - Locked User..... 3
  - Security/Privileges ..... 3
- Documents..... 5**
  - WebDav..... 5
  - Advanced Upload..... 6
  - FTP..... 6
  - Document History ..... 6
- Preferences ..... 8**
  - My Preferences/Login Delegate ..... 8
  - Account Preferences..... 8
  - Account Security ..... 9
  - Document Rules..... 9
- Search ..... 10**
- Advanced Workflow ..... 12**



## Common Administrative Tasks

### Password Change or Reset

For User:

1. Use the Reset Password link on the Login Page or
2. Preferences>Change My Password

For Administrators:

1. Address Book>Check User Profile checkbox
2. Manage>Reset Password

A reset password email will be sent to the selected User.

### Locked User

Administrators:

The locked user's icon in the address book will appear a red slash. To unlock:

1. Address Book>Check locked User Profile checkbox
2. Manage>Unlock User

### Security/Privileges

To Check a User's Security settings:

1. Check the User's Profile in the Address Book for Role and Security Group Membership
2. Select the folder or document checkbox, or preview the document
3. Select Manage>Security

Roles and Security Group Privileges are displayed. Click the Show Effective User Security checkbox to quickly see all users' security settings for the specific folder or document.



To discover where a user's security settings are established, follow these steps:

1. **Check to see if the user is a super administrator.** Super Administrators have access to all folders and documents, thus need no explicit or effective security settings. If the user is NOT a super administrator, proceed to the next step.
2. **Check to see if the user has explicit settings.** If yes, the user's security settings have been established at this level. If the user does NOT have explicit settings at this level, proceed to the next step.
3. **Check to see if the user is a member of a security group with explicit settings.** If yes, the user's security settings have been established at this level. If the user does NOT have explicit security group settings at this level, proceed to the next step.
4. **Check to see if the user is a member of multiple security groups with explicit settings.** If yes, the least restrictive group (i.e. - the one that provides access to the most folders and documents) takes precedent. If the user is NOT a member of multiple explicit security groups at this level, proceed to the next step.
5. **Check to see if the user's user role includes explicit settings.** If the user's user role includes specific security settings, the user's security settings have been established at this level. If the user's user role does NOT contain explicit security group settings at this level, proceed to the next step.
6. **Move up one folder level and perform steps 2-5.** Continue moving up one folder level if none of these steps reveal a user's security settings.

### "I can't login to SpringCM."

- "I forgot/need to change my password."

-Check the Address Book to confirm that the user is active (icon in color) and not locked.  
Refer user to save password link on login page or Preferences>Change My Password

Super Administrators: Check the User Profile in the Address Book and select **Change Password** from the **Manage** menu.

- "When I try to login, I see a message that says my user is locked."
  - Have the user contact his or her Super Administrator
  - **Super Administrators:** Navigate to the Address Book, Find the locked user, click Manage>Unlock User
- Preferences>Account Security
  - Check Login Hours, Login Days of the Week, and Authorized IP Addresses.



### **“A user left the team and I want to remove or limit his or her access.”**

- “This user may return.”
  - Disable User – Change User Role to Guest
- “This user will not return.”
  - Delete User:
    - Select the user’s profile checkbox
    - Select Delete from the Address Book menu
- If user may return:
  - “This user will retain access to the email account that is his or her SpringCM username.”
  - Disable User – Change User Role to Guest
  - “This user will not retain access to the email account that is his or her SpringCM username.”
  - Disable the User by changing his or her role to Guest and requiring a password change on next login.

## **Documents**

### **WebDav**

Use WebDAV to upload documents comprising more than 30 MB and entire folder-tree structures

1. Click the Start button and select My Network Places
2. Click Add a Network Place
3. Click Next and Choose Another Network Location
4. Type “https://webdav.springcm.com” into the Internet address box
5. Enter your SpringCM username and password
6. Follow the remaining steps of the wizard
7. You will be prompted one additional time to enter your username and password to complete the WebDAV setup. **Username must case match the username as it appears in the SpringCM Address Book.**



## Advanced Upload

1. Click the **Documents tab**.
2. Open the **File menu** and select the **Upload feature**, or click the **Upload button located on the Toolbar**.
3. Click the **Advanced Upload Documents link** located in the upper-left corner of the window. (You may experience a short wait while the Java applet loads.)
4. Click the **+ Add Files button**.
5. Select the documents or folders you want to upload.
6. Click the **Add Files button** in the open dialog box.
7. Click the **Upload Files button**.
8. Repeat steps 4 - 7 as many times as desired. Close the Advanced Document Upload window when finished.

## FTP

Use FTP to upload documents comprising more than 30 MB and entire folder-tree structures

- Install an FTP client (SpringCM recommends Filezilla - <http://filezilla-project.org/>)
- In your FTP client, enter `ftp.springcm.com` in the address field
- Enter your SpringCM username and password
- Enter port 21 for FTP, 22 for SFTP
- Your FTP client will connect to SpringCM, and you can begin transferring documents and folders into your SpringCM account

## Document History

View document history by clicking the link in a folder's document list or the History button in the document preview window.

### "I can't see a document in Preview."

- "My document appears with a red x in the corner"  
-User should wait 10 minutes for the document to preview. If the document fails to preview after 10 minutes, contact SpringCM Support.



- “My document is blank, and a banner message says, ‘This document cannot be previewed.’”
  - Ask the user to wait 10 minutes for the document to preview. If the document fails to preview, ask the user to attempt a second upload of the document. If the second attempt fails, contact SpringCM Support.
- “My document is blank, and a banner message says, ‘Preview is not yet available.’”
  - Preview is still rendering, the user should see a preview in 10 minutes. Contact SpringCM Support if the preview does not render or if the yellow banner message is returned.

#### **“I can’t access documents via WebDav.”**

- “A PDF document won’t open in WebDav.”
  - Only MS Office documents can open in WebDav. Download the PDF/open with a PDF viewer.
- “I can’t move or rename a document in WebDav.”
  - Confirm that the user had Edit privileges on the document
  - Confirm that the document isn’t checked out.

#### **“I can’t Edit Documents.”**

- Check user’s privileges on the document for Edit privileges (Manage>Security)

#### **“I can’t find a document in SpringCM.”**

- “I accidentally deleted a document.”
  - Check the Trash folder
  - If more than seven days have passed since the delete and document can’t be found in the trash, contact SpringCM Support.
- “The document isn’t where I expected to find it.”
  - Check the Trash folder
  - “Have you searched for the file?”
    - Search tab - Search by filename or contents, metadata applied to the document, and location (parent folder)

#### **“I can’t move/delete/upload documents.”**

Check user’s privileges by username, Security Group, and role:

- Navigate to the object the users can’t move/upload/delete



- Select **Security** from the **Manage** menu
- Check the user's role, name, or group for Edit privileges.

For Full and Limited Subscribers and Guests:

Check Preferences>Account Preferences>Document Download Permissions

### **"A folder or document is missing."**

- Check the user's Security Settings:
  - Navigate to the object the users can't move/upload/delete
  - Select **Security** from the **Manage** menu
  - Check the user's role, name, or group for Edit privileges
- Check the Trash folder for folders named with dates on or near the date the user last accessed the document.

## **Preferences**

### **My Preferences/Login Delegate**

- Preferences>My Preferences
- Choose A Login Delegate
- Select [Support@SpringCM.com](mailto:Support@SpringCM.com) and a time range

### **Account Preferences**

Use this link to set and check settings for:

- Time Zone
- Download Permissions by Role
- Document Retention Permissions (Full Subscribers Delete)
- Default Start Tab
- Initial Report
- Default Folder Notification Frequency
- Document Types to open with PDF Viewer
- Document Preview Page Features
- Attribute Portability
- Document Expiration Reminder Text/Reply-To Email Address



- Maximum Document Revisions Retained
- Auto Refresh Interval
- Set Simplified Guest View
- Set Document Access Justification
- Advanced Workflow Notification User
- Search Settings (Snippets, Relevancy, Hit Count)

## Account Security

Use this link to set and check settings for:

- Maximum Login Attempts
- Authorized IP Addresses
- Login Days of the Week
- Login Hours

## Document Rules

To configure Rules:

1. Click the **Preferences** tab.
2. Click the **Document Rules** link.
3. Open the **Rule menu** and select the **New** option.
4. Enter a short description in the **Name** field (e.g. - "Expense Report Approval").
5. Select the appropriate event from the **"For Event" drop-down menu**.
6. Select the appropriate filter from the **Filters drop-down menu**.
7. Select the appropriate action from the **Actions drop-down menu**.
8. After completing the For Event, Filters, and Actions steps, click the **Save button**. **The Rule is not yet activated.**
9. **To activate the new Document Rule, click the appropriate check box located to the left of the Document Rule, open the Rule menu, and click the Enable option.** You will return to the list of Document Rules and see a green check mark to the left of the activated Rule. The Rule is now running on your account.



When a Schedule has been configured, four Actions may be executed using the Schedule as Event and Filter:

- Send an Email
- Start a Workflow
- Send a Custom Report
- Move Documents to Trash

**If Rules fail to execute, take the following steps:**

- In Preferences>Document Rules, click the Log flag and check for errors
- A detailed message will be sent to the user who last updated the rule
- Check for proper rule syntax
- If using a Scheduled rule, check that the configuration of the schedule

**“Document Rules don’t work.”**

- “Nothing happens when the triggering event is executed.”
  - Check the configuration of the rule for errors
  - In Preferences>Document Rules, click the Log flag and check for error
  - If no errors were returned, contact SpringCM Support

## Search

Quick search is visible at any location in SpringCM. Advanced Search options can be selected by clicking the **Search** tab.

For a general search, click the **Search Documents** box in the upper right hand corner of SpringCM (just below the logout button). You can enter any terms that might be associated with the file (file name, tags, text on the resume, etc.)

Advanced Search can be executed using information about documents and folders in the following categories:

- **Content** - Enter your query into the Content section for a search that examines all information in documents and folders, including naming conventions. Click the



**Documents check box** and/or the **Folders check box** to further hone your Content search.

- **Properties** - Search for information contained in and "surrounding" documents in the Properties section. In addition to searching in a document's content, you can search by Title, Document Type, Keywords, and similar topics not necessarily found in a document's content.
- **Location** - Search in a specific parent folder or subfolder in the Location section. **Click the "Limit search to folder" check box** and select the desired folder to ensure that only documents stored within those parameters are retrieved.
- **Attribute Groups** - Include or exclude specific attribute groups from your search results in the Attribute Groups section. Select an attribute group from the "Add Attribute Group ..." drop-down menu. To include an attribute group, click the attribute group's check box. To exclude an attribute group, click the Exclude this Group check box. Entering relevant information into all possible text fields will produce better search results.

Super and user administrators can assign saved searches four different roles:

- **Default Basic Search** - When you enter a query into the Search box located in the upper-right corner of all screens, SpringCM will execute the saved search you have specified. Once the saved search is generated, click the Search button.
- **Default Advanced Search** - When you click the Advanced Search link, you will immediately see the saved search you have set as the Default Advanced Search.
- **Default Basic Search for Account** - When account users enter a query into the Search box located in the upper-right corner of all screens, SpringCM will execute the saved search a super or user administrator has set as the Default Basic Search for Account. Once the saved search is generated, click the Search button.
- **Default Advanced Search for Account** - When you click the Advanced Search link, all account users will immediately see the saved search you have set as the Default Advanced Search for Account.

#### **"I can't find a document in SpringCM."**

- "I accidentally deleted a document."
  - Check the Trash folder
  - If more than seven days have passed since the delete and document can't be found in the trash, contact SpringCM Support.
- "The document isn't where I expected to find it."
  - Confirm that the user has executed a Search for the file



- Search tab - Search by filename or contents, metadata applied to the document, and location (parent folder)

-Check the Trash folder

#### **“My search results are incorrect.”**

- Check Search parameters/use of proper search fields
- For Location search, be sure the proper folder and subfolder setting is selected

#### **“Your search parameters are too ambiguous,” error is returned**

- Add quotes to your *Content* area search
- Add the search criteria to the “With this Phrase” field

## **Advanced Workflow**

#### **“My Advanced Workflow is not functioning.”**

- **“I received a Workflow Error Message.”** – Click the link to the workflow Instance in at the bottom of the error email and check the process monitor.
- **“I executed a step and the resulting action wasn’t executed by the system.”**  
**“I don’t see an expected step in my Workflow Inbox.”** -Process Monitor – Updated Today – Check the WF name/time and date of execution – Note status. If the status is **Execution Pending**, contact SpringCM Support.
- **“Steps are taking a long time to execute”** -Process Monitor – Updated Today – Check the WF name/time and date of execution – Note status. If the status is **Execution Pending**, contact SpringCM Support.
- **“My workflow did not start.”**  
Process Monitor – Updated Today – Check the WF name/time and date of execution – Note status. If the status is **Execution Pending**, contact SpringCM Support.