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# SpringCM

## Quick Reference Guide

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## UPLOAD – Upload Documents

This upload method is ideal for uploading just a few documents comprising fewer than 30 MB.

1. In the Documents workspace, click the *Upload* button located on the Toolbar
2. Click the *Browse* button to select your document (repeat for additional documents)
3. Select a folder destination – SpringCM will upload to your Home Folder by default, or you can click the *Select a Folder* radio button to choose a new folder location
4. Click the *Upload* button

*NOTE: You can rename each document at the time of upload. Each time you select and browse to a document, you can rename it in the field located to the right of the Clear button UPLOAD.*

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## UPLOAD – Advanced Upload Documents

This upload method is ideal for simultaneously uploading multiple documents comprising fewer than 30 MB.

1. In the Documents workspace, click the *Upload* button located on the Toolbar
  2. Click the *Switch to Advanced Upload Documents* link located in the upper-left corner of the window
  3. Click the *Add Files* button
  4. Select documents from the windows directory
  5. Repeat steps 3 and 4 as needed
  6. At the bottom of the box, select a folder destination – SpringCM will upload to your Home Folder by default, or you can click the *Select a folder* radio button to choose a new folder location.
  7. Click the *Upload Files* button
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## UPLOAD – WebDAV

WebDAV, a tool similar to FTP, uses a special folder on your computer that is linked directly to your SpringCM account.

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. Enter **https://webdav.springcm.com** into the Internet address box
  5. Enter your SpringCM username and password (case-sensitive)
  6. Follow the remaining steps of the wizard
  7. You will be prompted one additional time to enter your username and password to complete WebDAV installation
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## UPLOAD – SFTP

Use FTP to upload documents comprising fewer than 30 MB and entire folder-tree hierarchies.

1. Install an FTP client (e.g. Filezilla)
2. In your FTP client, enter **sftp.springcm.com** in the address field
3. Enter your SpringCM username and password and Port 22
4. Click *Connect*

Your FTP client will connect SpringCM, and you can begin transferring document and folders into your SpringCM account.

## SEARCH FOR DOCUMENTS

Search Tip: The more specific your search, the better the results. Use entire words (i.e. "Fireman" instead of "Fire") when searching.

1. Enter your search criteria in the text field located in the upper-right corner of SpringCM
  2. Click the Search button
  3. Click the **Advanced Search** link for more options (where you can specify words, phrases, titles, document types, locations, and attributes)
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## SEND DOCUMENTS

Use this option to send copies of documents via email, fax, and postal mail

*To Select Documents:*

1. Click the check box in front of the desired document
2. Open the *Send* menu and choose *Documents Using SpringCM*
3. Continue by selecting recipients

*To Select Recipients:*

1. Search for and select recipients or click the *Add Multiple* button
2. Click the *Done* button

*To Complete Sending Options and Send:*

1. Click the check box for the desired delivery method
  2. If desired, enter Security Options
  3. Click the *Send* button
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## SEND LINKS

This option sends a link to the current version of a document or folder within SpringCM. The recipient must have access rights to the document or folder in SpringCM

1. In the Documents workspace, click the check boxes for the desired documents or folders
2. Open the Send menu and select Links Using SpringCM or Links Using Your Desktop E-mail (the latter option will open your default e-mail program)
3. When sending through SpringCM, include a subject and message

*For Send Documents Using SpringCM, takes these additional steps:*

4. Search for and select recipients or click the Add Multiple button
  5. Click the Send button
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## CHECK OUT/CHECK IN DOCUMENTS

Check Out - Use this option to prevent other users from editing a document you're revising

1. Click the check box for desired document
2. Open the *Edit* menu and choose *Check-out*
3. Click the *Download* button to download the document's raw file



Check In - Use this option to upload revisions to a checked out document

1. Click the check box for desired document
2. Open the Edit menu and choose Check-in
3. Click the Browse button and locate the document
4. After selecting the document, click the *Check in File* button

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## SECURITY

Security settings can be established at the folder and document level

1. From the Documents workspace, click the check box for desired document
2. Open the Manage menu and choose Security
3. Click the drop-down menus for the desired user role(s) (User Administrator, Full subscriber, Limited subscriber, and Guest)
4. When finished, click the *Save* button

*NOTE: A Super Administrator has unlimited privileges on all account objects so no setting option appears for this role.*

The security settings comprise these options:

- No Access
- View
- View & Edit
- View & Create
- View, Edit, & Delete
- View, Edit, Delete, & Set Access

*NOTE: A user's security settings will match the security setting of the parent folder. SpringCM will display security inheritance as "(Effective)", e.g. View & Edit (Effective)*

