Softdocs

Administrator Launch Checklist

August 2026

Administration and Governance Controls

1. Action Required (Canada Region): Capture Applications Suite Upgrades

Virtual Printer 2.0.9 Install Required

Who it affects: Canada region administrators and all Virtual Printer users in the Canada region
Admin action required: Yes, installation required
What admins should do: Confirm that all Canada region Virtual Printer users have installed Version 2.0.9. Users who log in without upgrading will encounter a blank page or errors when uploading. Distribute the Softdocs Virtual Printer Installation Guide to affected users. Web Capture users who see a blank page after the 2026/07/17 upgrade should clear their browser cache and reload.
Notes: The underlying upgrade also enables autoclassification of any document type and improves classification/extraction accuracy, performance, and stability across Web Capture, Email Plugins, Virtual Printer, and Intelligent Transcript Processing.

2. Announcement (U.S. Region): Announcement (U.S. Region): Virtual Printer Version Update to TBD Installation recommended but not required

Who it affects: All Virtual Printer administrators and users
Admin action required: Optional, but recommended
What admins should do: Following the summer launch, there will be several updates to Virtual Printer that will be available by upgrading to the latest version. Updates include more descriptive file names in the document list for documents printed to the Virtual Printer and allowing for passkey MFA. Clients may remain on their current version. Upgrade to the latest (available after the launch) only if you prefer to get the updates described above.
Notes: Do not confuse this with the Canada region requirement in Item 1. U.S. region users will not encounter the blank-page behavior.

Administration and Governance Controls

3. New: Shared Inbox Support in the Outlook Add-In

Who it affects: Administrators and teams that route incoming documents through shared mailboxes
Admin action required: Optional, required only to enable Shared Inbox Support
What admins should do: Decide whether your institution wants shared mailbox filing. If yes, contact Softdocs Support to obtain the updated Outlook Add-In manifest and deploy it following the Softdocs Outlook Add-In Installation Guide. Organizations that do not need shared mailbox functionality can remain on their current add-in version with no action required.
Notes: Removes the need to forward emails or download and re-upload files for shared-mailbox intake, while maintaining permission-aware filing across personal and shared mailboxes.

4. New: Form Group Administration: UI Updated

Who it affects: Central administrators managing form groups
Admin action required: No
What admins should do: Let form group administrators know that clicking the “Form Groups” tile in Central Administration now opens a table view instead of the side-scrolling list. Add, delete, and association management all remain available from the new view.
Notes: This is the first UI migration in the Central Administration experience.

Administration and Governance Controls

6. New: Rich Text Editor Now Available in Form Builder

Who it affects: Form builders and accessibility reviewers
Admin action required: No
What admins should do: Inform form builders that the rich text editor already used in Email Template and Custom Submission Confirmation Page builders is now available in Form Builder, including tables, expanded font options, and an inline accessibility checker. When using the editor in sections with background colors, verify font color contrast with a tool such as WebAIM's Contrast Checker.
Notes: Greater formatting flexibility introduces accessibility risk if font and background colors are chosen without a contrast check. Consider adding a contrast verification step to your internal form review process.

7. Enhancement: Form Builder Element and Usability Additions

Who it affects: Form builders and form originators
Admin action required: No
What admins should do: Share the following new Form Builder capabilities with your form building team

- **Spacer element** - offset columns to align them with columns in other rows (for example, a total column that needs its own row but must sit under a specific column on the right side of the form).
- **Maximum character length on text areas** - optional limit with a live character counter in the bottom right corner.
- **Horizontal layout for checkbox and radio groups** - choose vertical or horizontal orientation, specify the number of rows to distribute options, and optionally hide list labels for a cleaner look.
- **Search within Saved Sections** - search the saved sections list rather than scrolling it.
- **Preview and Forms buttons open in a new tab** - via normal mouse or keyboard operations.
- **Cancel option on the "Start from Draft?" dialog** - originators can now cancel navigation instead of being forced to start a new draft or resume the last one.
- **Attachment element wording updated** - clarifies that only a single file can be uploaded.

Notes: No configuration required; these are available to all form builders immediately.

Administration and Governance Controls

8. Change: Documents Can Now Be Added to Completed Web Capture Batches

Who it affects: Web Capture administrators and batch processors
Admin action required: No
What admins should do: Inform Web Capture users that documents can be added to a completed batch. When documents are added, the batch automatically returns to the appropriate processing queue so work can continue without creating a new batch.
Notes: Completed batches may reappear in processing queues if documents have been added. If your team monitors queue counts or reports on batch completion, account for this behavior.

9. Change: User Directed Routing Icon Updated to a Paper Plane

Who it affects: Central end users using User Directed Routing
Admin action required: No
What admins should do: Let users know the right arrow icon for User Directed Routing has been replaced with the paper plane icon used elsewhere in the application. Update any internal training materials, job aids, or screenshots that reference the arrow icon.
Notes: The arrow was being misread as navigation to another list rather than as sending the package to the next step.

10. Review all Summer Release Resources included in Rolling Release Notes, Blog Post and New Content Search Tips and Trick Guide

11. Subscribe to Softdocs Status Site

Access, Security and Compliance

12. Enhancement: Audit Logging Added for API Client Operations in Etrieve Security

Who it affects: Security administrators and audit/compliance teams
Admin action required: No
What admins should do: Be aware that Etrieve Security now writes audit logs for API Client creation, edits, and deletions. Incorporate these logs into periodic access reviews of API credentials.
Notes: Strengthens the audit trail for integration credentials; no configuration required.

Insights, Reporting and Visibility

13. Enhancement: Filtered and Selected Counts Now Display in Content Tables

Who it affects: Content end users and administrators
Admin action required: No
What admins should do: Let users know that Search Results, Unfiled Inbox, and Recycle Bin tables in the new Content experience now show both the total result count and the count visible after filtering. ***EXAMPLE:*** *"10 of 200 documents." When items are selected, the count also shows the selection, such as "10 of 200 (5 selected)."*
Notes: Filtering does not clear selections. Documents selected before a filter is applied remain selected even when hidden, so the selected count may exceed the number of visible rows. Communicate this to users who perform bulk actions, so they do not unintentionally act on documents outside their current filter.

14. Resolved: Connect Data Exports Converting Numeric Values to Dates

Who it affects: Administrators and reporting teams using Connect Data Exports
Admin action required: Confirm impact
What admins should do: Review recent Connect Data Export output for numeric values that were incorrectly converted to dates. Numeric values that could be interpreted as valid dates are now preserved in their original numeric form. Re-run any exports feeding downstream reports or systems where this conversion may have introduced bad data.
Notes: Downstream systems that already ingested converted values may need to be corrected, the fix prevents recurrence but does not retroactively repair prior exports.

Automation, AI and Integrations

15. Feature: Retrieve Document Key Fields via Content API

Who it affects: Developers and integration owners using the Content API
Admin action required: Optional, review integration opportunities
What admins should do: Share with integration owners that key field values visible in the Etrieve UI can now be retrieved through the Content API alongside document details, for use in integrations, reporting, and downstream workflows such as routing, validating, and organizing documents. Review the Content API documentation.
Notes: Enables automation that previously required manual metadata lookup.

16. Feature: Recycle a Document via Content API

Who it affects: Developers and integration owners using the Content API
Admin action required: Optional, review integration opportunities
What admins should do: Let integration owners know an existing document can now be sent to the Recycle Bin via a recycle action through Content API. The endpoint operates on one document per request and returns a clear success or failure response. Documents remain recoverable from the Recycle Bin. See the Content API documentation.
Notes: Useful for automated cleanup of duplicate or invalid documents identified by downstream systems.

17. Feature: Permanently Delete a Recycled Document via Content API

Who it affects: Developers, integration owners, and records/retention stakeholders
Admin action required: Optional, review integration opportunities
What admins should do: Let integration owners know an existing document in the Recycle Bin can be removed permanently via Content API, with a success or failure response returned for workflow automation. See the Content API documentation.
Notes: This is an irreversible operation performed without UI confirmation. Pair adoption with the new API Client audit logging in Item 12, and confirm the change aligns with your records retention policy before deploying.

Automation, AI and Integrations

18. Feature: Append Pages via Content API

Who it affects: Developers and integration owners using the Content API
Admin action required: Optional, review integration opportunities
What admins should do: Let integration owners know that pages can now be appended to an existing document through Content API. Review any workflows that currently require users to add additional pages, and consider whether those steps can be automated through the API. See the Content API documentation.
Notes: Useful for integrations that need to add supplemental documentation, corrected pages, or follow-up materials to an existing document without replacing the original file.

19. Enhancement: Intelligent Document Processing Now Supports Any Document Type

Who it affects: Web Capture, Email Plugin, and Virtual Printer clients with IDP enabled
Admin action required: Confirm impact
What admins should do: Inform IDP users that classification and extraction are no longer limited to the small set of document types configured during feature onboarding.

- Classification is most accurate for users with access to a smaller, more relevant set of document types (typical end users).
- Users with broad access, such as administrators, may see less consistent results when the same or very similarly named document type exists across multiple areas.
- Similar or overlapping document type names may produce lower confidence classifications.
- Users can still manually select the correct Area and Document Type; key field data continues to auto-extract after selection.
- Notes: Consider reviewing document type naming conventions across areas to reduce ambiguity, and reviewing whether admin accounts need broad filing access for day-to-day capture work.

Automation, AI and Integrations

20. Enhancement: IDP – Cancel Automatic Extraction Without Clearing Manual Selections

Who it affects: Capture application users with IDP enabled
Admin action required: No
What admins should do: Let users know they can cancel automatic extraction without losing a manually selected Area and Document Type, making it easier to switch from auto-classification and extraction to manual indexing whenever preferred.
Notes: Reduces rework for users who prefer manual indexing on specific document types.

21. New: Submit Form API Now Available

Who it affects: Developers and integration owners using Etrieve Central
Admin action required: Optional, review integration opportunities
What admins should do: Let integration owners know the Submit Form API is now available for Etrieve Central, allowing approved integrations to submit Form Builder forms programmatically without requiring users to manually submit through the Central UI. This supports scenarios such as submitting form data from an external system, automating intake processes, and creating form submissions through integration workflows. API-based submissions follow the same backend validation as standard Form Builder submissions; required fields and validation rules must still be satisfied before a submission is accepted. Review the Central API documentation, or work with your Softdocs representative for setup and implementation guidance.
Notes: Enables integration-driven form submission without manual UI interaction; validation behavior matches standard submissions, so no new validation logic needs to be built or maintained separately.

Automation, AI and Integrations

21. New: Set Up Content Automation to Send Transcripts to ITP

Who it affects: Content administrators managing transcript filing and ITP administrators
Admin action required: Yes, setup required to enable
What admins should do: Configure a Content Automation to send transcript documents from Content to ITP. A new automation action, Send to ITP, is available for this workflow. When the automation criteria are met, Content sends the filed document directly to the ITP transcript queue for processing. Review your transcript filing workflows and configure automation criteria that identify the transcript documents you want routed to ITP.
Notes: Once enabled, users no longer need to manually upload transcripts into ITP.

22. Enhancement: Intelligent Transcript Processing Extraction Accuracy Improvements

Who it affects: ITP administrators and transcript processing staff
Admin action required: No
What admins should do: Inform transcript processing staff of two accuracy improvements: multi-word course subjects such as “Poli Sci” are now extracted correctly as a single field value, and course data in multi-column transcript layouts is now more accurately associated with the correct academic term when courses continue across columns.
Notes: Teams that built manual correction habits around these two failure patterns should be told they can reduce that review effort, but verify against your own transcript formats before changing your QA process.

23. Enhancement: ITP Export to SIS Reliability for Large Transcripts

Who it affects: ITP administrators exporting transcripts to the SIS
Admin action required: No
What admins should do: Be aware that payload handling has been improved to reduce intermittent “Connect service unavailable” errors during transcript export. Previously the likelihood of failure increased with the number of courses on a transcript.
Notes: Monitor export success rates for high-course-count transcripts and report any remaining failures to Softdocs Support.

Etrieve Content User Experience Enhancements:

- Rich text editor now available in Form Builder, with inline accessibility checker
- Spacer element, maximum character length on text areas, and horizontal checkbox/radio layouts in Form Builder
- Search added to the Saved Sections list in Form Builder
- Form Group Administration migrated to a table-based UI in Central Administration
- Filtered and selected counts now display in Content Search Results, Unfiled Inbox, and Recycle Bin
- Paper plane icon replaces the right arrow for User Directed Routing
- Preview and Forms buttons in Form Builder can be opened in a new tab
- Cancel option added to the “Start from Draft?” dialog
- Shared inbox filing supported in the Outlook Add-In
- Intelligent Document Processing supports any document type

Known Issues Resolved:

- Share Link and Document Retention emails not sending
- Degraded functionality across feature flag-dependent features
- Password reset email not sending for STS login clients
- Sending final document to Content closed the document list too quickly, preventing “Go to Document”
- “Go to Document” not working when only one document exists
- Adding documents to a completed batch not working in Web Capture
- Lookup values and long document type names cut off when filing a document
- Prevent Negative Value rule not enforced in numeric key fields
- Unsaved Changes warning when filing or deleting the last merged document in a batch
- Loading Documents indicator not displaying without clicking the form
- Number and Money key fields displaying zero on initial display
- Duplicate document types displayed when editing a batch with a default doc type
- Money key fields intermittently displaying NaN when extracted values included a dollar sign
- Send button enabled when an Area was selected with no Document Type
- Document updates with default Area and Doc Type not saved in Web Capture
- Extraction not occurring when default Area/Doc Type applied to a document in Web Capture Batch
- ITP document viewer not always displaying the document in Chrome and Edge
- ITP receiving “Connect service unavailable” error on large transcripts
- Document Extraction Failed error in Capture Apps with IDP
- Merging non-PDF files over 20 MB throwing OutOfMemoryException instead of a clear message
- Intelligence Settings page not working for ITP-only clients
- Connect Data Export incorrectly converting numeric strings to dates
- Lookup not saving on second upload when pre-populated
- Dynamic list Add Row / Delete Row buttons active on disabled and read-only sections
- Deleting fields on a workflow end step removing fields from the copied workflow
- Workflow filter in Completed status not returning expected results in Central Submissions
- Is Empty / Is Populated searches failing when combined with prompt selection
- Is / Is Not searches unavailable on Number, Decimal, and Money key fields
- Keypresses generating a new chip per keystroke in new advanced search
- All Automations not showing due to a single misconfigured Automation