

Administrator Launch Checklist

Spring Release 2026

Administration and Governance Controls

1. Update: Configuration Settings for Column and Package Details visibility in Central

Who it affects: Central administrators and end users

Admin action required: Optional

What admins should do: Review the new global settings page in Central (gear icon → "Global Settings") to configure which columns appear in the submissions table. Disable columns like Workflow Name or Step if they are not needed for your users.

Notes: This provides greater control over the user interface but requires admins to actively configure settings to match organizational needs.

2. New: Content End User Experience - Saved Search

Who it affects: Content end users

What admins should do: Train users on the new Saved Search and Prompt Searching features

Notes: Review overview videos: [Saved Searches Overview](#) and [Prompt Searching Overview](#).

3. Subscribe to [Softdocs Status Site](#)

Who it affects: Admins and system end users

Admin action required: Bookmark and subscribe action required

What admins should do: Leverage this site and subscription to stay up to date on the status of Etrieve via each region

4. Review all Spring Release Resources included in [Rolling Release Notes](#), Blog Post and Email

Administration and Governance Controls

5. Change: Improve Performance of New Submissions Table (server-side search, sort, and filter)

Who it affects: Central administrators and end users with large submission histories

Admin action required: No

What admins should do: Inform users that searching, sorting, and filtering in the new Central submissions table now runs server-side. The "Load All" option has been removed. Users with over 200,000 packages may experience slightly longer load times (4-5 seconds) when using all three filters at once.

Notes: Power users with very large data sets should be made aware of potential load time variance.

6. Change: Allow Refer and Return emails to be disabled

Who it affects: Central administrators managing workflow notifications

Admin action required: Optional

What admins should do: Review workflow step notification settings. Administrators can now disable Refer, Refer Response, and Return email notifications on the Notify tab when these notifications need to be suppressed.

Notes: Provides greater control over email notification behavior in workflows.

Access, Security and Compliance

7. Change: IP Address now captured in History, Input History, and Printed Package History

Who it affects: All Central users; primarily relevant for audit and compliance teams

Admin action required: No

What admins should do: Understand that IP addresses are now captured for package decisions and input data entry. Review audit history pages to see this new information.

Notes: Enhances audit trail capabilities; no configuration required.

8. Change: Enhanced logging for user import troubleshooting in Etrieve Security

Who it affects: Security administrators managing user imports

Admin action required: No

What admins should do: Use the enhanced error logs (batch number, file name, row number, specific error details) to troubleshoot user import files more effectively.

Notes: Improved error identification including duplicate emails, invalid formats, and missing fields.

9. Change: User import processor no longer fails entire batch on bad line

Who it affects: Security administrators managing user imports

Admin action required: No

What admins should do: Review error logs for any bad lines; the processor will continue with remaining entries rather than failing the entire batch.

Notes: Reduces disruption from single bad entries in import files.

Access, Security and Compliance

10. Change: Department Administrators can now use unassigned/system templates

Who it affects: Central departments administrators

Admin action required: No

What admins should do: Inform department administrators that they can now use unassigned/system custom email templates in workflows without full email template administration rights.

Notes: Expands department admin capabilities.

11. Change: Return/decline comments now available to email template keys

Who it affects: Central administrators managing email templates

Admin action required: No

What admins should do: Admins should review any custom email templates that use comment keys, as these will now include comments captured during the decline and return process.

Notes: Provides additional flexibility for email notifications.

Access, Security and Compliance

12. Change: Frontegg ID mismatch user syncing improvements (Authentication errors)

Who it affects: Security / IAM admins troubleshooting authentication issues

Admin action required: Confirm impact

What admins should do: Confirm if any existing troubleshooting guidance or support playbooks should be updated; this reduces ID mismatch errors between IAM and Security.

Notes: Primarily operational/support impact; likely no configuration changes.

13. Allow Lookup to be selected on upload

Who it affects: Content administrators and end users uploading documents

Admin action required: Confirm impact

What admins should do: Confirm whether any guidance/training is needed now that upload can optionally include selecting the Lookup at upload-time (instead of only relying on post-upload filing/lookup assignment patterns).

Notes: May change user workflows and expectations during filing.

14. Add Document Type to the Columns modal (Content search table)

Who it affects: Content end users and admins configuring/searching content

Admin action required: No

What admins should do: Let users know they can add “Document Type” as a visible column in search results via the Columns modal.

Notes: Improves visibility; no configuration required.

Insights, Reporting and Visibility

15. Change: Enhanced Content Import metadata display

Who it affects: Content administrators managing imports

Admin action required: No

What admins should do: Users with "Download Control File" permission can now download control files directly from the Control Files section and view additional metadata.

Notes: Improves visibility into import configurations.

16. Change: Content Auditing enhancements with complete actionable details

Who it affects: Content administrators reviewing audit logs

Admin action required: No

What admins should do: Be aware that Content Auditing now logs complete details for Document Types, Areas, Fields, and Lookup Types including names, IDs, and actions (create, update, delete, associate, disassociate).

Notes / risks: Restores critical audit information that admins rely on to understand configuration changes.

17. Change: Focus Mode enhancements in New Central

Who it affects: Administrators using embedded forms or form originator links with focus mode

Admin action required: Optional - review existing implementations

What admins should do: If using focusMode or focus URL parameters, be aware that these now hide sub-navigation for Submissions and Forms, plus all header navigation to align with legacy behavior. Use hideformsList parameter if you want to suppress only the forms list. Review the [Form Originator Links Quick Start Guide](#) for details.

Notes: Changes focus mode behavior; may affect embedded form experiences.

Automation, AI and Integrations

18. Change: Content API - POST Endpoint for Lookups

Who it affects: Developers and integrations using the Content API

Admin action required: Optional - review integration behavior

What admins should do: Review existing API integrations. The API will now automatically create or update lookups as needed instead of routing documents to unfiled when lookups don't exist.

Notes: Changes API behavior for lookup handling; may affect existing integration logic.

19. Change: Do Not Queue Lookup Automation During Lookup Import Unless Lookup is Modified

Who it affects: Content administrators using lookup automation and lookup imports

Admin action required: Confirm impact

What admins should do: Confirm whether any existing automation workflows depend on lookup import events firing for unchanged lookups. The system will now skip queueing automation for lookups that have not changed, which may affect any workflows that previously relied on those events triggering unconditionally.

Notes: Intended to improve performance; verify no automation logic depends on unchanged-lookup events.

20. Change: Integration sources can now be used multiple times in the same form

Who it affects: Form builders and administrators creating forms with integrations

Admin action required: No

What admins should do: Inform form builders that integration sources can now be reused multiple times on the same form (e.g., multiple employee search dropdowns). Sources can also be duplicated as needed.

Notes: Expands form building capabilities for common use cases like repeated dropdown searches.

Etrieve Content User Experience Enhancements:

- Column customizations preserved when sharing Content searches
- Area/Doc Type upload dropdowns updated to auto-completes in Content
- Multi-column sorting now available in Content search results
- Enhanced Content Search Experience with [Saved Search](#) and [Prompt Searching](#) capabilities

Known Issues Resolved:

- Ordered/unordered lists broken in Email Templates
- Intermittent 403 Access Denied when opening form attachment elements
- Classic Forms lifecycle callbacks executing multiple times
- Department Manager unable to copy Import Configuration
- Department Manager cannot save name definition with Optional Group
- Saving changes after executing saved prompt search overrides prompt
- Package History cut off between 1200-1350px width
- Masked Inputs in Form Builder - Screen Reader adjustments
- Date fields not sorting correctly in Content search
- Logic causing inputs to lose focus while typing in Central
- Doc Types showing in Capture Apps dropdown for filing with no "Add" permission
- Web Capture and Outlook Plugin merged docs cannot be filed with IDP off