eFileCabinet → rubex Pre-Migration Steps

eFileCabinet Online

- [ ] **Make sure all files are checked in.**

  Complete en masse by going to the upper left three lined menu, Admin tab, Files, and File Sessions. Press CTRL+A to select the entire list of files, then select Force Check In.

- [ ] **Clear all items awaiting retention on the Manage Retention pane.**

  This is done by going to the upper left three lined menu, Admin tab, Files, and Manage Retention. Press CTRL+A to select the entire list of files, then select Perform Retention Actions.

- [ ] **Complete all Workflow instances.**

  This is done by going to the upper left three lined menu, Workflows. Select each In Progress instance and complete it (or delete instances you don't intend to complete).

- [ ] **Purge or restore Recycle Bin items (recommended).**

  Complete en masse by going to the upper left three lined menu, Admin tab, Files, and Recycle Bin. (You may restore any individual items you'd like to remain in the account by selecting those items, then selecting Restore Selected Items. To purge all remaining items, press CTRL+A to select the entire list of files, then select Purge Selected Items.)

- [ ] **Verify failed file uploads.**

  Select the up arrow/upload icon in the upper right hand corner, then select Incomplete Uploads.

  If needed files are listed, click the up arrow icon to the right of the file to open your local computer directory and navigate to the file for reupload.

  If you no longer have the file to reupload, or simply don't need to upload the file, click the X to the right of the file to remove it from the Incomplete Uploads queue.

- [ ] **Verify that all users have valid email addresses.**

  This is done by going to the upper left three lined menu, Admin tab, Users and Groups, and Users. Verify that all users listed have valid email addresses.

- [ ] **Log in to the SecureDrawer integration in eFileCabinet Online to migrate SecureDrawer information**

  This is done by going to the upper left three lined menu, SecureDrawer tab. If you are already logged in, no additional work is needed. If you are not logged in, select Login and enter your SecureDrawer credentials, then select Login.

- [ ] **Have all users log out of SideKick.**

  This is done in Sidekick by selecting the Settings tab in the bottom left corner, then selecting Sign Out.

eFileCabinet Desktop

- [ ] **Make sure all files are checked in.**

  Complete en masse by going to the Administration tab, File Sessions. Select the top item, then hold down SHIFT and select the last item in the list to select all files, then select Release.

- [ ] **Clear all items awaiting retention on the Manage Retention pane.**

  This is done by going to the Administration tab, Manage Retention. CTRL+Click all items in the list with the same suggested action type, then click Next and proceed through the retention steps. Repeat with any items with other suggested action types. (You may also SHIFT+Click the whole list to perform the same action on all items if you wish.) Repeat this process for every cabinet until all are cleared.

- [ ] **Complete all Workflow instances.**

  This is done by going to the Home tab, and selecting Automated Workflows in the upper lefthand pane. Select each In Progress instance and complete it (or delete instances you don't intend to complete).

- [ ] **Purge or restore all items in Deleted Items on each cabinet (recommended).**

  Right click a cabinet and select Deleted Items. CTRL+Click items you wish to restore, then select Restore. CTRL+Click any items you no longer need and select Purge (Shred). Enter your password where prompted, then select Confirm Purge. Once back in the Deleted Items window, check "Show Subdirectories" and repeat this process. Once all items are deleted from this first cabinet, repeat this process on each remaining cabinet.

- [ ] **Verify that all users have valid email addresses.**

  This is done by going to the Administration tab, Manage Users. Select a user, then select Edit, and make sure that a valid email address is listed under Email in the User Info area. Repeat this process for all users.

- [ ] **Have all users log out of SideKick.**

  This is done in Sidekick by selecting the Settings tab in the bottom left corner, then selecting Sign Out.

- [ ] **If you would like SecureDrawer information to be migrated, reach out to your account manager following your desktop migration.**

  They will acquire information from you to enable the SecureDrawer migration process following the completion of your desktop to Rubex migration.