

# rubex Quick Start Guide

## FIRST TIME LOGIN

### HOW TO DO IT, WHAT TO EXPECT

A Customer Success Manager will contact you to schedule your kickoff call to discuss goals and training.

Once your Rubex system is implemented, to login for the first time go to the Sign-In page <http://account.efilecabinet.net/>

As the main account holder and admin, you'll receive an email from eFileCabinet with your Username (likely your email address) and a temporary password that you'll be prompted to change as soon as you log in for the first time.

## UPDATE PASSWORD

There are two methods for updating your password.

- In the Sign-in screen, clicking "Forgot Password?" will start the process of resetting your password either through an email or text message authentication.
- When logged into Rubex, within User Settings you can immediately change your password.

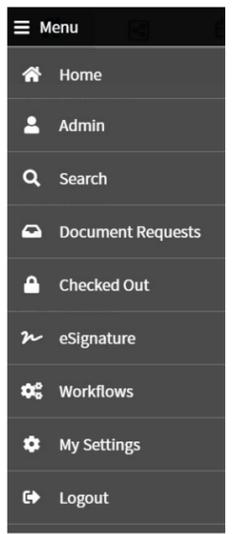
*Note: As an Administrator, you can set security policies that require password complexity and how frequently it needs to be updated.*

## MAIN MENU

The Main Menu, represented by a hamburger icon, allows you to navigate eFileCabinet Online.

The Main Menu options include:

Home, Admin, Search, Document Requests, Checked Out, Workflows, My Settings, eSignature, Logout.



## TOP MENU OPTIONS

<p><b>NEW</b> Add new cabinets, drawers, folders, and files.</p>		<p><b>NEED HELP?</b> Ask a question and access other help options.</p>	
<p><b>SHARE</b> Share selected files and folders, request documents and eSignatures.</p>		<p><b>DOWNLOAD AND INSTALL DESKTOP APPLICATION</b></p>	
<p><b>EDIT</b> Cut, copy, paste, rename, or delete a drawer, folder or file.</p>		<p><b>MORE</b> Apply templates, mass apply templates or create a workflow instance.</p>	
<p><b>MORE</b> Apply templates, mass apply templates or create a workflow instance.</p>		<p><b>SEARCH</b> Access advanced search.</p>	
<p><b>SEARCH</b> Access advanced search.</p>		<p><b>ACCESS SUPPORT OPTIONS</b></p>	
		<p><b>ACTIVITY CENTER</b> View upload and download statuses. View current tasks and alerts. View recent documents.</p>	

## DETAILS MENU

	<p><b>GOVERNANCE</b> Retention settings can be added to a Cabinet, Drawer, Folder, or File. Retention settings allow you to retain items for a set period of time and determine what happens after.</p>		<p><b>PREVIEW</b> View compatible documents and perform various actions on a file in the Preview pane.</p>
	<p><b>AUTOMATION</b> Automation rules trigger actions when certain conditions are met. These include notifications and triggering workflows when files are uploaded or downloaded.</p>		<p><b>PROFILE</b> View and edit a document or folder's profile metadata. Accurate profiles improve search results and workflow capabilities.</p>
	<p><b>FILE VERSIONS</b> View the versioning information of a file, including previous versions and comments, and set a previous version of a file as the current version.</p>		<p><b>COMMENTS</b> View and add comments to a document or folder. Comments are separate from annotations added to the document and only viewable on Rubex to users with read permission.</p>
	<p><b>AUDIT LOGS</b> View audit information for a selected item. Includes: Date and time, User, Category, Action, and Client Application. Download the log as a .csv to view more information.</p>		<p><b>PERMISSIONS</b> View the user and group permissions for a document or folder. Admins can directly edit permissions.</p>