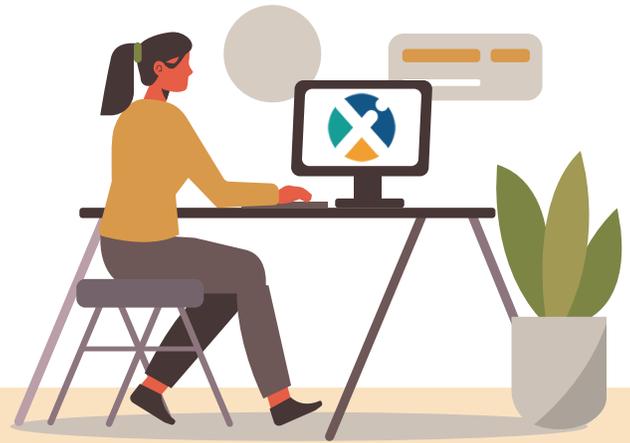


Prepare for Your Upcoming Rubex Migration



Exciting news! We will begin migrating eFileCabinet Desktop customers to our new on-premises version of Rubex over the next two weeks. Soon, your organization will be benefiting from this award-winning and feature-packed platform for document management, workflow and process automation.

We wanted to provide a couple of reminders, suggestions and tips to prepare in advance for a smooth, fast and trouble-free migration.

We recommend you keep these instructions handy until your migration is complete.

System requirements for on-premise Rubex

While many eFileCabinet customers are currently

running eFileCabinet Server on a system that will support the new on-premises version of Rubex, we strongly recommend double-checking system requirements before starting your migration to Rubex.

The table below provides an overview of Rubex Server and Client system requirements. Minimum and recommended server requirements outline the hardware and OS required to run the Rubex Server. Client system requirements outline the minimum hardware and OS required to run the Rubex Client software on users' computers.

	RUBEX SERVER SYSTEM REQUIREMENTS		CLIENT REQUIREMENTS
	<i>MINIMUM SERVER* SYSTEM REQUIREMENTS:</i>	<i>RECOMMENDED SERVER* SYSTEM REQUIREMENTS:</i>	<i>MINIMUM CLIENT SYSTEM REQUIREMENTS:</i>
Operating System	Windows 10 or newer (64-bit)	Windows Server 2016 or newer (64-bit)	Windows 7 or newer Mac OS Sierra (10.12)
Processor	Quad-core CPU	8-core CPU	Dual-core CPU
Memory	8 GB RAM	16 GB RAM or greater	4 GB RAM

The above indicated(*) server requirements are for a server that is dedicated to running Rubex Server. If other applications are running on the same server, system requirements will increase.

If you intend to use both the Server and Client modules of Rubex on the same end user computer at the same time, we recommend a minimum system requirements of Windows 10 running in 64-bit mode with an 4-core CPU and 16GB of RAM or greater.

If you connected eFileCabinet Server to Microsoft Active Directory services, Rubex Server requires Active Directory Federation Services (integration available Q4 2021).

Required hard disk space on the server depends on the amount of content being stored and the file size of stored images. The storage space required for the new on-premises version of Rubex is very similar to storage space requirements for the legacy eFileCabinet Desktop system.

Update eFileCabinet Desktop Software

In order to migrate to the new on-premises version of Rubex from eFileCabinet Desktop, your eFileCabinet Server software needs to be updated to at least version 18.2.507. You can check your version number and update to a current version by launching the eFileCabinet server module from the Windows System Tray on the PC or server running the software, and clicking "Update Now."

All managed files on a single Logical volume

The Desktop-to-Rubex migration tool requires all of the documents in eFileCabinet Desktop to be on one logical volume (basically, the same Windows drive). Simply copy data folder(s) from any drive to the main drive where you're consolidating all files, and then update the path to each folder in the relevant Cabinet in eFileCabinet Desktop.

If you actively use SecureDrawer to exchange files with others, you should copy those folders and files into your main drive as well.

Rubex system email configuration

Many powerful features in Rubex leverage email communications sent by the Rubex system (document requests, workflow tasks, etc.). As such, during installation, we recommend configuring Rubex with necessarily email configuration details so that Rubex can send out these system emails. During installation, you will be prompted to enter information about your SMTP email server address and your SMTP email server port.

Your SMTP email server address will typically look like one of the following:

smtp.companydomain.com

mail.companydomain.com

email.companydomain.com

Your SMTP email server port will be a number. Typically, it's "587" but might also be "25", "465", or similar.

Collect user emails for each Desktop user

Rubex utilizes email addresses as the primary login, so you will need to put in an email address for each legacy Desktop user during the installation and migration process so those users will be set up in Rubex. To accelerate migration, you can collect those email addresses in advance and have them handy when you start the installation and migration process.

How the migration process will start

We will begin migrating eFileCabinet Desktop customers to Rubex during the last two weeks of September. As the first step in the process, you will receive an email that indicates we are ready to migrate your account. This email will contain two vital pieces of information:

A server instance key

A server instance secret

This email will also include a link to detailed migration instructions and information on how to contact customer support Monday - Saturday if you have any questions.

Note: if you need to change the main email address used to provision your account, please contact your account executive and make this update prior to starting the migration process.

The next time you start the eFileCabinet server module after receiving these instructions, you will see a prompt to download and install Rubex, and begin the process of migrating your Desktop data into Rubex. You can start this migration whenever it is convenient for you and your organization.

Thank you again for choosing Rubex. We look forward to continuing to provide you and your organization with solutions that help you focus on the work that matters most.