

Rebrand

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Rebrand Roadmap - eFileCabinet to Revver

Please list the following:

- Software or service to transition
- Contractual period
- Partial transition steps
- Full transition steps
- Tests Needed
- Tests Completed

Large Hurdles

- Mobile phones
 - Outlook email and Calendar will not work the same
- Google to Office
 - Won't have a way to login to Chrome. From what I can tell if people want any sort of browser syncing.... they will have to use (cough) Edge. Firefox would have a solution for this probably. That might be the best alternative.
 - Outlook won't retain sub labels that exist in Google. May be an issue for some.
 - Comments in documents and spreadsheets might no transfer over
 - Excel on Macs might be weird
- Office 365
 - I don't think our F3 license will get us what we want. I think we will need business basics. Currently our F3 license limits us to 2GB of storage space. Business Basics gives everyone 1TB.
- Phone Migration
 - Teams Phones won't work with our current desk phones.
- Slack to Teams
 - Apps in use by Emily:
 - Datadog alerts
 - Uptime Monitor alerts
 - Change Management automation (Release pipeline messages, automated messaging related to change/reminders)
 - StatusPage notifications
 - Tier 3 form results
 - SOCNOC alerts (Emails from esentire, azure, etc)
 - Reminder for support about emails (per Curtis's request)

Google to Office 365

(Contract: Month to month on the 1st. 129 seats)

Partial transition steps

- Add aliases to all employees and groups

Full transition steps

- If staying with Google - Change Primary Domain - https://support.google.com/a/answer/7009324?hl=en&ref_topic=6302293
- Create new accounts in Azure AD. Create new groups.
- Export / Import Mail, Calendar, Docs

Tests/Tasks Needed

- Create aliases for all employees and groups
- Find out what to do with Google Meet hardware. Are we paying for this? Can we turn this into Teams hardware?
- Do we want to keep the same naming convention? My vote would be to go for first name only then first name last initial.
- Employees will no longer be able to sign into Chrome for syncing info. We need to find an alternative solution to this probably. Firefox?
- Try doing the export / import for everything

Tests/Tasks Completed

- Aliases have been setup for each employee and group. There were some groups that have already maxed out their number of aliases.
- Barracuda has partially been setup. Brian needs to add some info on his end.
- Looked into the Google Meet hardware. Basically a paperweight unless we are going to use it for Google Meet.

Azure AD - eFileCabinet to Revver

(Contract: NA)

Partial transition steps

- Setup users in secondary domain?

Full transition steps

- Change Primary Domain - <https://learn.microsoft.com/en-us/azure/active-directory/enterprise-users/domains-manage>

Tests/Tasks Needed

- Find out if you can change secondary domain to primary domain. Create a test users. Find out if licensing can transfer between domains.
- Find out if we can transfer users to different domains. Do we need to transfer documents?

Tests/Tasks Completed

- Test 1

Slack to Teams?

(Contract: 2022-08-23 - 2023-08-23)

Partial transition steps

- Have employees start using Teams while we still have Slack

Full transition steps

- Transition for find replacements for webhooks and apps that we are using in Slack

Tests/Tasks Needed

- Find out apps and webhooks that are in use and who uses them. Find out if there are Team alternatives.

Tests/Tasks Completed

- Test 1

Phone System - Jive to Zoom / Microsoft

(Contract: Month to Month)

Partial transition steps

- We could transition one team at a time but it probably makes more sense to do everything at once.

Full transition steps

- Full eval of Microsoft phone

- Rebuild everything from ground up

Tests/Tasks Needed

- Do demo with Microsoft
- Find ways to reduce toll free usage (already sent an email but didn't get an actual response)
- Test Yealink phones with Microsoft

Tests/Tasks Completed

- Did major research on Teams phones. I don't think it will work for us. To demo we need to go through the VAR. Reporting is not as good. Our desk phones would not work with Teams. I think it would end up costing us more than Zoom.

Zoom to Teams

(Contract: 2022-12-28 - 2023-12-28)

Partial transition steps

- Start using Teams concurrently with Zoom

Full transition steps

- No account creation necessary... just start using teams for calls and webinars

Tests/Tasks Needed

- Find out if Gong can be used with Teams. Any alternatives?
- Find out what Marketing needs specifically in webinars to see if we can duplicate that.
- Find out how recording works.
- Verify camera controls with the Near bars
- See if the Google Meet hardware can work with Teams

Tests/Tasks Completed

- Looks like Gong to Teams is possible: <https://integrations.gong.io/integrations/microsoft-teams>
- I have looked up our Google Meet hardware and it appears that we cannot use it for anything other than Google Meet.

Barracuda

(Contract: NA)

Partial transition steps

- Add secondary domain. See if Aliases auto-populate

Full transition steps

- Change primary domain to Revver

Tests/Tasks Needed

- Test aliases

Tests/Tasks Completed

- Barracuda has partially been setup. Brian needs to add some info on his end.
-

Smaller Tasks / Transitions

- Bookstack
 - Have everyone login with their new accounts. Reassign roles
- Zammad
 - Not sure... This might be tricky. Need to look into this more
- SnipeIT
 - Probably leave as is and add new domain. When checking out just check out to the new domain. Historical data should make sense showing the older domains.
- TalentLMS
 - Need to find out more info about changing users. This might be tricky.
- Salesforce
 - Discuss with Anna. Probably recreate integration. Ooohh boy. This should be fun.

Copy Paste Template

(Contract: 2023-XX - 2024-XX)

Partial transition steps

- Step 1

Full transition steps

- Step 1

Tests/Tasks Needed

- Test 1

Tests/Tasks Completed

- Test 1

Email Alias to new Revverdocs.com domain transition

Admin Changes

Steps to be done by an admin:

- Change domain in Google
- Change domain in Azure AD
- Change domain in Slack
- Change domain in TalentLMS
- Change Revver database for new domain
- Change username in Visual Studio (unverified)
- Change username in Gong
- Change username and email in Salesforce

End User Changes

Software and Services

Please read through EVERY software or service that you use to see what changes may need to be made before it will fully work.

Computer Login

- Mac
 - You will login the same as you always do.
 - When you are logged into your computer, you should open "Company Portal" and login with your revverdocs.com email address and password.
- Windows
 - Your PIN will still work to log you in.
 - To login with a password, it will say "incorrect password" UNLESS you select "Other User" and type in your email (with the revverdocs.com domain) and password. This will log you into your existing account and will NOT create a new

one.

Chili Piper

1. User Instructions

1. Login with Salesforce
2. Click your name in the bottom left hand corner
3. Confirm your email has automatically changed (top left corner)

Docusign

1. User Instructions

1. Click Reset Password if you do not remember your password
1. You'll be prompted to login again and enter a verification code
 1. Go to <https://account.docusign.com/>
 2. Login (username will be your old Salesforce username: i.e. amaruji@efilecabinet.com)
 3. Click your initials in the top right hand corner
 4. Click "Manage Profile"
 5. Click "Update" next to Email Address
 6. View popup (NOTE: we have tested already-sent envelopes and seen zero issue with them); click "Continue"
 7. Enter your new email address (i.e. amaruij@revverdocs.com)
 8. Confirm code

Gong

- Anna → will change your primary email address and also add your old efilecabinet.com email as an alias so that Gong retains your activity in the past and going forward

Google

- Google will automatically recognize your domain change. You will not need to do anything.
- When you need to login to Google you will now use your @revverdocs.com email and the password is the same. You will no longer be able to login with your

@efilecabinet.com

- Google will automatically create an alias for your @efilecabinet.com email address so you will continue to receive emails going to that address.

Goto / Jive

- You will use the same username and password you have always been using.

Lastpass

- Once your email address changes, LastPass will send you an email stating that your email address has changed. It asks you to login to LastPass. I don't know if that is necessary for most employees though. Employees who use a master password will have to do this.

Microsoft / Azure AD / Office

- Things will stay logged into your old account for a while and may work for a time. You will need to log out and log back in with the revverdocs.com domain.

Outlook

- Outlook will not work until you migrate or add a new account. I did not have any luck migrating an account but I was able to create a separate account using Google Sync.
- Overall the process for Outlook is not great and you should plan on this taking 15-30 minutes depending on how much data you need to download.

Outreach

1. No action is necessary and while your mailbox will show as still being efilecabinet.com, your emails will be sent from revverdocs.com; however, the following is recommended to keep usernames consistent:
 1. Login
 2. Click your initials in the bottom left hand corner
 3. Click "Personal Settings"
 4. Click "Email & password"
 5. Click "Change email address" button

6. Follow remaining instructions

Phone Apps

- Gmail
 - Your phone at some point will say there is an issue with your login. You will need to change your email or you may need to remove your efilecabinet.com account and add your revverdocs.com account.
- Microsoft Authenticator
 - On your authenticator app you will need to add a new profile with your Revverdocs.com email. If you get conflicts you may also need to remove your efilecabinet.com profile.
- Slack
 - If you use Slack on your phone it will ask you to change your details and login again.

Salesforce

1. Anna → will change user's email and username
2. User Instructions:
 1. User receives email asking them to confirm email change; follows link
 2. User logs in with Azure
 1. NOTE IN YOUR LASTPASS: your username has changed. While most users log in with Azure, it's still important to keep your username & password up-to-date in LastPass
 1. **For example: if your username was previously**
amaruji@efilecabinet.com, it is now
amaruji@revverdocs.com

Slack

- An admin will need to change your email address in Slack.
- After the change is made, everything will continue to work. You will get an email that your email address has changed.
- When your Slack login token expires and you need to log back into Slack, you will now do so with your revverdocs.com email address.

TalentLMS (Training)

- The domain has to be changed in your account before you can login.
 - (Note for admins who have passwords for this account: If you need to login via email you can use <https://efctraining.talentlms.com/login>)

Visual Studio

- Visual Studio will not recognize your license with your new domain until an admin changes your username in Visual Studio.

Zoom

- When you login to Zoom, Zoom will recognize that you have changed your email address and ask if you want to change it in the account. Confirm that you do.

Zoominfo

1. Login unaffected; however, emailed lists could be impacted
 1. Reach out to Anna in #salesforce_support if you'd like to change your ZI email address

Additional Notes:

- Google would not allow me to sent outgoing emails. I got the error "The "From" address is invalid. Please choose a valid one." After I restarted my browser everything worked fine. - This will not happen for everyone.
- Microsoft authenticator app may require you to type in your password again. Make sure you have SMS authentication as an option or make sure that you know what your password is.

Changing your login domain from efilecabinet.com to revverdocs.com

Switching to revverdocs.com

If you are still logging into Google or Microsoft using your efilecabinet.com domain, IT will change this shortly.

Things to know

The changes required so you can login with your revverdocs.com domain are fairly simple and low impact. This will not change your account and no data will be lost. We have tested many different sites and services; to see everything tested with notes, please check out [this page](#). Currently, Outlook is the main service that requires some amount of additional effort by the end user to switch over.

Logins that IT will change

- Google
- Microsoft
- Slack
- TalentLMS (training.revverdocs.com)

What you need to do

Once IT has changed your domain from efilecabinet.com to revverdocs.com you don't really need to do anything. You will not be logged out of any services automatically. The main thing for you is to be aware that after the change has been made, the next time you log into Microsoft or Google you will now need to use your username @ revverdocs.com. Your password will remain the same.

Changing your username in Revver

It is recommended that you change your username in Revver to make sure logging in is smooth if you use Google or Azure AD to login. To make this change, login to <https://app.revverdocs.com/> > Click on the drop down in the upper right hand corner then go to My Settings > Change your email address in the "Username" field > Click Update in the bottom right corner.

If you are unable to make these changes or would like help doing this, please submit a ticket to ithelp@revverdocs.com

Verifying other software you use

It is possible that you use another service that needs to be changed. If you have any questions for specific logins, please refer [to this page](#). If you have questions with software not listed here you can submit a ticket to IT.

Changing the URLs for Slack, Zoom, and TalentLMS (from efilecabinet to revver)

Slack

We will change Slack's URL from **efilecabinet.slack.com** to **revver.slack.com**. This will not have any impact for most employees. You will remain logged into Slack. When your login session expires and you need to login again, you will continue to be able to login by clicking on the "Sign in with Google" button. If you have created an app for Slack you may need to reconfigure it to reflect the new changes.

[Click here to read information from Slack's help article.](#)

Here is the important information you should know from this article:

- "When you change your workspace URL, the former URL will become available for use by another group. Slack will automatically redirect the old address to the new one as long as no new groups claim the URL."
- "Any members already signed in when SSO is enabled will remain signed in. Going forward, all members will sign in to Slack with their IDP account. If you chose to require SSO, your members will see a sign in page before they can access your workspace."

Zoom

We will change Zoom's URL from **efilecabinet.zoom.us** to **revver.zoom.us**. Once the changes are made, old Zoom URLs will redirect to the new URLs. You should change your personal meeting URLs and Webinar URLs and soon as possible after the change to avoid confusion. If you have Zoom apps or plugins you may need to sign into those again after the change.

[Click here to read information from Zoom's help article.](#)

TalentLMS

We will change our Training website (TalentLMS) from **training.efilecabinet.com** to **training.revverdocs.com**. You will not need to make any changes on your end for how you will log in.

How to add a Revver Email Signature (Template)

There are two methods for adding an email signature. Method 1 is a bit more involved but is more reliable. Method two is easierish but is very inconsistent and may not work.

Method 1

- Download the attachment below
 - [RevverSignatureTemplate.html](#)
- Click on the downloaded file. It should automatically open in your browser.
- Highlight the template and copy (right click copy or Ctrl+c)
- Skip to the "Gmail Steps" section

Method 2

- Click on this link to find [the original template in Google Docs](#)
- Make a copy of the document. Change the text and photo in the document to be your personal information
- (Optional step if step below does not work) Highlight the template then right click and select "View more actions" then "clear formatting"
- Highlight the template and copy (right click copy or Ctrl+c)
- Skip to the "Gmail Steps" section

Gmail Steps

- In Gmail click on the gear icon in the top right corner
- Select "See all settings"
- Scroll down to the signature setting
- Press "Create new" and give your signature a name like "Revver Default Signature"
- In the box on the right paste your template
- If you need to make any changes to the text or photo of the template do that now.
 - You will likely need to change your profile image size to "small"
- Change your Signature Defaults according to your preferences
- Scroll to the bottom of the page and click "Save"

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