

# rubex

## Quick Start Guide

### Key Features

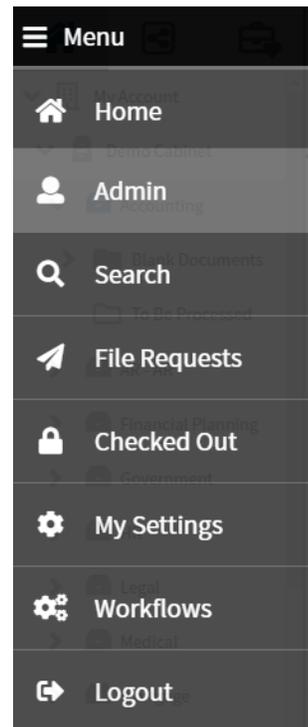
Rubex combines all of the document management features of eFileCabinet, the secure-sharing portal of SecureDrawer, and the power of document-process automation of Workflow in one tool.

#### Basic Navigation

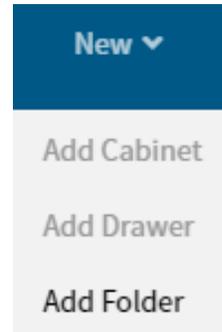
The Menu Bar options include: Main Menu, New, Share, Edit, More, Search, Help, and Activity Center. For all Menu Bar menus, available options will be shown in black while unavailable options will be grayed out.

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

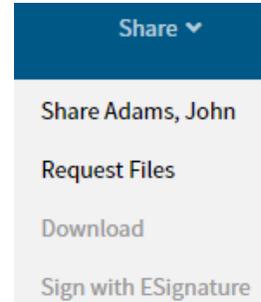
The Main Menu options include: Home, Admin, Search, File Requests, Checked Out, My Settings, Workflows, and Log Out.



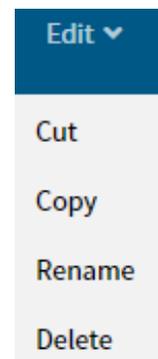
The New Menu allows you to add Cabinets, Drawers, and Folders.



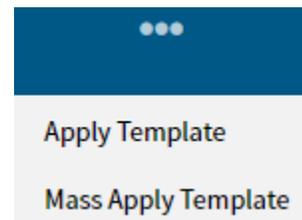
The Share Menu allows you to Share a cabinet, drawer, folder, or file with another person as well as Request Files, Download, or digitally sign documents with DocuSign, ShareFile, or RightSignature.



The Edit Menu allows you to Cut, Copy, Rename, or Delete a Cabinet, Drawer, Folder, or File.



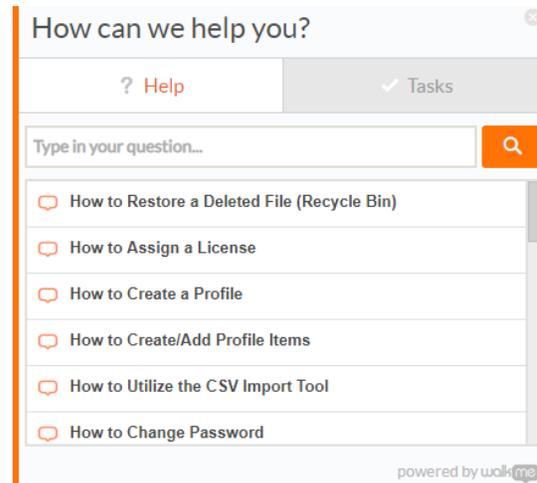
The More Menu, represented by an ellipsis icon, allows you to Apply a Template to a Drawer or Folder as well as to Mass Apply a Template to a Cabinet or Drawer.



The Need Help button will open a window showing a list of interactive, step-by-step onscreen instructions for many common tasks. Under the Help tab, you can enter your question to find an appropriate tutorial or scroll manually to find your topic.



The Tasks tab will give you the chance to try out the things you have learned from the tutorials to help you master Rubex.

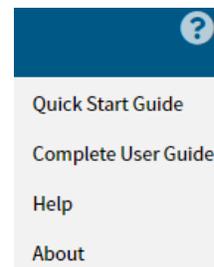


The Search box allows you to Search for the name of a Cabinet, Drawer, Folder, or File, or information in Profile Items.

The gear icon will open Advanced Search.



The Help Menu, represented by a question mark, gives you access to various Help options. If you click on the Help in the menu, you will be taken to the eFileCabinet Support website.



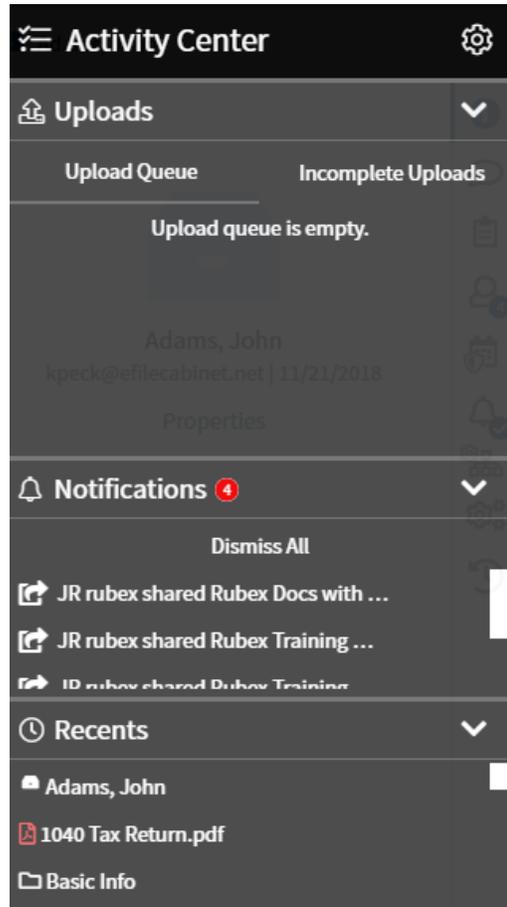
The Activity Center, represented by a task list, allows you to view the Upload Queue, which is a list of any Files that have been recently Uploaded to Rubex, and any Incomplete Uploads, which is a list of Files currently in the Upload process or Files that failed to Upload properly.



It displays your personal Notifications, which may include notices of:

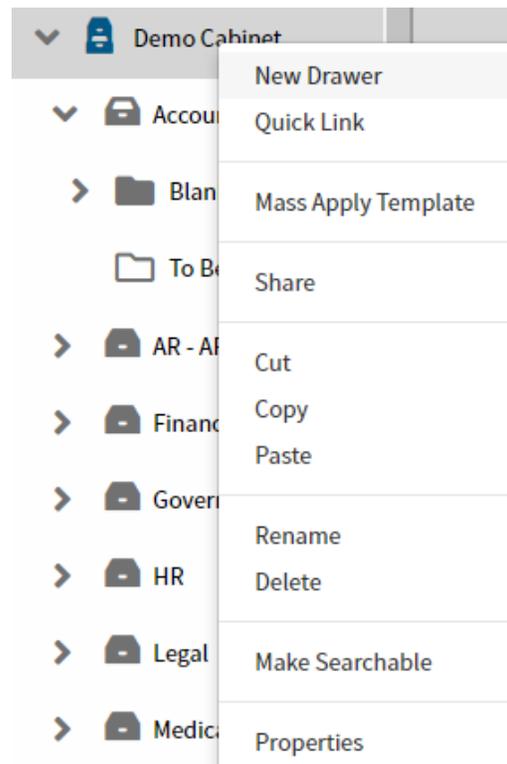
- Something has been shared with you with any messages that were attached
- An item is approaching its Governance date and will have an action applied
- Workflow assignment

It additionally shows a list of your Recents, which can be cabinets, drawers, folders, or files. Clicking on any of these items will automatically navigate you to that location.

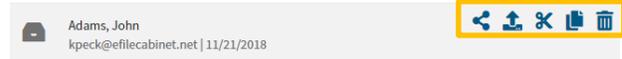


There are several operations that are accessible by right clicking on an item's name, either from the Cabinet or Tree View in the left pane or from the Contents View in the center pane. The menu will change based on what operations can be used on that type of item.

Some of these operations include: New Drawer (or Cabinet or Folder), Upload, Quick Link, Add to Portfolio, Remove from Portfolio, Apply Template, Mass Apply Template, Share, Check Out, Check In, Sign with eSignature, Request Files, Cut, Copy, Paste, Rename, Delete, Start Workflow, Make Searchable, Properties.



In addition, there are several options when hovering over the name line of a Cabinet, Drawer, Folder, or File, including: Share, Upload, Cut, Copy, and Delete.



In Rubex, when an Account, Cabinet, Drawer, Folder, or File is selected, the Details Menu (the right pane) allows you to perform various actions, including: Details and Preview, Comments, Profile, Permissions, Governance, Automation, File Password, File Versions, and Audit Logs.

Details and Preview on the Details Menu is represented by the letter i in a circle and an eye. The Details icon shows you information about the Account, Cabinet, Drawer, or Folder that you have selected.



The Preview icon will appear when you select a file. Preview allows you to perform various actions on a File in the Preview pane.

Comments on the Details Menu is represented by a conversation bubble. Comments allows you to view, add, or edit comments for an Account, Cabinet, Drawer, Folder, or File.



Profile on the Details Menu is represented by a clipboard. A Profile can be added to an Account, Cabinet, Drawer, Folder, or File. Creating a Profile for items in Rubex increases your ability to find those items in a search because a Profile adds searchable metadata to the selected Cabinet, Drawer, Folder, or File.



*Note: If you add a profile to a drawer, everything in that drawer will automatically inherit the profile and the entered metadata.*

Permissions on the Details Menu is represented by a person icon. Permissions can be added to an Account, Cabinet, Drawer, Folder, or File. Adding Permissions allows other users and groups to View, Edit, Delete, or Administer.



The little number bubble shows the number of users that have access to the specific item.

Governance on the Details Menu is represented by a shield on a calendar. Governance settings can be added to an Account, Cabinet, Drawer, Folder, or File. Adding these settings for items in Rubex allows you to protect and retain the items for as long as necessary. Additionally, you can choose what should happen to those items at the end of its expiration.



Automation on the Details Menu is represented by a bell, a gear with a chart, and gears, depending on the type of item you have selected.

The bell represents automatic notifications you can receive when something happens in the place it is set on. You can choose to be emailed or to receive a notification in the Activity Center.



The gear with the chart represents auto applying templates. If this is set up on a drawer, any new folder that is created will automatically have the template applied.



The gears represent beginning a Workflow automatically when a new folder or file is added.

File Password on the Details Menu is represented by a key. File Password allows you to set a password to make the contents of a file even more secure. The Previewer will not show the file if a password is set, and the password is required in order to download or check out the file.



Versions on the Details Menu is represented by two papers. Versions allows you to view the Versions information of a File, to upload a new Version of a File, and to set a previous Version of a File as the current Version.



Audit Logs on the Details Menu is represented by a clock with a circle arrow. Audit Logs allows you to view information for a selected Account, Cabinet, Drawer, Folder, or File, which includes: Date and time, User, Category, Action, IP Address, and any system Notes.

