

## Migrating to Revver™ Web-based Application

# Frequently Asked Questions

### **Why should I migrate to the Revver™ Web-based Application?**

Migrating to the new web-based application provides several benefits over the current desktop application. Here's a summary of the key improvements:

- Browser-based access. You can manage documents from anywhere you have internet service.
- eSignature features. You can send unsigned documents and receive signed documents.
- Searchable text. All document content is search friendly, so you can quickly find your documents.
- Custom workflows. You can create a process to approve documents and collect information.
- Unlimited guest users. You can set up guest user accounts to allow secure and limited access to documents.

### **Where can I learn more about the Revver™ Web-based Application?**

If you still want to know more, watch the introduction video on this landing page to learn how the Revver™ Web-based Application works for Caselle users. [www.caselle.com/revver\\_migration](http://www.caselle.com/revver_migration)

If you have questions about how to use Revver™ Web-based Application, contact Revver™ directly at [support.revverdocs.com](http://support.revverdocs.com) or call (801) 374-5505.

### **What should I expect when I start the migration process?**

Migrating to the new web-based application is a straightforward process. You will be assisted by a migration specialist who will use a migration tool to transfer of all your documents and settings to Revver™.

Here's an in-depth look at what you can expect.

#### **1. Submit a form to provide your contact information.**

By submitting this form, you will let us know that you are ready to begin the migration process. It is a quick form that simply asks for your contact information. [caselle.com/revver\\_migration](http://caselle.com/revver_migration)

#### **2. Premigration call with a migration specialist.**

Allow about thirty minutes. We'll confirm your settings and configuration, verify your server version, and give you an estimated time to complete the migration process. Your server

administrator will need to attend this call, too.

**3. Complete any necessary work identified in the premigration call.**

During the call with the migration specialist, you may be asked to complete some tasks before it's time to move the files to the new application. For example, you may be asked to update the Document Management server to the latest version. It's important to complete the requested tasks before the migration appointment to make the process run smoothly.

**4. Receive access to your new Revver™ account.**

We will create your Revver™ account and add your software administrator as the first user.

**5. Migrate files to the new application.**

The time required to migrate files will depend on completing the tasks you have been asked to complete and the database size. Most organizations will be able to finish this step in a few hours. During this time, users should be logged out of the Document Management application. You may also want to stop the Document Management service to make sure documents are not being accessed or viewed while files are moving to the new application.

**6. Map files to the new account.**

This step requires approximately thirty minutes. The migration specialist will use the configuration file from the old application to map the files that have been moved to the new application. This step means you and the Connect applications that reference documents will be able to find the files in the new application. The migration specialist will verify everything is working as expected.

**Note:** If the database is large, the migration specialist may choose to schedule a follow-up call to complete this step.

**How do I start the migration process?**

When you're ready to begin migrating to the Revver™ Web-based Application, go to [www.caselle.com/revver\\_migration](http://www.caselle.com/revver_migration) to sign up. After filling out the form, a migration specialist will contact you to start the process.

**What happens if I don't migrate before January 1, 2025?**

If you choose not to migrate to the Revver™ Web-based Application, you can continue using the old Document Management desktop application and you will be billed the new monthly licensing fee of \$100 per license. (It's possible that your organization already pays \$100 per license. Please reach out if you have any pricing-related questions.) Revver™ support for the Document Management desktop application will end December 31, 2024.