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DocumentChecker – Migrating from v1 to v2 Q&A

Contents

Introduction

If you are a customer or user of today's Keesing DocumentChecker v1 online service this document explains how to plan your move to Keesing's new v2 SaaS service.

Today's v1 service will discontinue by 30 June 2023. If you have a valid subscription beyond that date then you must migrate to the new v2 platform before that date, at a time of your choosing.

This document focuses on your role with DocumentChecker to help you understand the changes and what to do next.

You do <u>not</u> need to read this document if:

- Your subscription to DocumentChecker expires before the end of June 2023 and you do not plan to renew it. If this is the case then you can stay with DocumentChecker v1.0 until your subscription expires.
- You are new to Keesing DocumentChecker in 2023 and have no access to the v1 service.
- You are using an <u>offline</u> version of the DocumentChecker product.

Are you a User or Administrator of DocumentChecker v1?

The first thing to understand is your connection with today's v1 service.

In smaller organisations one person may fill several, even all of these roles.

Role	What you do	How you connect
User	Uses the DocumentChecker UI and data to check ID or banknote documents	Logs in with Username/password provided by SuperUser <u>or</u> May have direct access based on a direct integration by your organization
SuperUser	Responsible for user administration in your organisation. Can add and delete users within your organization's DocumentChecker account.	Receives Username/password from Keesing. SuperUser has special access to manage users within the Keesing service.

Role	What you do	How you connect
SuperUser	Is most often also a User.	
IT Administrator	Only involved to assist if your organisation makes use of the IP address authentication method.	IT admin may have direct contact with Keesing Technical Helpdesk or may do this via SuperUser.
Financial administrator	The person in your organisation responsible for financial administration of your subscription account.	Connected with Keesing Customer Services.

Questions & Answers

Based on your role here are some of the most important questions and answers.

Users

Is the new v2 service found on the same web URL?

No, the new v2 service has a new URL and should not be confused with the current v1 service.

The URL for the new v2 service is: https://app.documentchecker.com

The URL for the v1 service is: https://www.documentchecker.com

Can I use the same username/password for both v1 and v2 service access?

The v1 and v2 platforms are not connected and they work differently with user IDs. You will be invited to create a new password in the v2 service. This invitation will be sent to your email address which will also be your new username. Your choice of password is up to you. All passwords are stored encrypted and Keesing cannot read them.

If your organisation decides in future to use SSO to access DocumentChecker then you will be able to use your organisation identity and authentication method. Again, this will not be the same as your Keesing identity.

Can I as a User move directly to the new v2 service?

No. Your v1 username and password credentials will not work with the new v2 platform.

There are three possible routes for you.

1. You need to be invited by your organisation SuperUser, who is invited directly by Keesing. Your SuperUser will send you an invitation to 'onboard' to the v2 platform based on your email address. You will then choose your own password to authenticate. You can use both of these to logon directly to the new service.
2. You are your organisation's SuperUser, and you should be onboarded by Keesing directly. You should also read the section in this document about SuperUsers!

3. Your organisation may choose to use the Single Sign On (SSO) connection path. If this is possible then make sure your SuperUser and IT Administrator know that you are a user. Most companies have some type of IT ticketing system where users can request access to connected resources such as DocumentChecker v2.

How can I find out who my organization's SuperUser is?

Most often this is the person responsible either for managing or administrating the teams of document checkers. It may be the senior user or team manager.

In large organisations personnel can change or move around, and it might take time to find who the SuperUser person is.

If you cannot find your SuperUser then Keesing can help you set up a new person in this role according to your subscription permissions. Keesing can also help you to find the financial controller in your organisation responsible for invoice processing. That person should also be able to identify who within your organisation administrates use of DocumentChecker.

If you connect to DocumentChecker v1 today without having to login then your IT department must have supported a direct connection to Keesing. You should speak to your IT administrator to find out who organised and approved this connection. If your organisation connected in this way then it may prefer to make use of the Single Sign On (SSO) method in future.

Will my access to DocumentChecker stop suddenly?

The older DocumentChecker v1 service will cease to operate after 30 June 2023. If you have not moved to the new v2, then your user account will cease to work.

Keesing will issue periodic reminders to subscribers by email. Within the DocumentChecker v1 user interface Keesing will also publicise the service closure, as well as providing directions to reconnect with the new service.

SuperUsers

What is my role in moving my organisation to the new DocumentChecker v2?

The SuperUser role remains very similar in both versions of the service. The SuperUser has some editorial access to some product features in the service, but mostly the role is about administrating your own organisations users.

SuperUsers are responsible to allocate and invite users in their organisation to the DocumentChecker platform. The v2 service uses a new identity platform so SuperUsers must onboard their organisation's users to this platform using the onboarding tools provided by Keesing. SuperUsers are invited directly to this subscriber onboarding tool.

As a SuperUser do I need to move to the new DocumentChecker v2?

Yes, you do. You are the first person to move.

SuperUsers cannot onboard themselves so <u>the first step</u> is to be onboarded by Keesing to the new v2 service. Keesing will try to contact the SuperUser in your organisation and invite them to onboard to the v2 platform, but if you have not received such an invitation then this may be because of personnel changes in your organisation. Please contact the Keesing Technical Helpdesk so that we can help you re-establish a new SuperUser.

I do not know who all my users are?

Depending on how your organisation has onboarded its users in the past then Keesing may be able to help you with this.

If you are your organisation's current SuperUser for DocumentChecker v1 then you will be able to see your account profile of users. If your password needs renewal then you can contact the Keesing Technical Helpdesk which has a procedure for this.

I am not the SuperUser for v1, but my organisation has asked me to take care of this role for v2?

First of all, congratulations on your promotion to SuperUser!

Please contact us via the Keesing Technical Helpdesk so that we can onboard you to this role soon as possible.

Don't forget that both v1 and v2 systems will work in parallel until 30 June 2023 so you have time to organise and set up on your side. We are here to help.

I have a lot of users to onboard, is there an easier option?

Yes indeed. At the time the original DocumentChecker v1 platform was established the use of Single Sign On was limited. This background has changed.

Keesing uses the Microsoft Azure B2C platform for user identity management. This offers the possibility of Single Sign On. This will be available early in 2023.

Meantime you should speak with your organization IT administrator to understand your internal procedures for adding the DocumentChecker v2 SaaS application to your organisation's approved list.

This process may take a little time on your side, but Keesing has allowed a period of parallel operation with the current v1 and future v2 platforms to soften the migration process.

If you know now that you would like to move to the use of SSO to connect your organisation's user IDs directly with Keesing then please let us know by email and we will return to you as soon as the software release with SSO is ready.

As a SuperUser what is my most important objective?

You are the service administrator for your organisation's use of DocumentChecker and we hope you will find some of the improved product features to your liking.

Keesing sees your main objective to begin the move to the new v2 platform, and for you to invite and encourage your fellow users to follow you. You may all continue to use the v1 platform until 30 June 2023, so this can take a little time.

The user numbers in the v2 platform will ultimately be determined by the number of users when your subscription is next renewed. If you are thinking of changing your system users then you might take advantage of the coming months to do this in stages.

Do I need to do anything about switching off the older v1 service?

The v1 service will cease to operate from 30 June 2023, at which point your old subscription account for this service will stop working.

You may contact Keesing to deactivate the older account earlier if you or your organisation policy requires this. Of course, we recommend that you check that you have migrated all of your licensed users before doing this.

IT Administrators

Does the service change have any effect on me?

There are three possibilities to consider here.

1. Your organisation may already connect directly to the DocumentChecker domain using IP address authentication
    a. This method will be discontinued with the v2 release, and only supported in v1 until 30 June 2023. You should consider moving to SSO before then.
2. Your organisation may have embedded some DocumentChecker URLs in its software environment
    a. This method will not be supported in the v2 release, and only supported in v1 until 30 June 2023.
        i. You should reset any embedded URLs in your environment to the new main URL for the v2 release
        ii. From 30 June 2023 URLs beginning with www.documentchecker.com/rdo.dll/enter? will be redirected to an information page.
    b. The v2 release includes UI customisation features for individual users that may meet your requirements
        i. You can begin using this version now and establish whether these will meet your needs

      ii. You might consider using instead the DocumentChecker API which offers you the possibility of a direct integration to your systems of Keesing DocumentChecker data.

3. You may wish in future to use Single Sign On for easier access and user ID management of your users

    a. SSO will become available in Q1 2023. You will need to migrate to this before 30 June 2023.

Can we make use of the Single Sign On (SSO) option to connect our users securely?

Yes. We recommend this as the best way to connect and manage your users' identities for our service, and we expect that this will help to simplify your administration of your service users, in line with more modern resource management practice.

Our SSO service will become available with the next release in Q1 2023.

Financial controllers/administrators

Do we need a new subscription or contract for the new service on DocumentChecker v2.0?

No, the v2 service is available to any customer of the v1 platform with a current subscription. It is also available in parallel, which means you can use both platforms until the v1 service is discontinued, provided you have a valid subscription with Keesing.

I do not make technical decisions, who should I speak to?

We expect that your organisation will have a technical or senior user for the Keesing service. This person may be the original buyer or approver. Keesing will be pleased to speak directly to them to assist with the service change, and we ask simply that you connect us for this purpose.

If perhaps your technical or SuperUser has moved from that role in your organisation then we can also work with you to find out who your main users are and onboard a new SuperUser in your organisation who can easily make the service changes.

The best Keesing contact for you is our Customer Support team

Customer.service@keesingtechnologies.com

I do not know who all our users are

Keesing can help you to find your users if your organisation has given them recognisable names when they were registered by your DocumentChecker account SuperUser.

The first person to check with is the SuperUser within your organisation. If this person has moved on, then other users will be able to identify the department or team lead responsible for the business function that uses DocumentChecker.

Our subscription is due for renewal soon, does this effect the migration from v1 to v2?

If you are renewing your subscription then the important thing to take note of is the number of users enabled in the renewal.

When you renew you will choose the subscription package most suitable to you, and the number of users on this renewal will be configured in your v2 account profile.

Your SuperUser has the admin rights to determine who these users will be, and your SuperUser should move these users to the new v2 platform. If there are fewer users in your renewed subscription then users who are not moved to v2 will lose the service when the earlier subscription expires.

We have renewed our subscription in 2023 but are having some trouble to move our priority users to the v2 platform

Keesing is making both the v1 and v2 platform available in parallel until 30 June 2023. You may use both. You have until this date to move your priority users to the v2 platform. Thereafter users remaining on v1 will lose access to the service.

Other documentation

Keesing provides documentation in support of its products and services. You may find some of the following documents helpful.

- *KeesingDocumentChecker_v1_EndOfLife Notice_20221231*

- *KeesingDocumentChecker_v2_Release Notes*

- *KeesingDocumentChecker_v2_SuperUser Manual*

- *KeesingDocumentChecker_v2_Quick User Guide*

- *KeesingDocumentChecker_v2_Moving to Single Sign On (*document available in January 2023)*

- *Product Announcement_DC_Offline_v1.2_20220831*

- *DocumentChecker_v2_FAQs_v1.0*

- *DocumentChecker_API_Service Guide_v1.0 (*document available in January 2023)*

Further questions

If you have further questions about moving from the v1 to the v2 DocumentChecker service then you can contact the Keesing Technical Helpdesk here:

Web: www.keesingtechnologies.com

Email: helpdesk@keesingtechnologies.com

Telephone: +31 (0) 20 7157 857