Software Setup Guide

General Software

> ***Upload your photo!***
> As a remote team, we like all the chances to see one another face we can get. As you are going through setting up your software, be sure to upload your photo so we can see you!

Internal Messaging: Slack

Metal Toad uses Slack for internal instant messaging. It's hard to overstate how much happens in the chat, *so get online as soon as you can.* There are a variety of channels that you can browse, but you will be added to a few by default. Slack works in browsers but we like to use the Slack App for Mac. (There's also an App for your phone)

> **IMPORTANT:** Slack is secure (good for sending passwords) and information is deleted (bad for documenting things).

Slack Training & Certification

☐ [Slack Basics Certification](#) (90 minutes)

Conferencing: Zoom

Metal Toad supports [Zoom](#) as the primary virtual meeting space tool. When scheduling a meeting with remote participants, select one of four Zoom spaces for phone and video conferencing. Prior to your first meeting install the Zoom launcher, test it and learn to use it by setting up a video conference with your parents. Get really comfortable with the control panel, changing audio and video sources, screen sharing and the like.

Also be sure to install the [Zoom Scheduler for Chrome](#), which allows you to quickly and easily set up Zoom meetings in your Google Calendar.

Zoom Pro Accounts
Without a Pro Zoom license (additional cost) any meetings you host will be limited to 45 minutes. If you think you will need a pro account, please check with your manager to see if you have been assigned one.

Zoom Training & Certification

☐ [Getting started with Zoom](#) (31 min)

☐ [Zoom Security Basics](#) (10 min)

☐ [Executive Presence on Video Conference Calls - via LinkedIn](#) (34 min)

HRIS: BambooHR

[BambooHR](#) is our Human Resources Information System (HRIS) which provides a directory of all team members and a place to store important dates (hiring, promotion, etc) as well as tracking training and time off. Login in is done by using your @metaltoad.com Google account, so no password set up is needed.

BambooHR Documentation

☐ [BambooHR for Employees](#) (10 min)

Password manager: Lastpass

Best practices when managing passwords, especially shared passwords, is to use a password manager. At Metal Toad we use [Lastpass](#). An account should be created using your @metaltoad.com email address and [the plugin](#) should be installed in your browser.

NOTE: Once signed in you should set up Multi Factor Authentication (MFA).

Lastpass Training

☐ [Lastpass 101](#) (35 minutes)

MFA: Google Authentication

In order to keep our applications secure, Metal Toad requires Multi Factor Authentication (MFA) setup. This involves installing an app on your phone (Google Authentication) and

- [Google Authentication for Android](#)
- [Google Authentication for iPhone](#)

You can learn more about how this works in this [Google Authenticator training video](#) (7 min).

Office Suite - Google Workspace

Metal Toad's supported office software solution is Google's Workspace including:

- Gmail - Our corporate email
- Calendar - Everyone maintains their schedule so other team members can check their calendar for availability. Meetings should be accepted or rejected.
- Contacts - comes with contact information for other folks at Metal Toad
- Drive - contains shared drives by department
- Docs - Google's version of Word
- Sheets - Google's version of Excel
- Slides - Google's version of PowerPoint

IMPORTANT: Make sure to set up 2-Step Verification for Google Workspace or it will lock you out after 2 weeks.

Google Workspace training

☐ Google Workspace Training - 10 lessons (7 hrs to 15 hrs)

Amazon Partner Portal

As an AWS partner, all team members at Metal Toad should have an account on the Amazon Partner Portal. This is required for pursuing AWS certifications and AWS provided partner training

AWS training

☐ AWS Cloud Practitioner Certification partner Learning Plan (14 hrs)
☐ **AWS Certified Cloud Practitioner Exam (90 mins)**

Production Software

Some tools are only used by developers and other people in Production.

Time Tracking: Float

If you are in the Production department, you'll need to get set up on [Float](#) so you can track your time. If you have your Metal Toad Google account set up, you can login by authentication without having to create a new password.

Float Training

- ☐ [Logging Time in Float](#) (5 min)

Ticketing: Jira

At Metal Toad we make extensive use of Jira & Confluence for project tickets and documentation. As a Production team member a user should be created for you so you can access our [Jira instance](#).

Jira Training

- ☐ [Jira Fundamentals Badge](#) (90 min) - all Production team members
- ☐ [Jira Essentials with Agile Mindset - Badge](#) (8 hrs) - **PMO ONLY**

UI Design: Figma

If you are a member of the Production team you'll need access to the platform we use to for our UI designs.

- ☐ [Figma: Handoff to developers](#) (5 min) - **Production only**

Code Repository: GitHub

If you are a developer, you'll need an account on GitHub because all of our work is done collaboratively. We make extensive use of the [GitHub code repo](#). A system Administrator will reach out for your github username to invite to the Metal Toad github organization. All github users are required to use Multi Factor Authentication (MFA) on their account.

GitHub Training - ENGINEERING ONLY

- ☐ [Introduction to Git and GitHub](#) (16 Hours) - **Engineering ONLY**

Visual Collaboration: Miro

If you are a member of the PMO team.

Miro Training & Badging

- ☐ [Miro essentials](#) (45 min) - **PMO ONLY**
- ☐ [Mapping & diagramming](#) (45 min) - **PMO & ARCHITECTS ONLY**
- ☐ [Collaborative meetings](#) (45 min) - **PMO ONLY**
- ☐ [Client collaboration](#) (60 min) - **PMO ONLY**

Sales & Marketing Software

Some tools are only used by specific departments or divisions.

CRM: Hubspot

If you are on the Sales, Marketing, or Recruiting teams at Metal Toad, you'll need to get set up in our Client Relationship Manager. This tracks communication with customers Read the [CRM handbook](#) and how-to for how we use the system.

User accounts will be setup for you in Hubspot, and the following Hubspot integration should be installed:

- [Hubspot + GMail Integration](#)
- [Hubspot + Google Calendar](#)

After getting the plugins installed, please set up Multi Factor Authentication on your account.

Hubspot Training & Certification

- ☐ [Getting Started With Account-Based Marketing (ABM)](#) (19 mins)
- ☐ [HubSpot's integration with LinkedIn Sales Navigator](#) (5 mins)
- ☐ [How Slack Integrates with HubSpot](#) (5 mins)
- ☐ [HubSpot Sales Software Certification](#) (1.5 hrs)
- ☐ [Inbound Sales Certification](#) (3 hrs)

Prospecting: LinkedIn (Sales Navigator)

When prospecting for new leads at Metal Toad, sales professionals can take advantage of the advanced capabilities of LinkedIn Sales Navigator.

LinkedIn Training

- ☐ [Rock Your LinkedIn Profile](#) (57 min)
- ☐ [Learning LinkedIn Sales Navigator](#) (45 mins)

Digital Signature: Docusign

Signatures on SOWs/Contracts/MSAs are routed through [Docusign](#) as much as possible. Prior to your first signature request, get comfortable with the user interface and workflow. (If you do a lot of signing of documents here's also [an App for your phone](#)).

Docusign Training

☐ [Send Your First Envelope](#) (30 min)