

Tip Sheet

xchangedocs

Administrator Profile Creation (When No Administrator Currently Exists)

September 2020

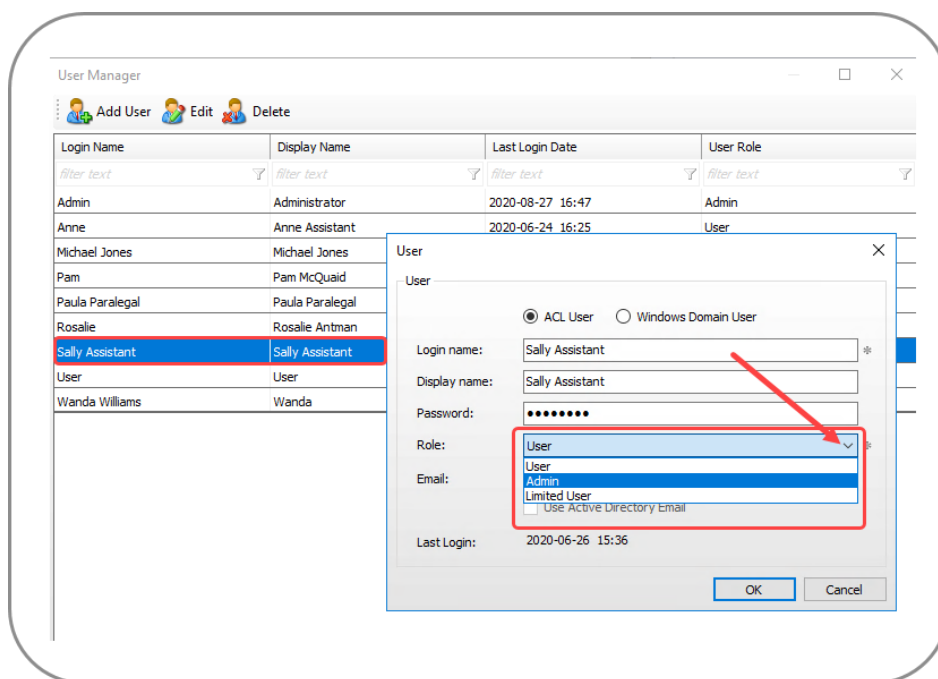
Please note that whenever possible, a firm should always appoint a minimum of two **xchangedocs** administrators. If this is not possible, and you have only one **xchangedocs** administrator (who subsequently leaves the firm), a new administrator must be assigned to that role.

The two essential functions of the **xchangedocs** administrator are:

- Creating or deleting user accounts.
- Assigning users to existing matters so that they can share documents.

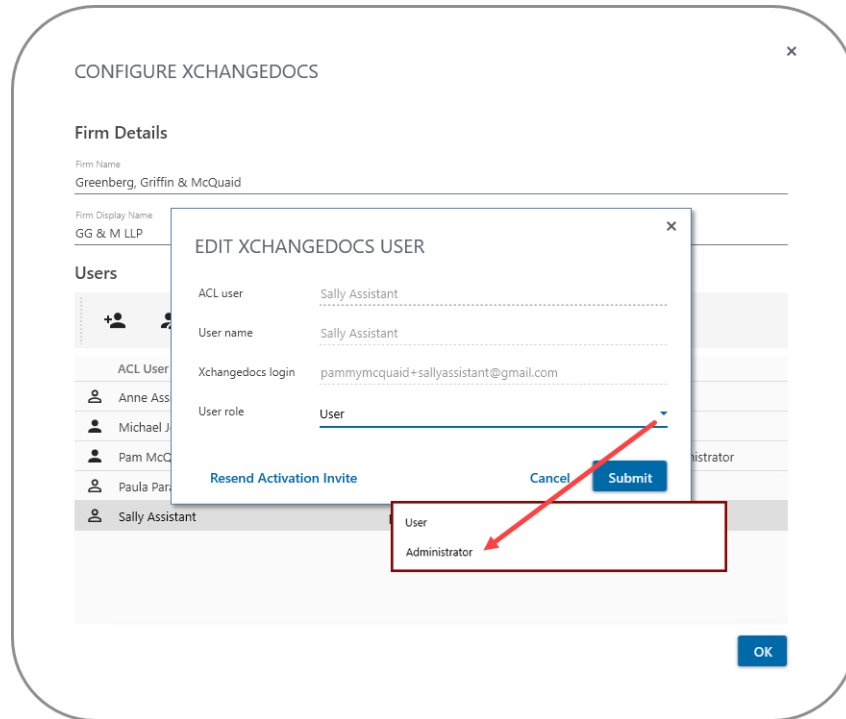
Without an administrator, the essential functions will not be accessible. A quick option for assigning a new administrator is to login to ACL (and **xchangedocs**) using the former administrator's user profile (if known) and complete the following:

1. The new **xchangedocs** administrator must also be an ACL Administrator – this is a necessity. To confirm that the intended administrator's ACL user role is set to **Admin**, navigate to the **Menu → Configuration → Manage Users**. Locate the user's profile and double-click on their record. If their **Role** is set to **User**, this should be changed to **Admin** by selecting the role from the drop-down. Click **OK** to save the changes.



2. Once the ACL Role of the new **xchangedocs** administrator has been set to **Admin**, the user's **xchangedocs** User Role must now be edited. From the **Menu → Configuration → Configure xchangedocs**, locate the User profile for the new administrator and double-click

the record to edit. In the **User role** drop-down, select **Administrator**. Click **OK** to save the changes.



If it is not possible to use the former administrator's login credentials because their user accounts have been deactivated, please contact us for assistance. We kindly ask that you provide us with the new administrator's **xchangedocs** username, which should be the individual's email address. With this information, we can submit a request to our Services Team, and they will assign a new xchangedocs administrator. Please note that in order to adhere to proper security protocol, this request may take up to 24 hours.

NOTE: Once the new administrator profile is set, we strongly suggest that you create an additional **xchangedocs** administrator in order to maintain uninterrupted use of all administrator functions.