

FAQ Guide Administrators

xchangedocs – ACL

June 2020

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1 FAQs: Passwords and Account Access

This section addresses FAQs related to creating and registering user accounts:

1.1 I'm trying to create a user account in **Configure xchangedocs**, but the user's name doesn't appear in the ACL Users List. What should I do?

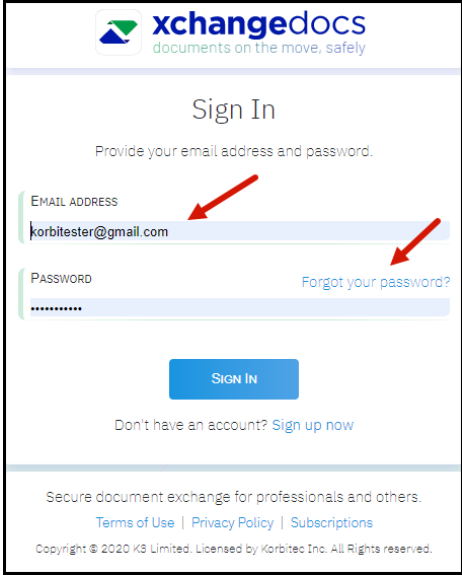
Question	I'm trying to create a user account in xchangedocs , but the user's name doesn't appear in the ACL Users List. What should I do?
Answer	Check to ensure that the user has first been added in the Manage Users database. If they are in this database, check to see that there is an email address in their profile - if there is no email, you will need to add one. Go back to Configure xchangedocs - the user should then appear in the ACL Users List.

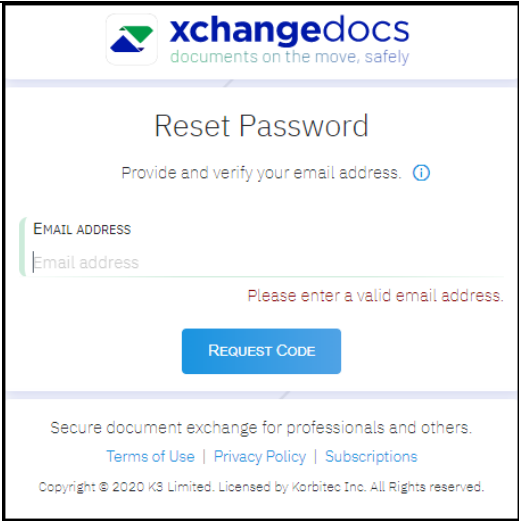
1.2 A user that I recently added hasn't received an **xchangedocs** activation email. What should I do?

Question	A user that I recently added hasn't received an xchangedocs activation email. What should I do?
Answer	The user can login to xchangedocs in ACL by clicking the Login button on the xchangedocs touchpoint in ACL. The system will know that the activation request was emailed. Alternatively, you can re-send the xchangedocs activation invite to the user by opening their xchangedocs profile and clicking Resend Activation Invite .



1.3 A user is trying to login to **xchangedocs** in ACL, but their password isn't working / they've forgotten their password. How can I help them?

Question	A user is trying to login to xchangedocs in ACL, but their password isn't working / they've forgotten their password. How can I help them?
Answer	<p>Users can reset their password by clicking the xchangedocs Login icon in ACL, and then selecting the Forgot your password? link. They will need to provide and verify their email address to do this.</p> <p>Passwords can also be maintained in the web portal. Users can visit www.xchangedocs.ca and follow these steps:</p> <ol style="list-style-type: none">1. Click the sign in button and enter their email address associated with their account.2. Click the Forgot your password? Link.  <ol style="list-style-type: none">3. Enter their email address and click Request Code.

		
<p>The code will be sent to their email. Copy the code and paste into the verification window.</p>		

1.4 Do users need a password when using **xchangedocs**?

Question	Do users need a password when using xchangedocs?
Answer	Yes. Users should make a note of the password that was created when their xchangedocs account was created.

1.5 I'm trying to add another **xchangedocs** Administrator, but the option is not available in the user's **xchange**docs profile. What should I do?

Question	I'm trying to add another xchangedocs Administrator, but the option is not available in the user's xchange docs profile. What should I do?
Answer	<p>In order to be an xchangedocs Administrator, a user's account must also be an ACL Administrator.</p> <p>Navigate to Menu → Configuration → Manage Users. Ensure the user's account is set to Admin and then Save. Navigate back to the</p>

	xchangedocs menu, and you will now be able to change the user to an Administrator.
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1.6 A user was added as a **File Participant**, but they can't see the **xchangedocs** icons. What should I do?

Question	A user has been added as File Participant, but they can't see the xchangedocs icons. What should I do?
Answer	If a user is added as a File Participant after the first xchangedocs share occurs, their xchangedocs icon will be need to be 'activated' before they can view/use xchangedocs for the matter. Navigate to the file and open the File Details tab. Ensure the user has been added as a File Participant , if they have been, and the xchangedocs icon is greyed-out, click on the icon to activate. Save the file.



2 FAQs: Sharing / Classifying Documents

This section addresses FAQs related to the sharing and classifying of documents:

2.1 A user is attempting to upload a document and is getting a warning message advising that they're not associated with a Firm Member. How can I fix this?

Question	A user is attempting to upload a document and is getting a warning message advising that they aren't associated with a Firm Member. How can I fix this?
Answer	This means that the user's ACL User account was not connected to their Firm Member Profile . To resolve the issue, go to Data → Our Firm Members and open the user account: <ol style="list-style-type: none">1. Click on the magnifying glass beside the ACL User field at the top.2. Select the user from the List3. Save the profile.

