

# Quick Start Guide

## xchangedocs – ACL Administrator

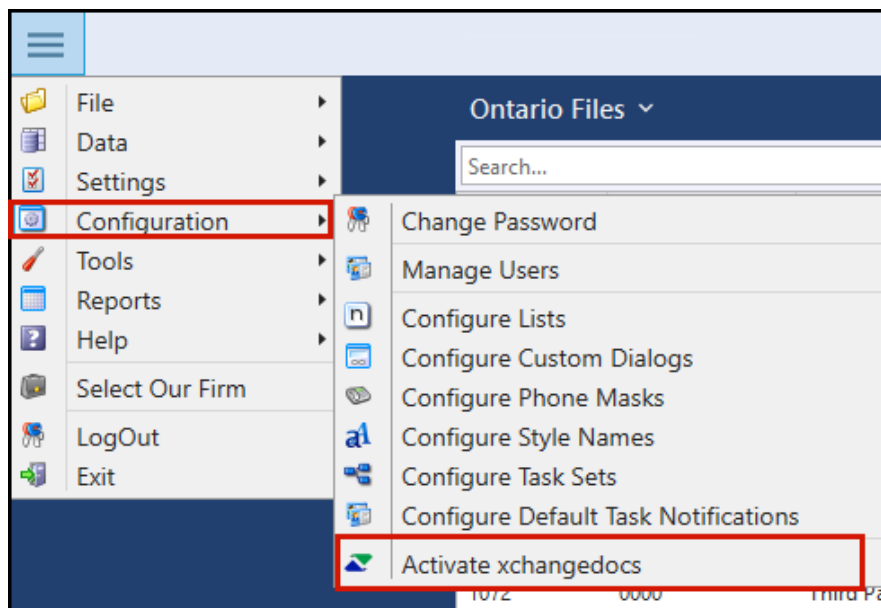
June, 2020

# 1 Getting Started

**YOU MUST BE AN ACL ADMINISTRATOR IN ORDER TO ACCESS THE ADMINISTRATOR MENU AND FUNCTIONS. CONTACT YOUR FIRM'S CURRENT ACL ADMINISTRATOR FOR ADDITIONAL INFORMATION AND ASSISTANCE.**

## 1.1 Activate xchangedocs

When the **xchangedocs** plugin has been installed on ACL, you will need to activate the application. From the **Admin menu**, select **Configuration** → **Activate xchangedocs**.



In the **Activate xchangedocs** window, ensure that all fields are complete and accurate, then click the **SUBMIT** button.

## 1.2 Create ACL User / Firm Member Profiles

In order to create an **xchangedocs** user account, you first need to create an **ACL User Profile** and **Firm Member** profile. If this step has already been completed, go to the next step: **1.3 Create an xchangedocs Profile**.

To create the **ACL User / Firm Member** profiles, go to **Admin menu** → **Data** → **Our Firm members**, and select **Add Firm Member**. Complete all required user details and save the profile.

**NOTE:** In the **ACL User** profile, ensure that the email address for the user is entered correctly in the **Email** field.

The screenshot shows a 'New Firm Member' form with the following sections and callouts:

- User Details:** 'ACL User' field with a search icon and '+ Add User' button. Callout 1 points to the search icon.
- Lawyer Details:** 'This person is a' dropdown menu with 'Lawyer' selected. Callout 2 points to this dropdown.
- Contact Details:** 'Region' field. Callout 3 points to this field.
- Firms:** A list of firms with checkboxes: 'Greenberg and Griffin LLP (Toronto)', 'Greenberg and Griffin LLP (Vancouver)', and 'Greenberg, Griffin & McQuaid (Toronto)'. Callout 4 points to the list.

Buttons at the bottom: 'Add Another', 'OK', 'Cancel'.

### 1.3 Create an **xchangedocs** Profile

To create an **xchangedocs** profile for a user, go to the **Admin menu** → **Configuration** → **Configure xchangedocs**. Complete the following steps:

1. Select the **Add User** icon.
2. From the drop-down menu at **ACL user**, select the required user profile.
3. The **User name** field will pre-populate with the name of the chosen user.
4. The **xchangedocs login** field will pre-populate with the email address associated with the user's ACL profile. If the email address is not showing, you may need to go back to the ACL user profile and turn off "use active directory email" and manually type in the user's email address.
5. The **User role** field will automatically designate the profile to **User**.
6. Click the **SUBMIT** Button.

## 1.4 Completing the **xchangedocs** Registration

Once an **xchangedocs** profile is created, the user will receive an email from xchangedocs requiring them to complete the registration process. The user needs to click on the **ACTIVATE ACCOUNT** button to complete the registration of their account, and:

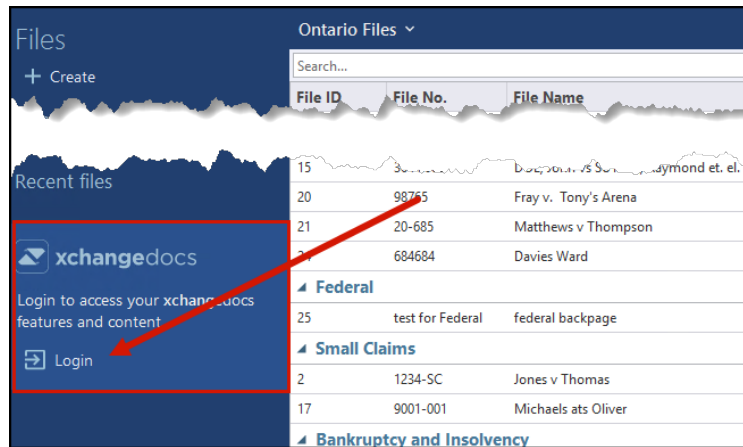
- The email should be their work email address.
- They need to create their own password.
- They need to check their email for the 2-step authentication.
- This same email and password is used to login on the web portal at [www.xchangedocs.ca](http://www.xchangedocs.ca).

**NOTE:** Users are responsible for the maintenance of their passwords.



## 1.5 User Login to **xchangedocs** in ACL

Once all the above steps are complete, the user can login to xchangedocs in ACL using their xchangedocs credentials used to create their profile (step 1.2 above).



## 1.6 Additional Information

If you require additional information or have questions, please see our **FAQ Guide for Administrators**, or email our support team at [support@xchangedocs.com](mailto:support@xchangedocs.com).