

FAQ Guide Users

xchangedocs – ACL

June 2020

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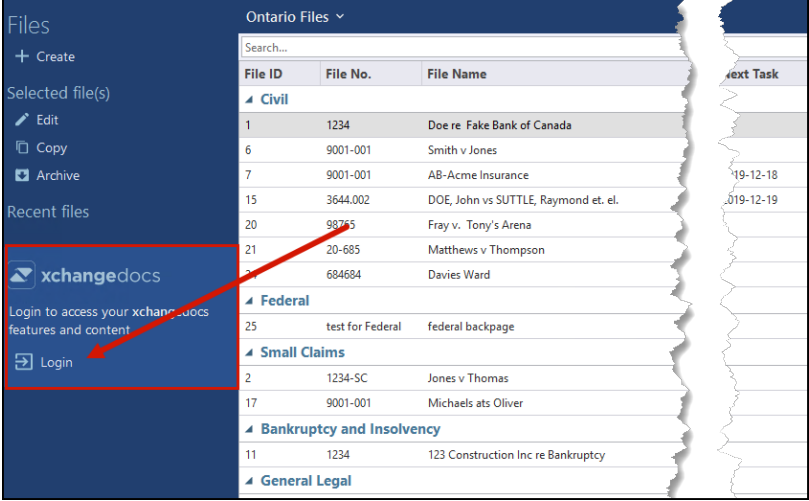
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1 FAQs: Passwords and Account Access

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

1.1 I haven't received an xchangedocs activation email yet – what should I do?

Question	I haven't received an xchangedocs activation email yet – what should I do?
Answer	<p>You can login to xchangedocs in ACL by clicking the Login button on the xchangedocs touchpoint. The system will know that the activation request was emailed.</p>  <p>Alternatively, check your email junk folder to see if it's there. If you are still not able to log in, contact your ACL Administrator to have them re-send the xchangedocs activation invite.</p>

1.2 I don't see **xchangedocs** in ACL – what should I do?

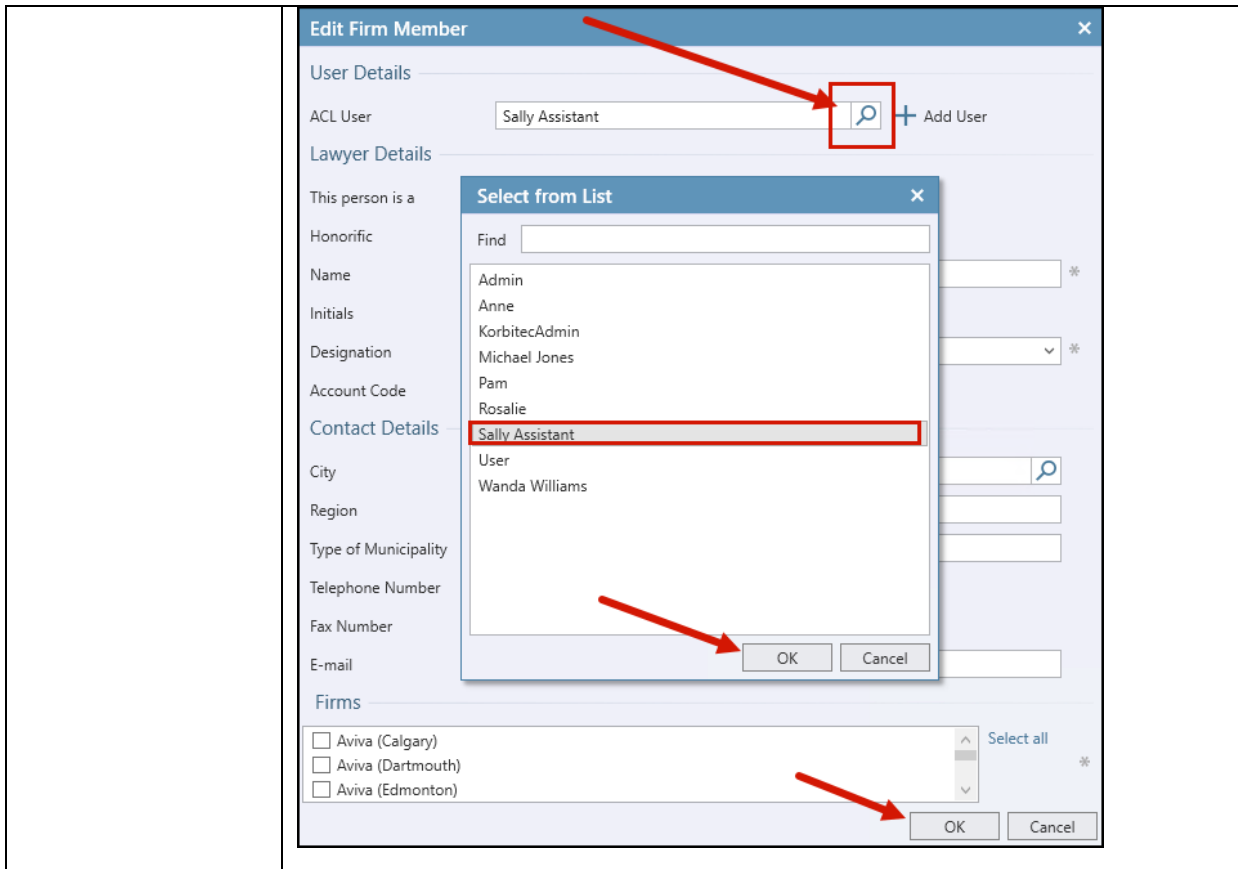
Question	I don't see xchangedocs in ACL – What should I do?
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Answer	Contact your ACL Administrator. It's possible that your account has not been activated yet and they will be able to resolve this.
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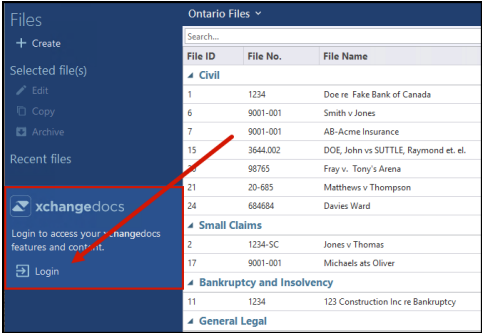
1.3 I'm trying to upload a document and I get a warning message telling me that I'm not associated with a Firm Member. How can I fix this?

Question	I'm trying to upload a document and I get a warning message advising that I'm not associated with a Firm Member. How can I fix this?
Answer	<p>This means that your ACL User account was not linked to your Firm Member Profile. Your <u>ACL Administrator</u> must resolve the issue by following the instructions below.</p> <p>From the Admin menu --> Data → Our Firm Members, open the user's profile, and:</p> <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.





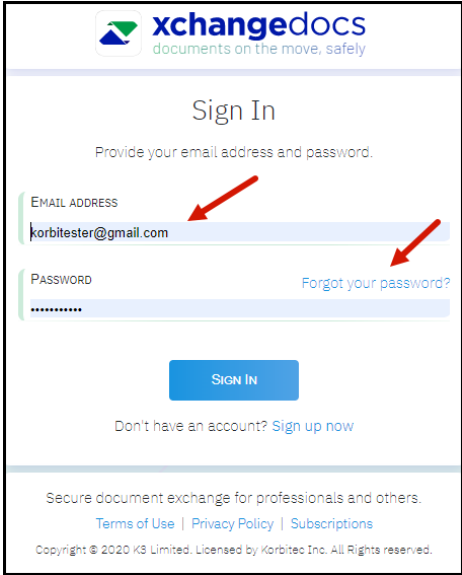
1.4 Do I need a password when using xchangedocs?

Question	Do I need a password when using xchangedocs?
Answer	<p>Yes. Make a note of the password that was created when your xchangedocs account was created. In ACL, you will need to Login to xchangedocs where shown:</p> 

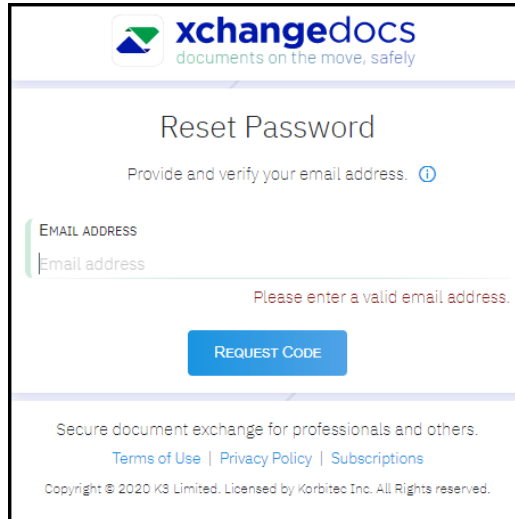
1.5 I'm trying to login to **xchangedocs** in ACL, but my password isn't working. What should I do?

Question	I'm trying to login to xchangedocs in ACL, but my password isn't working. What should I do?
Answer	Try logging in to xchangedocs using the web portal at www.xchangedocs.ca . If the password works there, please email our support at ACLsupport@korbitecinc.com for assistance.

1.6 I forgot my **xchangedocs** password. What should I do?

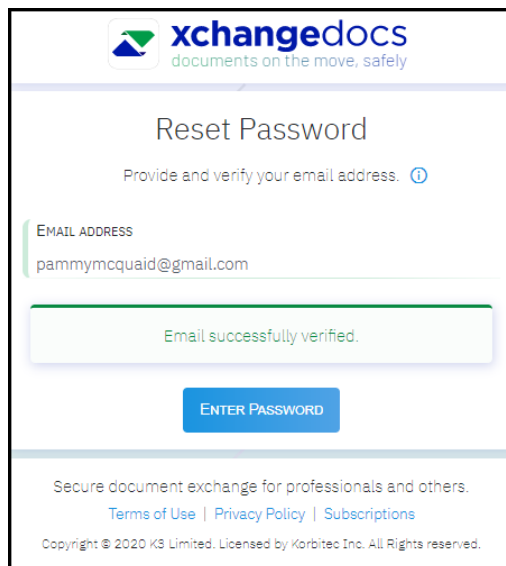
Question	I forgot my xchangedocs password. What should I do?
Answer	<p>Passwords can be maintained in the web portal. Visit www.xchangedocs.ca and follow these steps:</p> <ol style="list-style-type: none"> 1. Click the sign in button and enter your email address associated with your account. 2. Click the Forgot your password? Link. 

3. Enter your email address and click Request Code.



4. The code will be sent to your email. Copy the code and paste into the verification window.

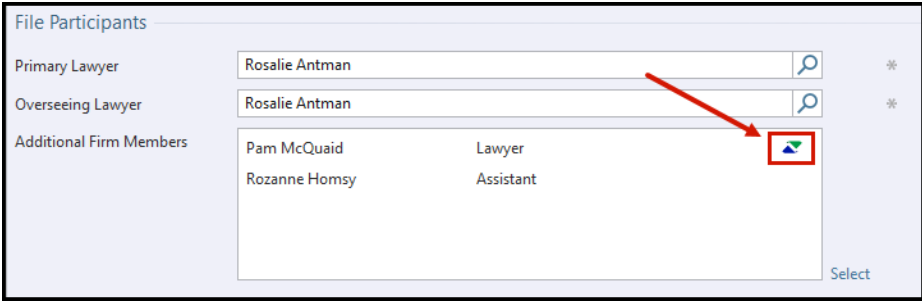
5. Your email will be verified after which you can then enter a new password.



2 FAQs: Sharing / Classifying Documents

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

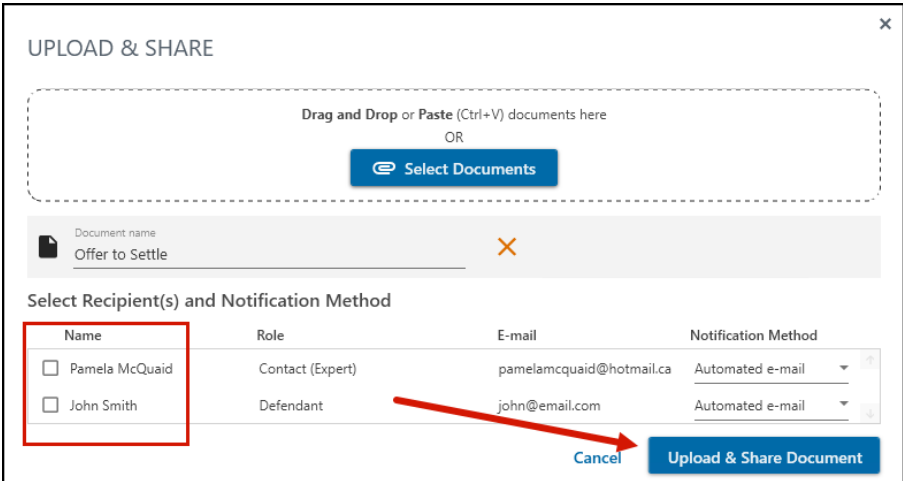
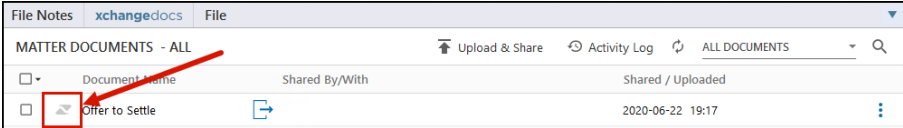
2.1 I can't see shared documents on my file in ACL. What should I do?

Question	I can't see shared documents on my file in ACL. What should I do?
Answer	<p>Check to ensure that you have been added as a 'participant' on the file. Alternatively, if you were added as a participant, but after documents started to be shared on the file, then you will need to be added by the ACL Administrator or another xchangedocs participant on the file.</p> <p>If you don't see the xchangedocs symbol beside your name in the File Participants list, you won't see shared documents.</p> 

2.2 How do I send or share a document?

Question	How do I send or share a document?
Answer	<p>Highlight the file/matter, select the xchangedocs tab at the bottom of the screen, then click Upload & Share. Select the file(s) to be shared and choose the recipient (recipients must either be a party or a contact with an email address on the file). Click Upload & Share Document.</p>

2.3 How do I share a document with someone in my firm?

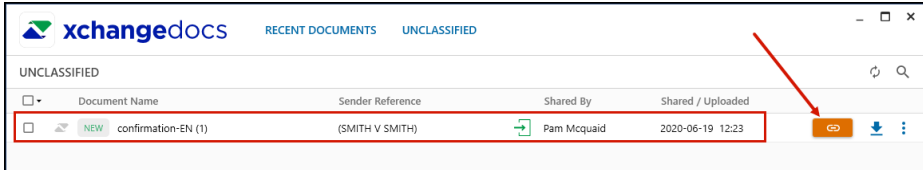
Question	How do I share a document with someone in my firm?
Answer	<p>Upload the document to be shared but <u>do not</u> select a recipient. Click the Upload & Share Document button to continue. The document will then be attached to the file</p>  <p>The icon beside the document name will be grey because it has not been shared, but only attached to the file.</p>  <p>Members of your firm who are xchangedocs participants on the file will then be able to access the document.</p>

2.4 I need to share multiple documents at the same time. How do I do that?

Question	I need to share multiple documents at the same time. How do I do that?

<p>Answer</p>	<p>Create a Zip folder and add the documents you would like to share. In xchangedocs, highlight the file/matter, then click Upload & Share. Select the zip folder you just created and choose the recipient (recipients). Click Upload & Share Document.</p> <p>If you are attaching documents that are not required to be sent in a specific order, you can CTRL+click to multi-select the documents to upload.</p> <p>NOTE: The drag and drop function does not work on unzipped folders.</p>
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2.5 What is classifying a document and how is that done?

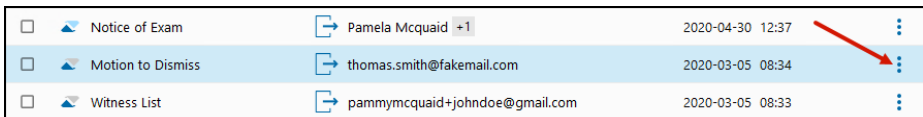
<p>Question</p>	<p>What is classifying a document and how is that done?</p>
<p>Answer</p>	<p>Classifying is the linking of a received document to a Matter/File. Highlight the document, select the orange classify document icon on the right, select the desired matter from the drop-down, then click the blue Classify icon.</p>  <p>The screenshot shows the xchangedocs interface with a table of documents. The table has columns for Document Name, Sender Reference, Shared By, and Shared / Uploaded. A red box highlights the row for 'confirmation-EN (1)' with sender '(SMITH V SMITH)' and shared by 'Pam McQuaid' on '2020-06-19 12:23'. A red arrow points to an orange icon with 'ed' on it, which is the 'classify document' icon mentioned in the text.</p>

2.6 When sharing documents, why are there two E-mail Notification Methods?

<p>Question</p>	<p>When sharing documents, why are there two Notification Methods?</p>
<p>Answer</p>	<p>To allow users the option to add additional information to the recipient.</p> <p>Automated e-mail notifications are pre-worded templates that do not</p>

	<p>change – they originate from the Microsoft Server and may not be recognized by your recipient(s).</p> <p>Personalized e-mail notifications will open a new email message where additional details can be added to the intended recipient – these emails originate from your email account and can be trusted by recipients.</p>
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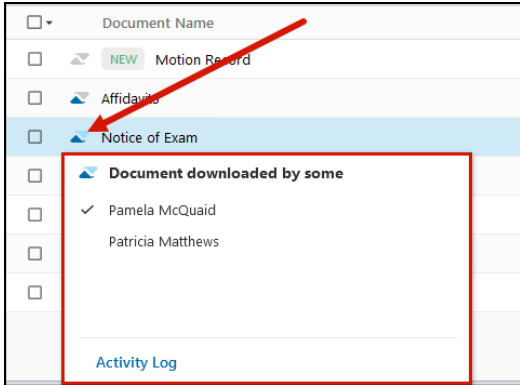
2.7 I've made changes to a document that I shared. How do I share the new version?

Question	<p>I've made changes to a document that I shared. How do I share the new version?</p>															
Answer	<p>In the xchangedocs tab at the bottom, highlight the document in the list and select Upload New Version from the menu on the right. Select the modified file to be shared. The system remembers the recipients from the original document share and will include them automatically. Click Upload new version.</p>  <table border="1" style="margin-top: 10px;"> <tr> <td><input type="checkbox"/></td> <td> Notice of Exam</td> <td> Pamela Mcquaid +1</td> <td>2020-04-30 12:37</td> <td></td> </tr> <tr style="background-color: #e0f0ff;"> <td><input type="checkbox"/></td> <td> Motion to Dismiss</td> <td> thomas.smith@fakemail.com</td> <td>2020-03-05 08:34</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td> Witness List</td> <td> pammymcquaid+johndoe@gmail.com</td> <td>2020-03-05 08:33</td> <td></td> </tr> </table> <div style="margin-top: 10px; border: 1px solid #ccc; padding: 5px;"> <ul style="list-style-type: none"> More Details <li style="border: 2px solid red; padding: 2px;"> Upload new version Download Share Revoke Share Resend Notifications Generate Record of Service Activity Log Delete </div> <p>NOTE: Recipients will be able to download <u>only</u> the most recent version sent to them - if they haven't yet downloaded a previous version.</p>	<input type="checkbox"/>	Notice of Exam	Pamela Mcquaid +1	2020-04-30 12:37		<input type="checkbox"/>	Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34		<input type="checkbox"/>	Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33	
<input type="checkbox"/>	Notice of Exam	Pamela Mcquaid +1	2020-04-30 12:37													
<input type="checkbox"/>	Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34													
<input type="checkbox"/>	Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33													

2.8 I no longer want to share a document. Is there a way to revoke it?

Question	I no longer want to share a document. Is there a way to revoke it?
Answer	<p>Revoking a document is a feature used when you no longer want to share a document with a recipient. Locate the document in the matter/file and open the menu on the right. From the menu, select Revoke Share, select the recipient(s), and select the blue Revoke icon.</p> <p>NOTE: The revoke feature will only work if the shared document has not yet been downloaded by the recipient.</p>

2.9 How do I know if a recipient has downloaded the document I shared?

Question	How do I know if a recipient has downloaded the document I shared?
Answer	<p>In the xchangedocs tab, locate the document and note the colour of the icon on the left side – if the top triangle is blue, then the document has been downloaded by a recipient.</p> <p>You can also click on the icon for more information. If recipients have a checkmark, they have downloaded the document.</p> 

	<p>Alternatively, select the menu icon to the right and click on Activity Log – this will provide a complete history of the document (uploads, shares, and downloads)</p>
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3 FAQs: Features



This section addresses FAQs related to additional features in **xchangedocs**:

3.1 Is there a way to track the history of a shared document?

Question	Is there a way to track the history of a shared document?
Answer	<p>Yes. The Activity Log provides a history of a shared document and functions in two ways. In the xchangedocs tab, the Activity Log icon located across the top of the menu bar will show the history for all documents that have been uploaded, shared, and downloaded for the file. If activity for only one document is desired, then the document can be highlighted, and Activity Log selected from the menu icon on the right.</p>

3.2 What do all of the icons mean?

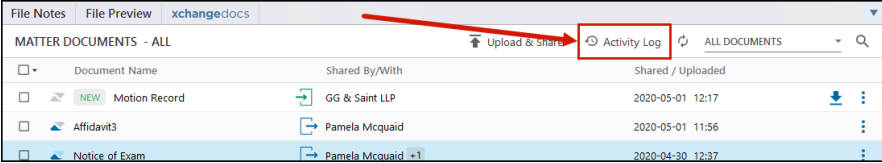
Question	What do all of the icons mean?	
Answer	<p>Green icons denote incoming shared documents.</p> <p>Blue icons denote outgoing shared</p>	
		<p>This can represent any of the following:</p> <ul style="list-style-type: none"> • An incoming document that is not yet classified. • A document that is uploaded for internal sharing. • A document that has no selected recipients but is an outgoing document.
		<p>An incoming document that has been classified.</p>
		<p>An outgoing document that was shared but not yet downloaded by the recipient.</p>

		An outgoing document that was shared and downloaded by some, but not all recipients.
		An outgoing document that was shared and downloaded by all recipients.

3.3 I need a Record of Service. Where do I find this?

Question	I need a Record of Service. Where do I find this?
Answer	After a document has been shared, highlight the document and open the menu on the right. Select Generate Record of Service and then select the desired recipient in the list. Click the blue Generate icon to complete the assembly of the Record of Service in Microsoft Word.

3.4 Is there a way to create an Audit Report?

Question	Is there a way to create an Audit Report?
Answer	<p>Yes, there are two options for tracking document activity.</p> <ol style="list-style-type: none"> 1. An activity report for a specific document can be created by highlighting the document, selecting the menu on the right, and then selecting Activity Log. 2. An activity report for <u>all documents</u> on a specific matter can be created for the active matter by click the Activity Log button from the menu bar.  <p>Both Activity Log reports can be exported for additional use.</p>