

# Quick Start Guide

xchangedocs – ACL User

July 2020

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# 1 Getting Started

A user will need to activate their **xchangedocs** account before they can begin using it.

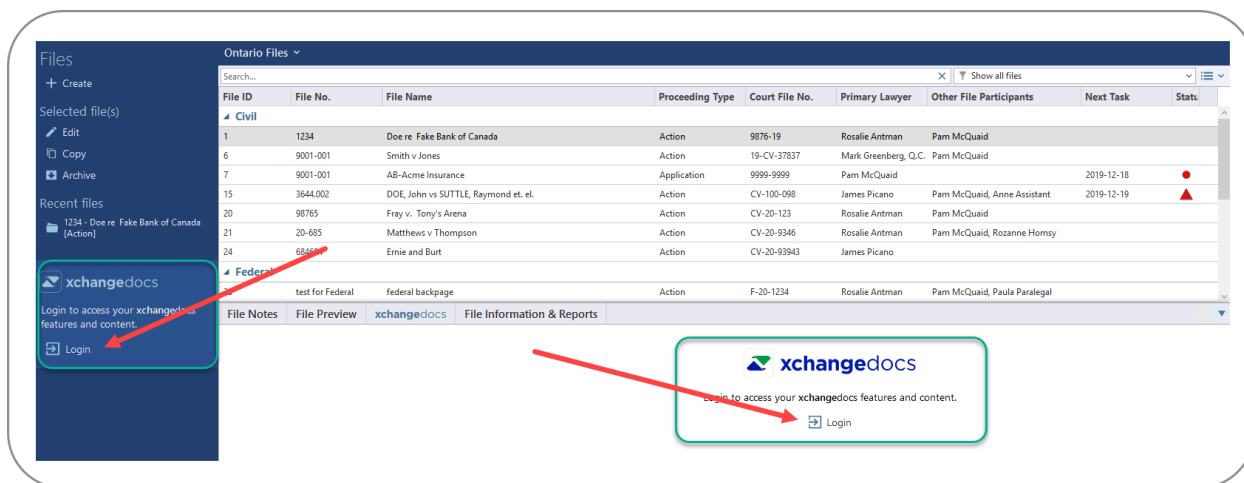
## 1.1 Activating your Account

The Administrator will configure your xchangedocs account within ACL. Once the account has been configured, you will receive an “activation” email.

In the activation email, click the **ACTIVATE ACCOUNT** button to begin the registration of your xchangedocs account, and complete the following:

- The user name should be your work email address.
- Create your password.
- Check your email inbox for the 2-step authentication.

If you have not yet received the activation email, you can still login to **xchangedocs** in ACL by clicking the **Login** button on the **xchangedocs** touchpoint. The system will know that the activation request was sent.



## 1.2 Adding Matter Participants

Members of your firm can be added as **xchangedocs** participants on a matter by first selecting them as an **Additional Firm Member** on the ACL file (**File Details** section).

File Information

Firm File Number: 1234

File Name: Doe re Fake Bank of Canada \*

File Type: Civil \*

Proceeding

Proceeding Type: Action \*

File Participants

Primary Lawyer: Rosalie Antman \*

Overseeing Lawyer: Rosalie Antman \*

Additional Firm Members

|             |        |  |
|-------------|--------|--|
| Pam McQuaid | Lawyer |  |
|-------------|--------|--|

Select

If the **xchangedocs** icon beside their name is greyed-out, click to activate them.

File Participants

Primary Lawyer: Rosalie Antman

Overseeing Lawyer: Rosalie Antman

Additional Firm Members

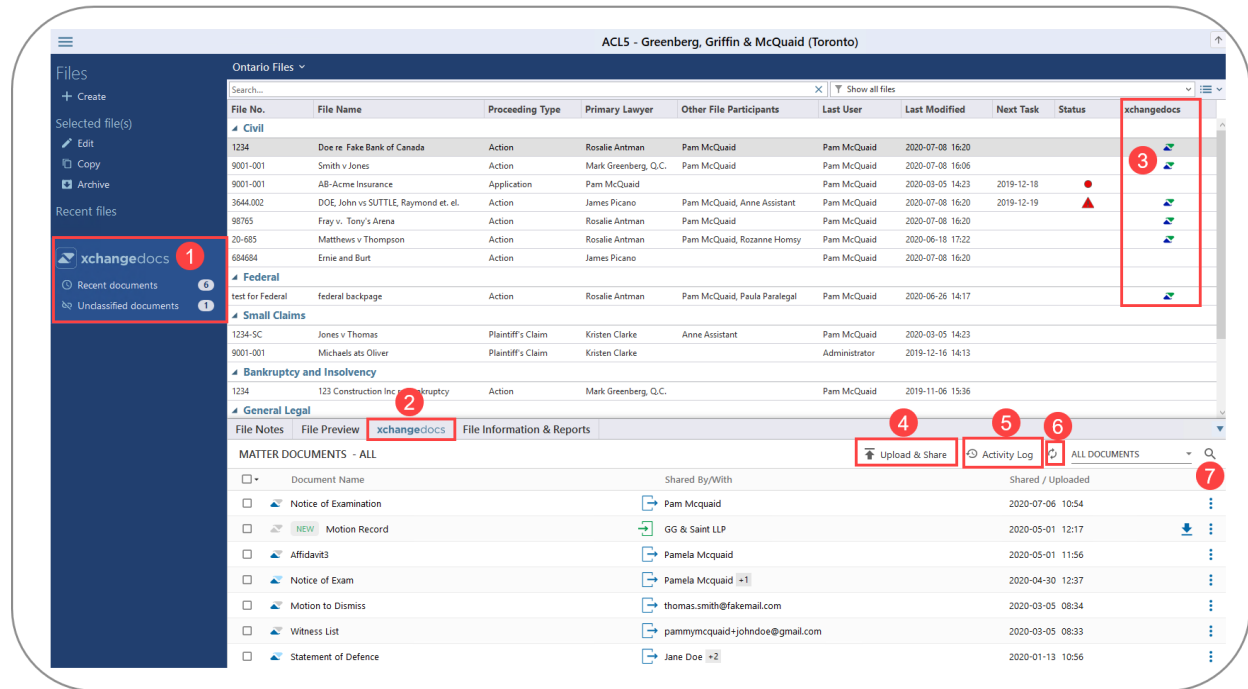
|             |        |  |
|-------------|--------|--|
| Pam McQuaid | Lawyer |  |
|-------------|--------|--|

Select

File Participants are members of your firm who will access **xchangedocs** on a matter. Participants may be added/updated at any time, however adding Participants to the matter before the first **xchangedocs** activity occurs is best-practice because it ensures the required firm members will have immediate access to the xchangedocs tab and any incoming or outgoing documents.

## 2 Interface Overview

When using **xchangedocs** in ACL, the interface will appear as shown:



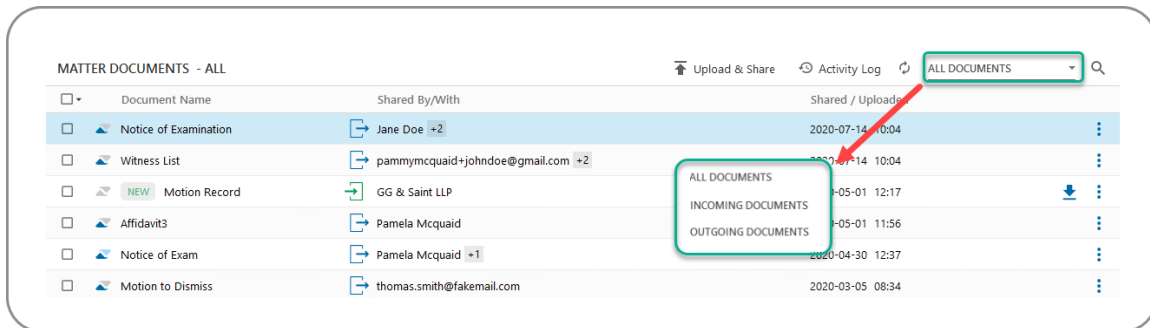
- 1 The **xchangedocs** notification window on the left, shows the number of recent documents shared and the number of **Unclassified** documents received once you have logged into **xchangedocs**.
- 2 The **xchangedocs** tab within the **Files** list opens the workspace to display the **xchangedocs** activity.
- 3 A new **xchangedocs** column indicates which files have **xchangedocs** activity.
- 4 Select the **Upload & Share** icon in the **xchangedocs** workspace to initiate a document share.
- 5 The **Activity Log** for a specific Matter can be accessed at any time. It contains a history of all documents that have been added, uploaded, and shared.
- 6 Click the refresh icon to update the workspace to reflect all shared documents on a Matter.
- 7 Additional options for managing a shared document are located within the menu on the right.

## 3 Managing the Workspace

Users can modify the **xchangedocs** workspace to suit their preferences.

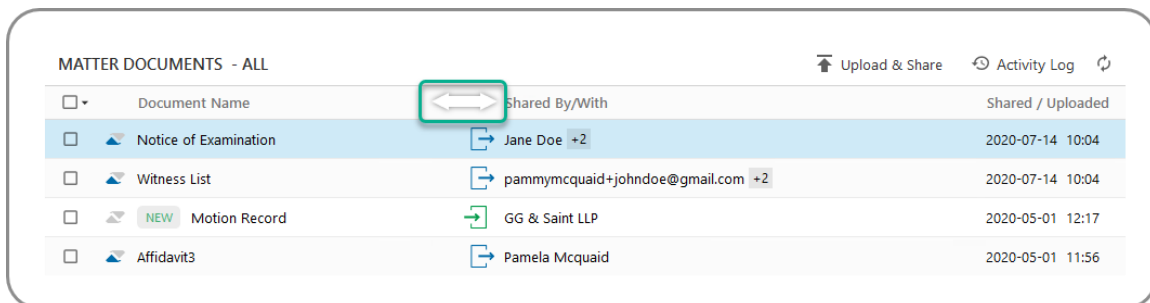
### 3.1 What to Display

You can display **All Documents**, **Incoming Documents**, or **Outgoing Documents** for a specific Matter by selecting from the drop-down.



### 3.2 Column Adjustment

The columns for **Document Name**, **Shared By/With**, and **Shared/Uploaded** can be made wider or narrower. Hover the cursor beside the column name to reveal the double arrow and adjust as desired.



### 3.3 Sort Selection

The list of documents can be sorted by any of the column headings. Click on the desired heading to sort the list by that category. Clicking once will sort the list in ascending order, while clicking it twice will sort the list in descending order.

| MATTER DOCUMENTS - ALL  |                           |                   | Upload & Share |
|-------------------------|---------------------------|-------------------|----------------|
| Document Name           | Shared By/With            | Shared / Uploaded |                |
| ACL Sample file for Pam | Dant LLP                  | 2019-10-30 11:33  |                |
| Affidavit3              | Pamela Mcquaid            | 2020-05-01 11:56  |                |
| NEW Motion Record       | GG & Saint LLP            | 2020-05-01 12:17  |                |
| Motion to Dismiss       | thomas.smith@fakemail.com | 2020-03-05 08:34  |                |
| Notice of Exam          | Pamela Mcquaid -1         | 2020-04-30 12:37  |                |

## 4 Working with Documents

### 4.1 Upload a New Document

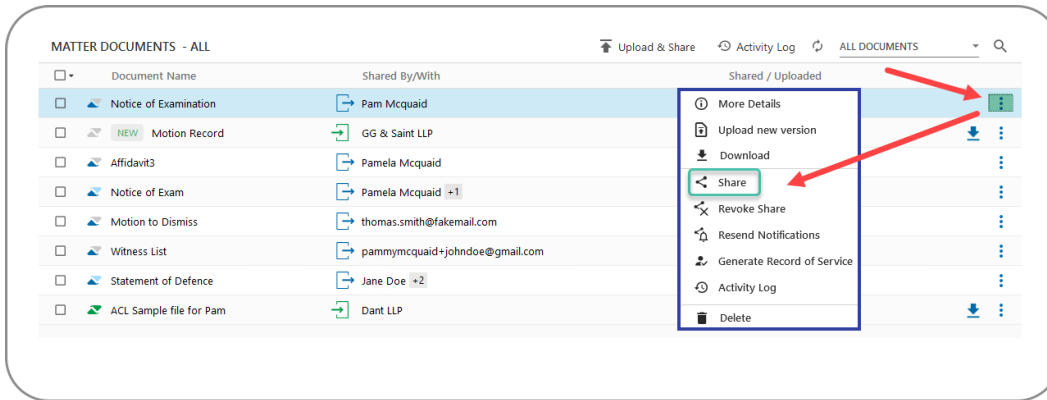
Select the 'Upload & Share' button located on the menu bar. More than one document can be selected to be uploaded at a time, with the option to update the document description. Once the documents have been uploaded successfully, they will be shown in the **xchangedocs** tab.

| MATTER DOCUMENTS - ALL   |                |                   | Upload & Share | Activity Log | ALL DOCUMENTS |
|--------------------------|----------------|-------------------|----------------|--------------|---------------|
| Document Name            | Shared By/With | Shared / Uploaded |                |              |               |
| NEW Statement of Defence | Pam Mcquaid    | 2020-07-08 12:17  |                |              |               |
| Motion Record            | Pam Mcquaid    | 2020-07-08 12:10  |                |              |               |
| Affidavit                | Pam Mcquaid    | 2020-07-08 12:06  |                |              |               |
| Offer to Settle          |                | 2020-06-22 19:17  |                |              |               |
| Notice of Examination    | Pamela Mcquaid | 2020-06-22 16:46  |                |              |               |

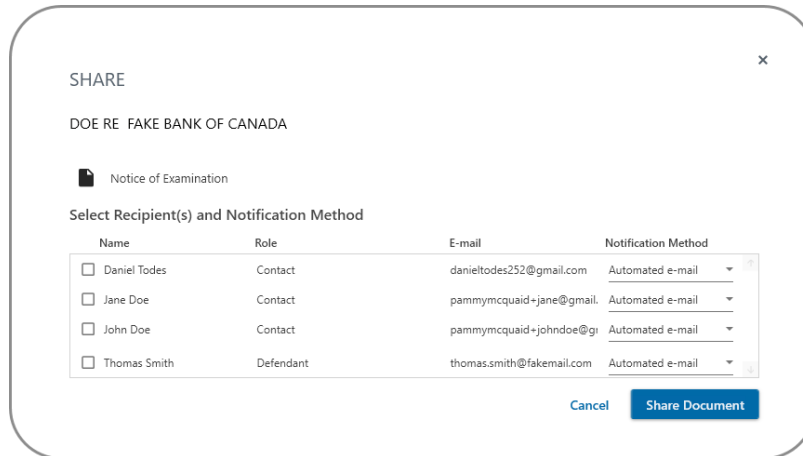
As part of the upload process, you have the option to select which **Recipients** you want to send the document to. Do not select any **Recipients** if you only want to upload the document to the matter for internal sharing. **Uploaded** documents can be shared at any time.

### 4.2 Sharing an Existing Document

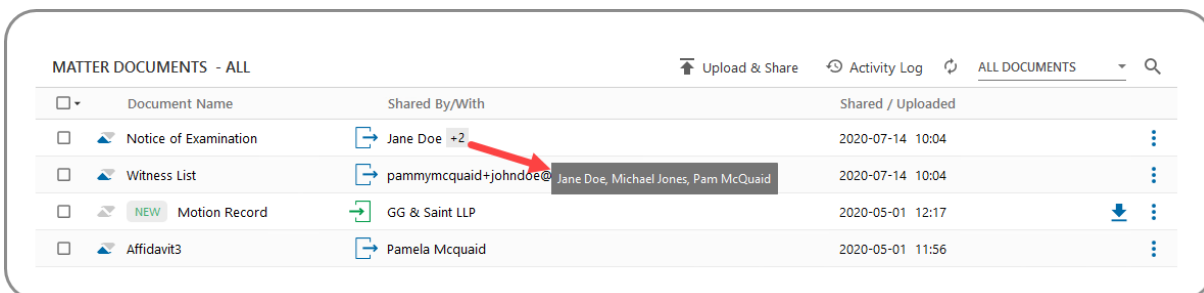
An existing document can be shared to additional recipients. To do this, select the document and then choose **Share** from the menu located to the far, right side. To upload and share a new document, please see section 4.1, above.



In the **Share** window, select the recipients you want to share the document with, and select the **Notification Method**.

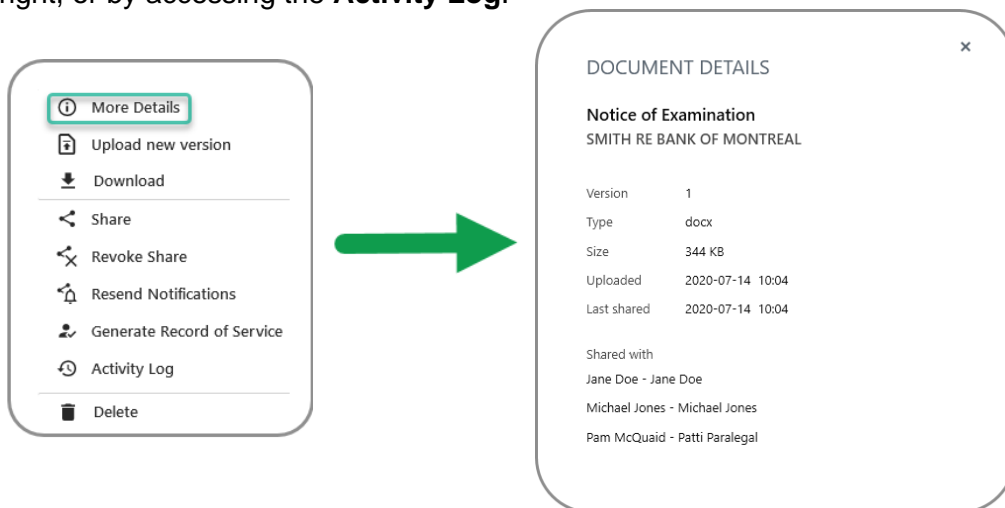


Once shared successfully, a new icon will appear in the **Share By/With** column displaying the number of recipients to whom the document has been shared with.



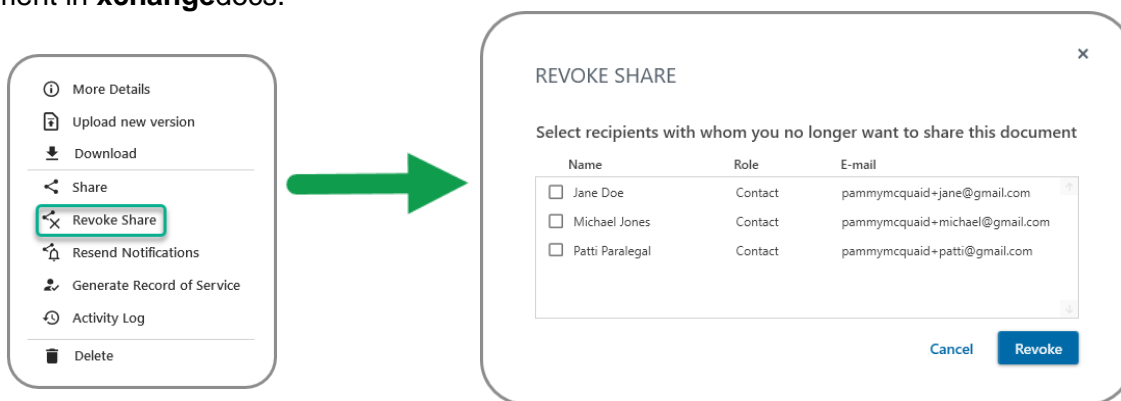


Additional details of the document share can be found by selecting **More Details** from the menu on the right, or by accessing the **Activity Log**.



### 4.3 Revoke a Shared Document

A shared document can be revoked, at any time, by selecting the **Revoke Share** option from the menu on the right. Once revoked, the recipient will no longer be able to access the document in **xchangedocs**.



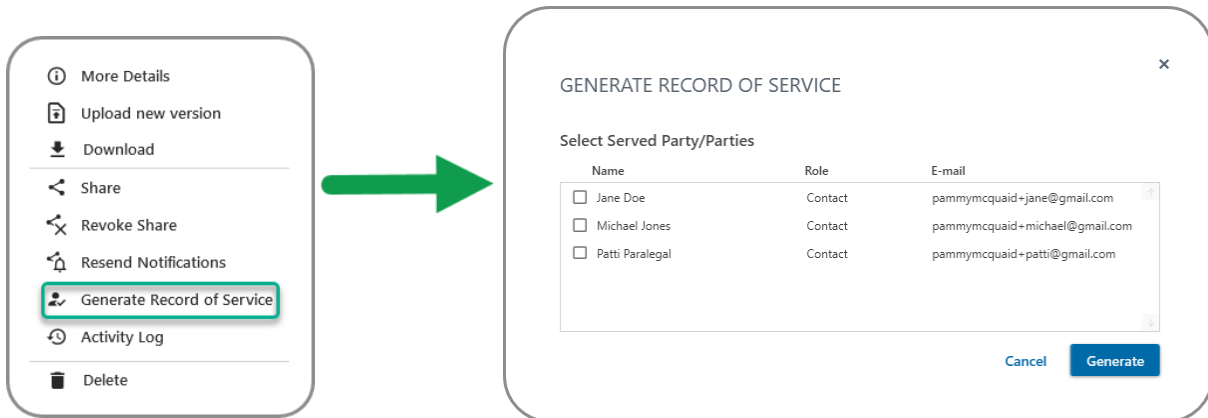
**NOTE:** The revoke feature will always work, however, if a recipient has already downloaded the document, they may have a saved copy available to them. As well, a recipient's access should be revoked before deleting a document otherwise they may still be able to access it.

## 5 Record of Service

If a record of sharing a document is required for proof of Service under Rule 16.09 (4.1), the Record of Service replaces an Affidavit of Service.

### 5.1 Create a Record of Service

A **Record of Service** can be generated by selecting **Generate Record of Service** from the menu on the right.



Select the **Recipients** to whom the document was served. The **Record of Service** will then be created in MS Word.