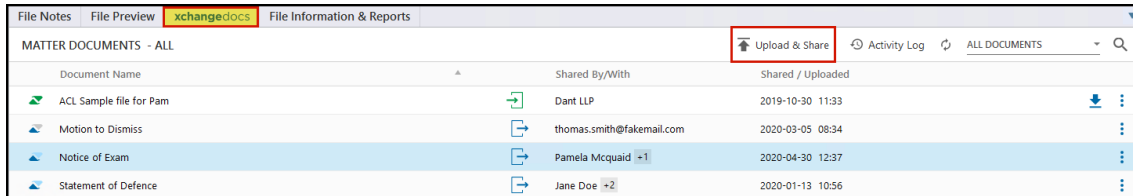


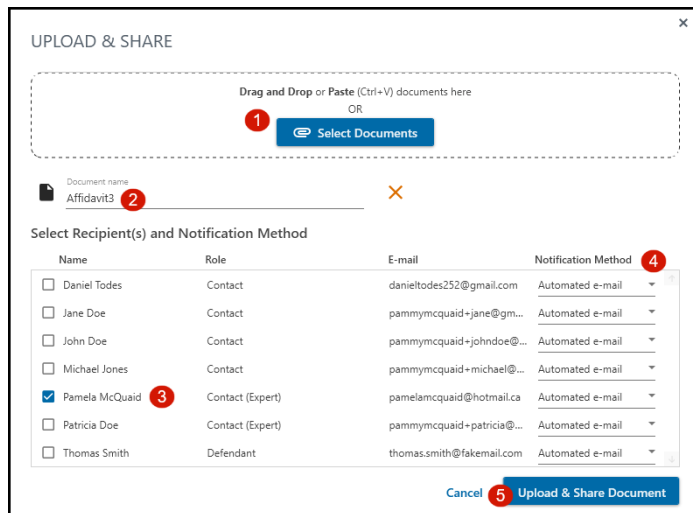
## SHARING OR SERVING A DOCUMENT

Sharing or serving a document with another individual begins by uploading the document in the **xchangedocs** workspace. Highlight the file in the Files list and select the **Upload & Share** icon to initiate the process.



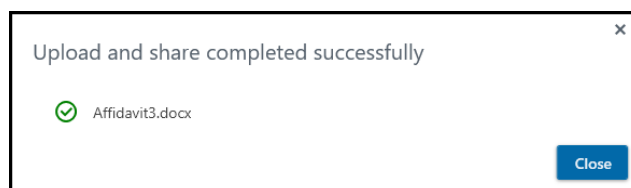
When the **Upload & Share** window appears, users are prompted to:

- 1 **Drag and Drop, Paste** the document(s) or click the **Select Documents** button.
- 2 The document name will be presented which can be modified, if required.
- 3 Select the desired **Recipient(s)** from the available list. The names in the list are populated from the list of parties and contacts added to the file.



**NOTE:** Only those Parties, Contacts, and Opposing Contacts which have an email address in their contact details will be shown in the Recipients list. Lawyers representing opposing parties must also contain the lawyer's email address in their contact details.

- 4 Select the Notification Method.
- 5 Click the **Upload & Share Document** button. When the upload is complete, a confirmation will appear. Click the **Close** button and the shared document will then appear in the **xchangedocs** workspace.



Document Name	Shared By/With	Shared / Uploaded
Affidavit3	Pamela McQuaid	2020-05-01 11:56
Notice of Exam	Pamela McQuaid +1	2020-04-30 12:37
Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34
Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33

If a record of serving the document is required under Rule 16.09 (4.1), the **Record of Service** replaces the Affidavit of Service and can be generated by selecting **Generate Record of Service** from the menu on the right.

Document Name	Shared By/With	Shared / Uploaded
Affidavit3	Pamela McQuaid	2020-05-01 11:56
Notice of Exam	Pamela McQuaid +1	2020-04-30 12:37
Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34
Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33
Statement of Defence	Jane Doe +2	2020-01-13 10:56
ACL Sample file for Pam	Dant LLP	2019-10-30 11:33

- More Details
- Upload new version
- Download
- Share
- Revoke Share
- Resend Notifications
- Generate Record of Service
- Activity Log
- Delete

Select the Recipient(s) to whom the document was served.

**GENERATE RECORD OF SERVICE**

Select Served Party/Parties

Name	Role	E-mail
<input checked="" type="checkbox"/> Pam McQuaid	Contact (Expert)	pammymcquaid@gmail.com

Cancel Generate

A **Record of Service** document will then be created in MS Word.

**NOTE:** If a PDF version of the document is served, the **Record of Service** will automatically capture the “**No. of Pages**”. For other file types, users will need to complete this information post-assembly, as shown in the following snapshot.



**ONTARIO  
SUPERIOR COURT OF JUSTICE**

BETWEEN:

JOHN DOE


Plaintiff

and

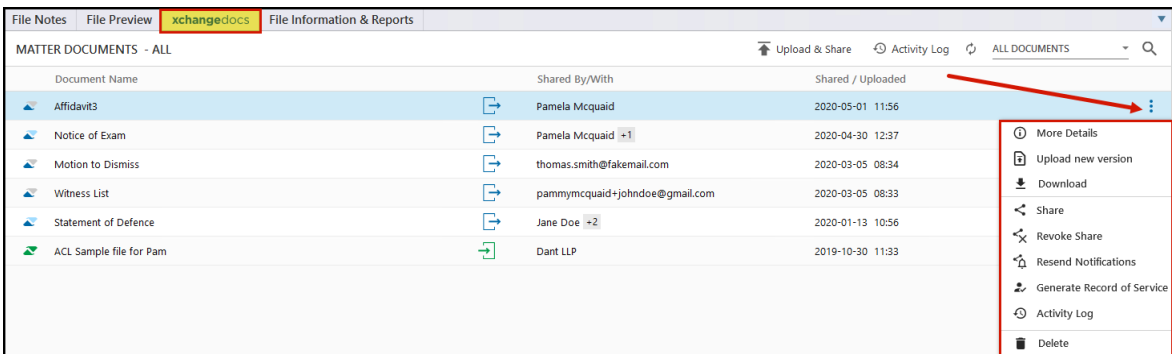
RAYMOND SUTTLE, AMANDA HAAS and BILL HAAS

Defendants

**RECORD OF SERVICE  
(ELECTRONIC DOCUMENT EXCHANGE)**

Document served:	Affidavit3
No of Pages:	[no pages]
Served by:	Pam McQuaid, lawyer with the law firm of Greenberg, Griffin & McQuaid, lawyers for the plaintiff
Served on:	Date and time of service:
Pam McQuaid (pammymcquaid@gmail.com), Contact	December 18, 2019, 10:28 AM
Record of Service generated by  electronic document exchange portal, compliant with Rule 16.09 (4.1) of the Ontario Rules of Civil Procedure, subclauses 16.01 (4) (b) (iii) / 16.05 (1) (c.1) (electronic document exchange)	Link to document served: <a href="https://xd-staging-web-98d54760.azurewebsites.net/recent?document=1816a7c1-2b15-4e9b-ff85-08d77f17c9cd">https://xd-staging-web-98d54760.azurewebsites.net/recent?document=1816a7c1-2b15-4e9b-ff85-08d77f17c9cd</a>

Additional options for a shared document are located by selecting the menu icon on the far right.



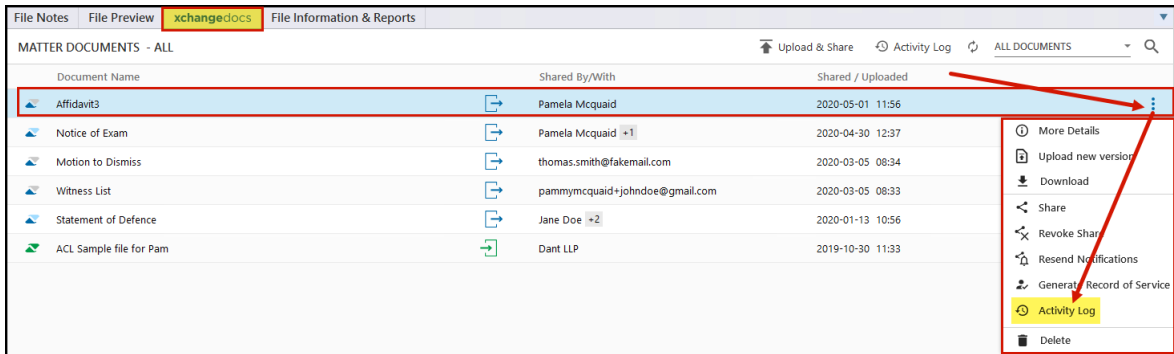
The screenshot shows the 'xchangedocs' interface with a list of documents under 'MATTER DOCUMENTS - ALL'. The 'Affidavit3' document is highlighted, and a context menu is open on the right side, listing various actions such as 'More Details', 'Upload new version', 'Download', 'Share', 'Revoke Share', 'Resend Notifications', 'Generate Record of Service', 'Activity Log', and 'Delete'. A red arrow points to the menu icon for the 'Affidavit3' document.

Document Name	Shared By/With	Shared / Uploaded
Affidavit3	Pamela McQuaid	2020-05-01 11:56
Notice of Exam	Pamela McQuaid +1	2020-04-30 12:37
Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34
Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33
Statement of Defence	Jane Doe +2	2020-01-13 10:56
ACL Sample file for Pam	Dant LLP	2019-10-30 11:33



## TRACKING

Tracking the history of any shared document is accomplished by selecting the menu icon on the right side and then choosing **Activity Log** from the drop-down.

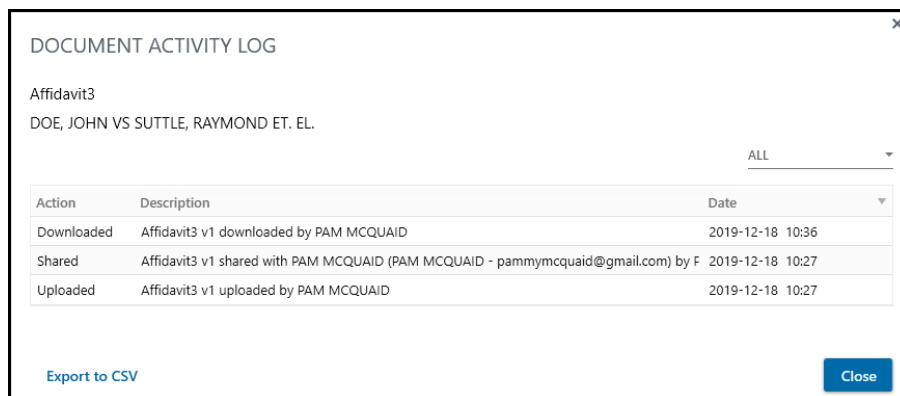


The screenshot shows a web interface with a table of documents. The 'Affidavit3' document is highlighted, and a dropdown menu is open on its right side. The 'Activity Log' option is highlighted in yellow. A red arrow points from the 'Activity Log' option in the dropdown to the 'Activity Log' button in the text below.

Document Name	Shared By/With	Shared / Uploaded
Affidavit3	Pamela Mcquaid	2020-05-01 11:56
Notice of Exam	Pamela Mcquaid +1	2020-04-30 12:37
Motion to Dismiss	thomas.smith@fakemail.com	2020-03-05 08:34
Witness List	pammymcquaid+johndoe@gmail.com	2020-03-05 08:33
Statement of Defence	Jane Doe +2	2020-01-13 10:56
ACL Sample file for Pam	Dant LLP	2019-10-30 11:33

- More Details
- Upload new version
- Download
- Share
- Revoke Share
- Resend Notifications
- Generate Record of Service
- Activity Log**
- Delete

The **Activity Log** window will open to show the history of that particular document, including the date and time of the activity, as well as the name and/or email address of the individual who performed the activity. This data can be exported to Excel by selecting the button **Export to CSV**.



The screenshot shows a window titled 'DOCUMENT ACTIVITY LOG' for the document 'Affidavit3'. The window displays a table of activity logs and an 'Export to CSV' button.

DOCUMENT ACTIVITY LOG

Affidavit3  
DOE, JOHN VS SUTTLE, RAYMOND ET. EL.

ALL

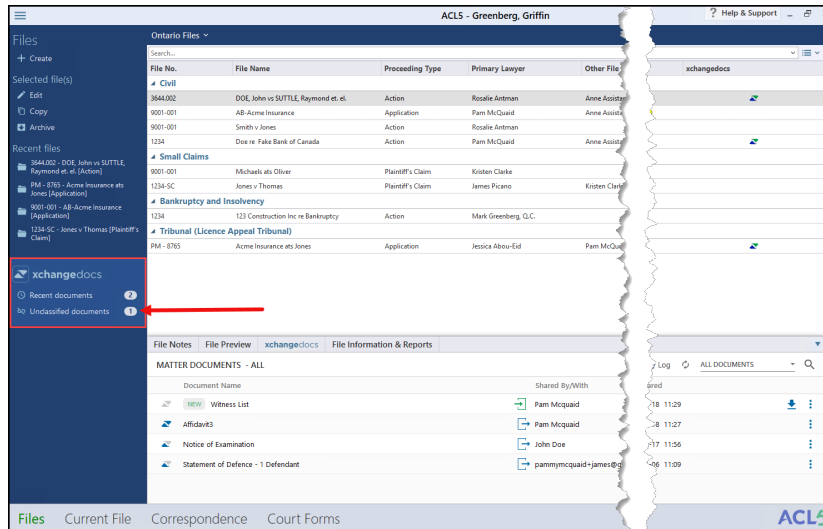
Action	Description	Date
Downloaded	Affidavit3 v1 downloaded by PAM MCQUAID	2019-12-18 10:36
Shared	Affidavit3 v1 shared with PAM MCQUAID (PAM MCQUAID - pammymcquaid@gmail.com) by F	2019-12-18 10:27
Uploaded	Affidavit3 v1 uploaded by PAM MCQUAID	2019-12-18 10:27

[Export to CSV](#) [Close](#)

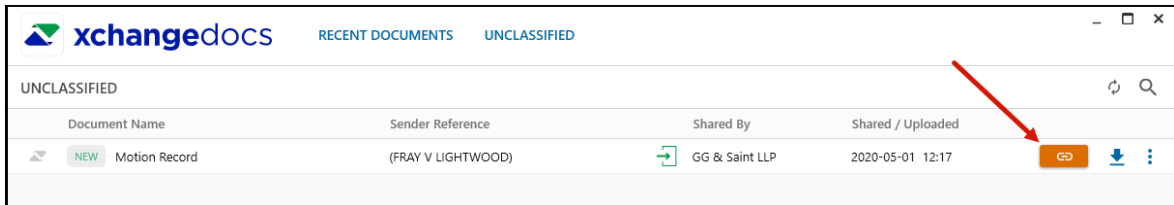


## CLASSIFYING

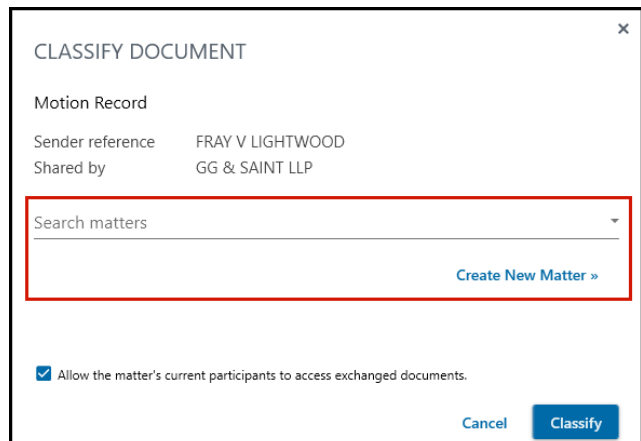
When a document is received by a user which has not been previously 'linked' to an existing Matter, the **xchangedocs** window on the left navigation panel will indicate that there is an "unclassified" document. Click on **Unclassified documents** to begin the classifying process.



The user will see the name of the document, the sender's matter reference, the firm (or individual) who shared the document, and the date. Click on the orange **Classify document** icon.



















This will open the **CLASSIFY DOCUMENT** window where users can choose to link the received document to one of their existing ACL Matters, or **Create New Matter** to which the document should be linked. Once the Matter is chosen, click on the **Classify** button to complete the link.



**NOTE:** The classification process is required only once on the Matter as all subsequently shared documents will be automatically linked. Documents can also be re-classified to different Matters, if required.



The classified document will then be displayed in the **Matter Documents** section of the **xchangedocs** workspace. From here, the document can be downloaded/saved.

Document Name	Shared By/With	Shared / Uploaded
 <b>NEW</b> Motion Record	 GG & Saint LLP	2020-05-01 12:17  
 Affidavit3	 Pamela Mcquaid	2020-05-01 11:56 
 Notice of Exam	 Pamela Mcquaid +1	2020-04-30 12:37 
 Motion to Dismiss	 thomas.smith@fakemail.com	2020-03-05 08:34 
 Witness List	 pammymcquaid+johndoe@gmail.com	2020-03-05 08:33 

## ICONS – AND WHAT THEY MEAN

**Green** icons denote incoming shared documents.

**Blue** icons denote outgoing shared documents.



An incoming document that is not yet classified.



An incoming document that has been classified.



An outgoing document that was shared but not yet downloaded by the recipient.



An outgoing document that was shared and downloaded by the recipient(s).



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

