

## Frequently Asked Questions ACL3

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### **1. QUESTION**

How do I create, edit, select a file?

#### **ANSWER**

In the **All Files** tab, locate the **Files** navigation pane and click on **Create New** or **Edit**. To select a file, locate the **Find** feature in the **Files** navigation pane and click on **Search for** to enter part of the file name or number. The file list will be filtered to display only those files which contain the search criteria.

### **2. QUESTION**

I do not have a file number. Do I need to have one in order to create my file?

#### **ANSWER**

No, you do not need to have a file number in order to create a new file. Simply leave the **File Number** blank and ACL will assign a temporary File ID. You can always add the **File Number** by editing your file at a later time.

### **3. QUESTION**

I have entered a party in as self-represented, but they have now retained counsel. How do I change the party representation?

#### **ANSWER**

In the **All Files** tab, double click on the file you wish to edit. Once the file is open, click on **Parties** in the **Files** navigation pane and highlight the party you wish to edit. Click on **Change Representation** and select the option **To other lawyer**. Complete details as necessary.

### **4. QUESTION**

I have a party represented by counsel and they have now retained new counsel. How do I change the party's representation to reflect this?

### **ANSWER**

In the **All Files** tab, double click on the file you wish to edit. Once the file is open, click on **Parties** in the **Files** navigation pane and highlight the party you wish to edit. Click on **Change Representation** and select the option **To other lawyer**. Complete details as necessary.

### **5. QUESTION**

My proceeding type has changed. How do I change this information, and am I charged an additional license fee for that file? What happens to my original file?

### **ANSWER**

In the **All Files** tab, open your file for editing, click on **Proceeding** and change the proceeding type accordingly. You will then be given the option of saving the new proceeding as a new file or overwriting the original file.

You will not be charged an additional license fee for changing the proceeding type.

If you do not overwrite the original file, it will remain intact.

### **6. QUESTION**

I have entered the role of a party incorrectly. How can I change this?

### **ANSWER**

In the **All Files** tab, double click on the file you wish to edit. Click on **"Lawyers for..." Wording** in the **Files** navigation pane, select the party you wish to edit and choose the correct role from the dropdown menu.

**NOTE:** You may have to **Refresh** the Lawyers for..., Title of Proceedings, Re-Lines and Backpage, in order for the role change to be reflected throughout the file.

## 7. QUESTION

I noticed a spelling mistake in the name of one of my parties in my Title of Proceedings. How do I make this correction?

### ANSWER

In the **All Files** tab, double click on the file you wish to edit. Click on **Parties** in the **Files** navigation pane, highlight the party you wish to edit, choose **Edit Party** from the menu and make the necessary changes.

**NOTE:** You may have to **Refresh** the Lawyers for..., Title of Proceedings, Re-Lines and Backpage, in order for the spelling change(s) to be reflected throughout the file.

## 8. QUESTION

I have just received an address change from a law firm that is contained in ACL. How do I change the address of the law firm?

### ANSWER

There are two ways to update law firm information:

In the **All Files** tab, double click on the file you wish to edit. Click on **Parties** in the **Files** navigation pane. Highlight a party represented by the law firm whose address requires the change, choose **Edit Party** from the menu and edit the law firm details by clicking the **Edit Law Firm** icon in the **Firm Details** section of the dialog. Once the changes are complete, you will receive a message confirming that all other files linked to that law firm will be updated. Click **Yes** and the changes will be saved globally.

or

The update can be completed through your ACL Administrator. This is accomplished by navigating to the Administrative section of the software, clicking on **Data**, clicking on **Other Law Firms**, highlighting the law firm in the list, and then clicking on **Edit** to open the firm's profile for editing.

## 9. QUESTION

Can I edit my Re-lines?

### ANSWER

Yes. In the **All Files** tab, open your file for editing and click on **Re-lines** in the **Files** navigation pane. There are two options for the Re-lines: (1) Opposing Parties; and (2) Clients or Contacts.

Make amendments but remember that the **Re-lines** will need to be edited independently of one another, so if you make changes to one re-line, it will not automatically change the other.

## 10. QUESTION

How can I edit my Title of Proceedings?

### ANSWER

In the **All Files** tab, open the file you wish to edit, and select **Title of Proceedings** on the **Files** navigation pane. Formatting changes may be made manually or by using the formatting toolbar located at the top of the screen. *The Title of Proceedings will be locked if you have assembled a court form on the file. You must **Unlock the document** in order to edit it.*

**NOTE:** Spelling or grammar changes to party names must be made by editing the party details directly.

## 11. QUESTION

How can I edit my Backpage?

### ANSWER

In the **All Files** tab, double click on the file you wish to edit. Once the file is open, select **Backpage** on the **Files** navigation pane. Formatting changes may be made manually or by using the formatting toolbar located at the top of the screen. *The Backpage will be locked if you have assembled a court form on the file. You must **Unlock the document** in order to edit it.*

**NOTE:** Spelling or grammar changes to party names must be made by editing the party details directly.

## 12. QUESTION

How does the **Copy** feature work?

### ANSWER

The **Copy** feature allows you to create an identical copy of an existing file. Use this feature when the parties in your second file are either identical, or the majority of the parties are identical, as in a companion action.

There will be an additional licence fee for creating a **Copy** of a file.

### 13. QUESTION

My client has moved. How do I change the information in the database?

### ANSWER

There are two ways to update client information:

In the **All Files** tab, double click on the file you wish to edit. Click on **Parties** on the **Files** navigation pane. Highlight the party to be updated, choose **Edit Party** from the menu and edit the client details. Once the changes are complete, you will receive a message confirming that all other files linked to that client will be updated. Click **Yes** and the changes will be saved globally.

or

The update can be completed by your ACL Administrator. This is accomplished by navigating to the Administrative section of the software, clicking on **Data**, clicking on **Clients and Contacts**, highlighting the client in the list, and then clicking on **Edit** to open the client's profile for editing.

### 14. QUESTION

I want to see only my files in the file list. Is there a way to accomplish this?

### ANSWER

Yes. In the **All Files** tab, locate the **Find** feature in the **Files** navigation pane and check the box **Show Only My Files**. To choose the lawyer(s) whose files you wish to see, click on **Select Lawyers**. Highlight the name(s) from the **Available Lawyers**, press **Add** to select lawyer(s) and click **OK**. You will now only see the files of the selected lawyers. To return to the full file list, deselect **Show Only My Files**.

### 15. QUESTION

I need to create a letter. How do I access the letters menu?

#### ANSWER

You can either click on the **Letters** navigation bar or press **F3** to open the letter templates.

### 16. QUESTION

I need to create court forms. How do I access the court forms menu?

#### ANSWER

You can either click on the **Court Forms** navigation bar or press **F4** to open the court forms templates.

### 17. QUESTION

How can I locate a specific court document without having to look through all of the templates?

#### ANSWER

Either click on the **Court Forms** navigation bar or press **F4** to open the court forms templates. Locate the **Find** feature, click on **Search for** and enter the name of the court form (or the form number) required. The court form list will be filtered to display only those templates which contain the search criteria.

### 18. QUESTION

My file is closed. How can I remove it from my file list without deleting the file?

#### ANSWER

All files can be archived without being deleted. In the **All** Files tab, highlight the file then select **Archive** on the **File Tasks** navigation pane. The file will be stored in an archived database. Only your ACL Administrator can access the archived files if a file needs to be reactivated.

### 19. QUESTION

How do I create a file in Small Claims?

**ANSWER**

In the **All Files** tab, click **Create New** in the **Files** navigation pane. In the **File Details** section under **File Information**, select **File Type** and choose **Small Claims** from the menu.