

FAQs (ACL5)

FILE MANAGEMENT - CREATING/EDITING/COPYING/ARCHIVING

1. How do I create a new file?

On the **Files** page, select **Create**. Enter the information for the file in the **File Details** section.

Note - any fields containing an asterisk (*) must be completed. Once the required fields are complete, select the **Parties** page from the menu on the left and add the required details.

2. I do not have an internal file number yet. Do I need to have one to create my file?

No, you do not need a file number to create a new file. Leave the **Firm File Number** field blank and ACL will assign its own File ID. You can add your File Number another time by editing your file.

NOTE: If your firm is integrated with your accounting or other system, you will likely require a file number before you can proceed with the file opening in ACL. If you don't yet have the file number, you can choose a general/miscellaneous file number that exists at your firm and then edit the ACL file later to add the correct file number.

3. How do I create a Small Claims file?

In the Files list, select **Create** from the menu on the left. In the File Information section, locate **the File Type** field and select **Small Claims**. Complete the remaining details and party information for the file.

NOTE: The only visible court form templates for Small Claims files are the Small Claims forms, Repair and Storage Lien Act forms, and the three Construction Act forms pertaining to Small Claims.

4. How do I edit or select a file?

On the **Files** page, to select an existing file, use the **Search** bar at the top by entering part of the file name or number. The file list will filter to display only those files which contain the search criteria. To edit the file, select **Edit** from the menu on the left, or simply press the **Enter** key to open the file for editing.

5. How does the Copy feature work?

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.

NOTE: There is an additional license fee for creating a Copy of a file.

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

Yes. In the **Files** list, navigate to the filter feature above the column headings which reads **Show all files**. Click on the drop-down and select **Show only my files**, then select the required lawyer(s) from the available list. To return to the full list, click on the drop-down again and select **Show all files**.

7. My proceeding type has changed. How do I edit my file to reflect this and what happens to the original file?

On the **Files** page, select your file and double-click it to open for editing. From the menu on the left choose **File Details**. Select the appropriate **File Type** and **Proceeding Type** from the drop-downs. You will be given an alert that you may need to refresh or update other pages in the file – click OK. The **Save** icon in the top right becomes **Save As** giving you the option to save the new proceeding as a new file or overwrite the original file. There is no additional license fee to save as a new file.

8. My file is closed. Is there a way to remove it from the Files list without deleting it permanently?

Yes. All files can be archived without being deleted. From the **Files** list, highlight the file you wish to archive (remove from the Files list). Select **Archive** from the menu on the left. The file will then be removed and stored in an archived file database. Only your ACL Administrator can access the archived files database if a file needs to be re-activated.

FILE INFORMATION

9. Is there a way to see a quick view of the notes and list of parties on my file?

Highlight the file in the **Files** list. At the bottom of the window there are options for **File Notes** and **File Preview**.

10. I need to create a document which contains all the party information on my file. Is there something in ACL that I can use?

Yes. On the **Files** page, highlight the file for which you need the information then select the tab **File Information and Reports** at the bottom of the window. Select a template from the folder **File Information Sheets**.

MANAGING OPPOSING PARTY REPRESENTATION

11. I have entered a party on my file who is self-represented, but they have since retained counsel. How do I change the party's representation?

On the **Files** page, double-click on the file you wish to edit. Select **Parties** from the menu on the left and highlight the party you wish to edit. Select **Change representation** from the menu on the left (or right-click the party) and choose the option **To other lawyer**. Complete details as necessary.

12. I have a party who's represented by counsel, but they now have new counsel. How do I change the party's representation to show this?

On the **Files** page, select your file and double-click it to open for editing. From the menu on the left, select **Parties** and highlight the party you wish to edit. Choose **Change Representation** from the menu on the left (or right-click the party) and select **To other lawyer**. Complete details as necessary.

13. I added a self-represented party on my file, but they are now being represented by a firm who is representing other opposing parties on my file. How do I add this party to that firm?

In the Parties list, highlight the self-represented party and right-click. Select **Change Representation** then select **To other Lawyer**. Select the firm from the drop-down – the self-represented party will now appear as one of the represented parties of that firm.

14. I have 2 opposing parties on my file who are represented by the same law firm, but by 2 different lawyers at that firm. Is it possible to add the opposing law firm twice so that each opposing party can be added with their own specific lawyer at the same firm?

Yes, it is possible to add the same opposing law firm twice for this type of scenario. For detailed instructions, please see our Tip Sheet "**Adding Multiple Entries for Same Opposing Law Firm**".

MANAGING PARTY DETAILS/ROLES

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

Locate the file in the **Files** list and double-click on it to open for editing. From the menu on the left, select **Document Previews**, then select **Lawyers** for from the drop-down. Select the party you need to edit and choose the correct role from the drop-down menu.

NOTE: You may need to refresh all of the **Document Previews** in order for the role change to be reflected throughout the file.

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

On the **Files** page, double-click on the file you wish to edit. From the menu on the left, select **Parties**. Highlight the party you need to edit, choose **Edit** from the menu, and make the required changes.

NOTE: You may need to refresh all of the **Document Previews** in order for the spelling changes to be reflected throughout the file.

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

There are two ways to update client information.

Locate a file in the **Files** list in which the client is a party and double-click it to open for editing. From the menu on the left, select **Parties**, highlight your client and select **Edit** from the menu on the left. Once the changes are made, you will be alerted that all other files linked to this client will be updated. Click **Yes** and the changes will be saved in the database.

OR

From the **Admin** menu at the top, left, select **Data → Clients and Contacts**. Locate the client and open the profile for editing. Make the required changes and save accordingly.

MANAGING OPPOSING LAW FIRMS

18. I just learned about an address change for a law firm that's contained in the opposing Law Firm database in ACL. How do I update that database with the new address?

If you are aware of changes to a law firm, please advise ACL Support. In the meantime, there are two ways to change opposing law firm information in the database yourself.

Locate the file for which the firm has been added as opposing counsel and double-click to open it for editing. Open the **Parties** page, highlight a party who is represented by the law firm and select **Edit** from the menu on the left. The opposing firm's details will be displayed at the top, right side – click on the **edit firm** icon beside it. Make the required changes and click **OK**. You will receive an alert to notify you that all files linked to that law firm will be updated. Click **Yes** so that the changes will then be saved into the opposing Law Firm Database.

NOTE: You may need to refresh all of the Document Previews in order for the change to be reflected throughout the file.

OR

From the **Admin** menu at the top, left, select **Data → Other Law Firms**. Locate the opposing firm and open it for editing. Make the required changes and save accordingly.

MANAGING DOCUMENT PREVIEWS

19. Can I edit my Re-lines?

Yes. Locate the file in the **Files** list and double-click it to open for editing. From the menu on the left, select **Document Previews** and then choose **Re-line for our Parties OR Re-line for opposing parties**. Make the required changes to one or both re-lines, as required and click the **Save** button in the top right of the screen.

20. How can I edit my Title of Proceedings?

Locate the file in the **Files** list and double-click it to open for editing. From the menu on the left, select **Document Previews** and then choose **Title of Proceedings**. If the preview is “locked” (which happens after the first court form has been assembled), you will need to “**Unlock the preview**” in order to make edits. You can then make any manual edits or use the formatting toolbar at the top of the screen.

NOTE: Spelling or grammar changes to a party’s details must be made by editing the party’s details directly. If you need to change the order in which the parties appear, click on **Order Parties** on the left and move them accordingly.

21. How can I edit my Backpage?

Locate the file in the **Files** list and double-click it to open for editing. From the menu on the left, select **Document Previews** and then choose **Backpage**. If the preview is “locked” (which happens after the first court form has been assembled), you will need to “**Unlock the preview**” in order to make edits. You can then make any manual edits or use the formatting toolbar at the top of the screen.

NOTE: Spelling or grammar changes to a party’s details must be made by editing the party’s details directly.

CREATING LETTERS AND COURT FORMS

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

In the **Files** list, ensure the file for which you need a letter is highlighted. Click on **Correspondence** at the bottom of the screen. The letter templates will use the information from the highlighted file.

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

In the **Files** list, ensure the file for which you need court forms is highlighted. Click on **Court Forms** at the bottom of the screen. The court form templates will use the information from the highlighted file.

24. Can I assemble more than one document at a time?

Multiple documents can be assembled at the same time by highlighting the various templates (**CTRL + left-click** to select) then select **Generate** on the left of the window.

25. How can I locate a specific court document without having to search through all the templates?

Select **Court Forms** from the menu at the bottom of the screen. In the Court Forms folder, navigate to the **Search** field at the top of the screen. Begin typing the name of the court form or the form number. As you type, the list of forms will begin to sort and filter to display only those templates which contain the search criteria.

26. Is there a way to add my own precedent letters and forms?

Speak with your ACL Administrator about adding your precedents to ACL. They will then make a request to our development team to create the new templates.

27. How do I change Provincial jurisdictions to access other court forms?

Locate the file in the **Files** list, right click on it and select **change jurisdiction**. Once the province is changed, you will no longer see the file in the Files list because it has been re-located to the Files list of the newly selected province. Select the other province from the drop-down menu at the top of the Files List.

MANAGING FIRM DETAILS

28. Why does my lawyer's middle initial in their name not appear on the court forms?

Check with your ACL Administrator that the name has been correctly added to ACL in the lawyer's profile. Once changes have been made, refresh the document previews for the **Service Details** and **Backpage** – this will pull in the correct name of the lawyer, as entered by ACL Administrator in the Firm's Settings.

29. My name is spelled wrong in the Affidavit of Service. How do I correct this permanently?

Advise your ACL Administrator about the misspelling. They can correct this in the firm's settings in ACL.