



xchangedocs

Frequently Asked Questions

Do I need ACL in order to use xchangedocs?

No - **xchange**docs can be used as a stand-alone document sharing platform.

Does xchangedocs work with my current version of ACL?

Most likely you will need an upgrade to the latest version of ACL5. The minimum ACL system requirements are ACL5.1 and Content Version 2.4.262.0 or greater.

Do shared documents stay on xchangedocs forever?

At this time, shared documents remain in **xchange**docs until the "sender" removes them, which may be done at any time.

Where is the data stored? Canada?

The data is stored in Canada.

What is the difference between a Premium User and a Standard User?

ACL users are, by definition, **Premium xchangedocs users**, which allows them to initiate sharing of documents on any new or existing file to any outside user. They may also choose who amongst the users at their firm are participants in the document sharing for a specific file. Non-ACL users can also register for Premium access using the xchangedocs web client.

A **Standard User** can (using the **xchange**docs web client) download documents shared with them by a Premium user, within the context of the Premium user's file reference. They can also as share back their own documents on the same file. They cannot initiate their own new files, nor add their own additional participants.

What is classifying a document and how is that done?

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. If the matter doesn't exist, it can be created at that time, and then the document can be classified. When classifying is completed the first time, all further documents exchanged on the specific matter will automatically be classified to that Matter/File.

How do I send or share a document?

Highlight the file/matter, select the **xchangedocs** tab at the bottom of the screen, then click **Upload & Share**. Select the files(s) to be shared and choose the recipient (recipients must either be a party or a contact on the matter, with an email address on the file). Click **Upload & Share Document**.

When sharing a document, there are two Notification Methods to choose from – what's the difference between them?

Automated email notification is a pre-worded template that is generated from the system and does not change. The **Personalized email** notification will open a new email message where additional details can be added to the intended recipient. A **Personalized email** will be sent from the sender's own email address.

What is revoking a document and how does that work?

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.

I've made changes to a document I shared – how do I share the new version?

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**.

How do I know if someone has downloaded the document I shared?

In the **xchangedocs** tab, locate the document and note the colour of the icon on the left side – if the top triangle is light blue, then the document has been downloaded by a recipient. Additionally, when you scroll your cursor over this icon, more information will be presented indicating the status of the document shared. 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).

What is an Activity Log?

The **Activity Log** is a history or audit record 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/matter. 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.

What do the changing icon colours mean?

When users share documents, the triangles on the left will be dark blue on the bottom and grey on the top. If a recipient of the document share then downloads the document, the top icon will turn light blue.

When users receive a document, the triangles icon on the left will be green on the bottom and grey on the top. If the user then downloads the received document, the top triangle will turn green.

How can I create an audit report?

The history of a document share is accessed by highlighting the document and selecting the menu on the right. Select **Activity Log** from the menu.

How do I create a Record of Service?

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.