



Legal Kiosk™ v3.0



Internal User Guide



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Overview

The Legal Kiosk™ is a document sharing software application designed to allow specific files or documents to be shared with your internal staff, clients, or anyone with authorized access to view them. Files are arranged by practice area and shared documents are specific to each file within a practice area. Documents can be government forms, contracts, agreements, resolutions, share certificates, work plans, firm accounts, correspondence, financial documents etc. Essentially, any draft, final or executed document can be shared using the Legal Kiosk™. Sharing documents using the Legal Kiosk™ is faster and more secure than sending documents by email and allows you to remain in control.



Legal Kiosk™ Admin Management

Any user account at Administrator level has access to the Admin Management area, which consists of three sections: User Access, My Legal Kiosk™ Management, and Practice Area Management.



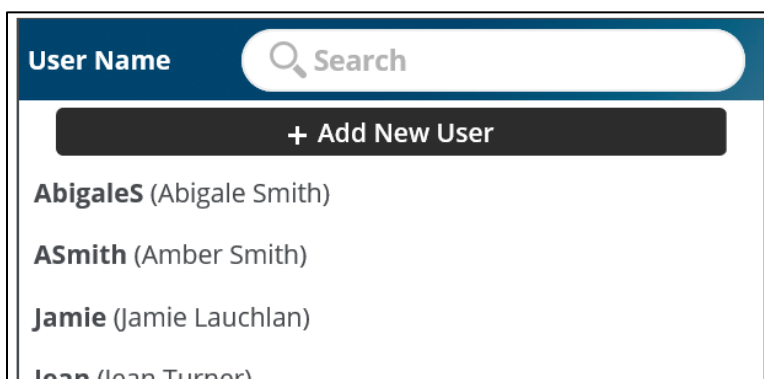
User Access Section

The User access section is used to create user accounts and manage access rights to files and documents.

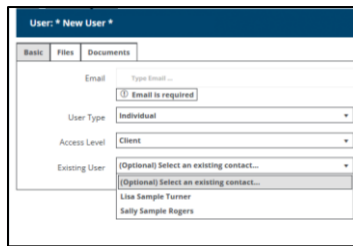
Adding a New User

If you would like to grant access to the Legal Kiosk™ to someone, you will need to create a User Account for that person. This is a two-step process using email verification, and is the same for both internal and external users.

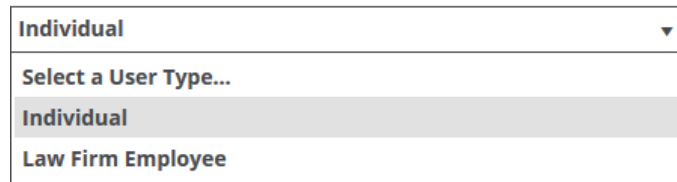
In the User name section, click the **+ Add New User** button



The **User: *New User*** form now appears – this consists of three tabs – Basic, Files, and Documents.



1. On the **Basic** tab, enter the email address and select the **User Type** from the dropdown



There are two types:

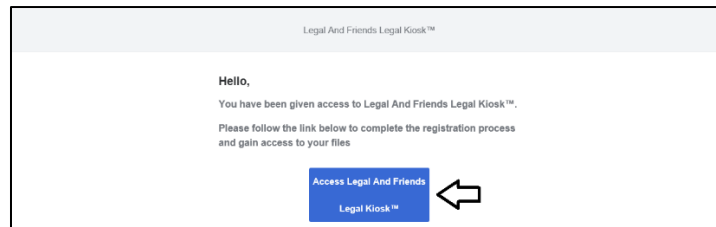
- (a) **Law Firm Employee** – an internal user, such as a member of the firm
- (b) **Individual** – an external user, such as a client or accountant

2. Select the **Access Level** for the user

Individual Access Level	Law Firm Employee Access Levels
Client	Administrators
Select group...	Select group...
Client	Administrators
	Read-Only (Internal)

- (a) For Law Firm Employees, two choices are available:
 - **Administrators**
 - Administrators can add users, files, documents, contacts, and also change aspects of the Legal Kiosk™ configuration itself, as well as being granted access to all files/documents (unless specifically denied access to a file or document).
 - **Read-Only (Internal)**
 - Users have access to ONLY view all files/documents and contacts by default
- (b) For Individuals, there is only one choice – Client. This allows that user to view only the files/documents they have been specifically granted access to.
 - To grant such access, click the **Files** or **Documents** tab to grant access to a file, or to specific documents as explained in [Granting Access to Files and Documents](#)

3. The user will receive a welcome email with instructions on how to complete the registration process.



(a) When they click the blue access button, they will be taken to the Registration Page:

They will then be able to create their own Username and Password, as well as fill in First, Middle, Last name and Address. The Contact is created automatically by this registration process. If the individual does exist as a contact in Legal Kiosk™, they will only have to create their User Name and Password.


- (b) Check the **I Accept** box and click **Register**
- (c) The user's browser then opens the firm's Legal Kiosk™ Login Page, where Username and Password can be entered.

If file or document access was not granted during the initial setup process, the process of granting access to files and documents can be continued in the **Admin Management** Tab. The new user will be visible in the **User Name** column.



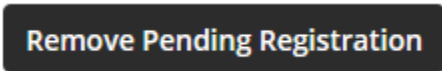
Resending a Registration

Click on the email address associated with the registration (pending or expired). Once the user page appears displaying the Pending User details, you can change the mail address and/or simply resend by clicking **Resend Registration** at the bottom right of the screen.



Removing a Registration Expired User

Click on the email address associated with the expired registration. Once the user page appears displaying the Pending User details, click **Remove Pending Registration** at the bottom right of the screen.



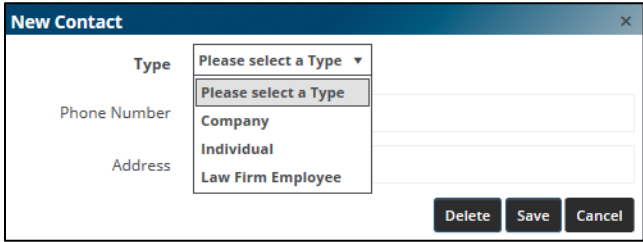
Deleting a User

Select the User to be deleted in the Admin Management>User Access section. In the User Name and when the Contact Information window opens, click **Delete**. Note that Users and Contacts are independent of each other and must be deleted from each area individually.

Adding a New Contact

Note: This section is reserved for future features and creating the contact in this manner will not start the registration process or generate any email notification.

New Contacts can be added in the Contact Section for reference purposes, however, until they are added as a New User as set out above, they will have no access to Legal Kiosk™ files.



There are three types available:

- (a) **Individual** – an external user, such as a client or accountant
- (b) **Law Firm Employee** – an internal user, such as a member of the firm
- (c) **Company** – has no Legal Kiosk™ functionality beyond reference. This feature will be activated in a future version of Legal Kiosk™



1. Select the contact type for the proper information fields

2. Enter the necessary information

Deleting a Contact

Select the Contact to be deleted on the Contact List and when the Contact Information window opens, click **Delete**. *Note that Contacts and Users are independent of each other and must be deleted from each area individually.*

Granting Access to Files and Documents

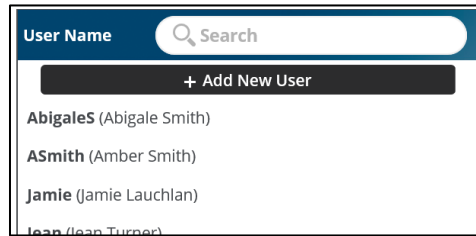
Law Firm Employees have access to ALL files and associated documents by default. For most firms, once Access Level has been set for firm users, all setup is complete and you can click the **Save** button at the bottom right-hand corner of the screen.

Individual users have NO default access to any file or document. Each Individual user will need to have file/document access specifically granted. This can also be done during the initial setup of the Individual.

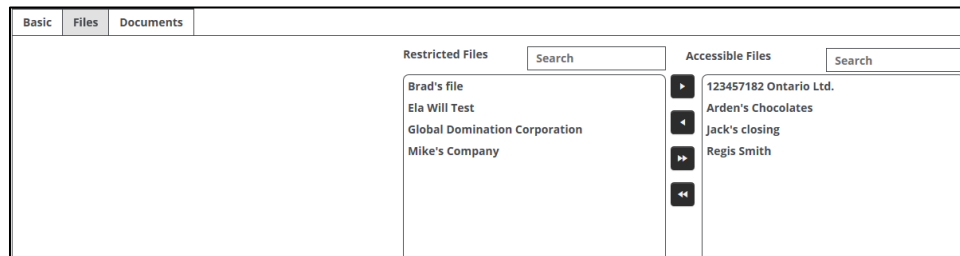
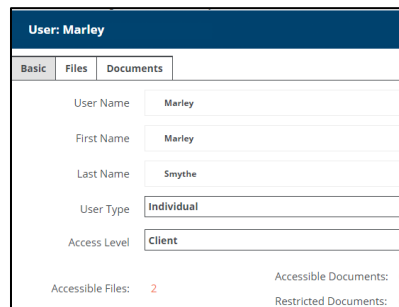
All types of permissions start from the **Admin Management > User Access** screen



To a Specific User (One User to Many Files)



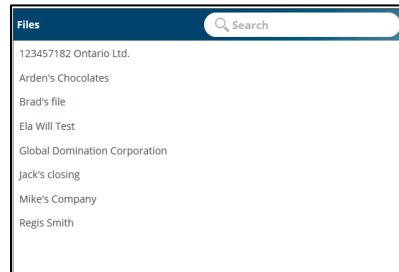
1. Click on the user name you wish to assign a file to and then click on the **Files** tab



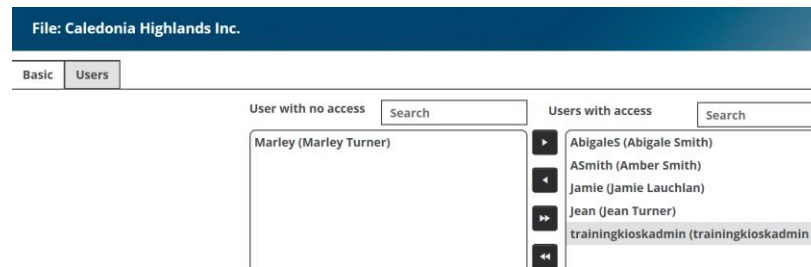
2. Two columns detail the following:
 - (a) **Restricted Files** – files in the Legal Kiosk™ this user does NOT have access to
 - (b) **Accessible Files** – files the user has access to
3. Select the file you wish to grant/remove access for and click the appropriate arrow button. The double arrow button will add/remove all files in the column.
4. Click **Save**



For a Specific File (One File to Many Users)



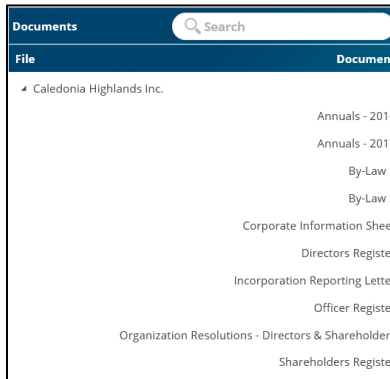
1. Click on the file name you wish to allow access to and then click on the **Users** tab



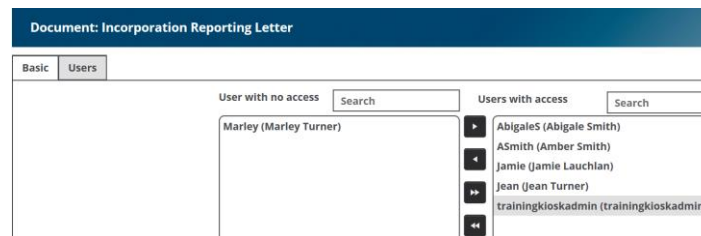
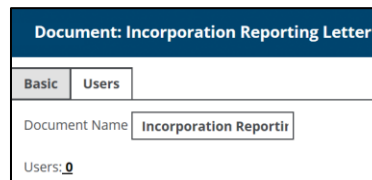
2. Two columns detail the following:
 - (a) **Users with no access** – users who do NOT have access to the file
 - (b) **Users with access** – users that have access to the file
3. Select the user you wish to grant/remove access for and click the appropriate arrow button. The double arrow button will add/remove all files in the column.
4. Click **Save**



To a Specific Document



1. Click on the document name you wish to allow access to and then click on the **Users** tab

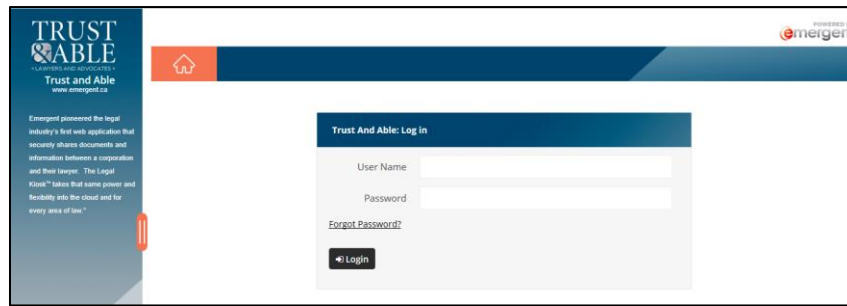


2. Two columns detail the following:
 - (a) **Users with no access** – users who do NOT have access to the document
 - (b) **Users with access** – users that have access to the document
3. Select the user you wish to grant/remove access for and click the appropriate arrow button
4. Click **Save**

Logging in to the Legal Kiosk™

To login to the Legal Kiosk™, open a web browser on your PC, laptop, tablet or smart phone and navigate to your firm's Legal Kiosk™ site.

At the Login Page enter your User Name and Password and click **Login**



Home Page

After logging in, the Home page will appear, displaying a list of “practice areas” (areas of law) the firm has made available in the Legal Kiosk™:



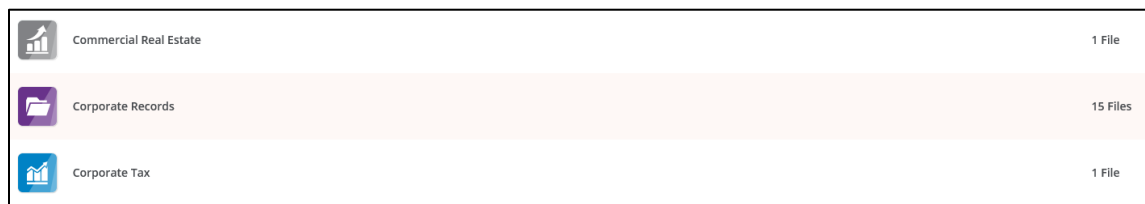
To return to the Home page, click the Home icon located in the top left-hand corner of the Legal Kiosk™ page



To logout of the Legal Kiosk™ click the Logout icon located in the top right-hand corner of the Legal Kiosk™ page

Viewing Files

To select a Practice Area, click on the row – the area will appear highlighted as you hover over it, and the number of files within each Practice Area is displayed on the right. The All Files practice area contains the files across all practice areas that the user has access to.



You will now see a list of files within the selected practice area. The number of documents within each file is displayed on the right.



Click on the name of the file, or type the name you are searching for in the Search Files box – this will then display only the files that match your search criteria. On the immediate left of the document count for each file are two icons:



Click on the download icon to download a PDF copy of the entire book as a single file called Virtual Minute Book.pdf.



Click on this icon to EDIT or DELETE the file (Internal Administrative users only. This option is never available to Read Only or Client Users)

Add File


Click this button to add a NEW file within the practice area

Sort By: Name

Click the **Sort By:** button to change the sort order of the files:

- [Name](#)
- [Document Count](#)
- [Effective Date](#)

- Select Name to sort by name (default)
- Document Count - sorts files by the number of documents
- Effective Date – sorts by the most recent effective date of documents in the file

Click the  button to choose ascending or descending sort order within a Sort By: option

Search Files

Enter a search parameter in this box to search for the file you want without scrolling through a long list

Viewing Contacts (Internal Users only)

The Legal Kiosk™ allows you to create and maintain Contacts using the Contact Icon.

Names	User Name	Email	Phone Number	Contact Type	Address
Arthur Attorney		arthur@trustandable.com	(403) 298-2400	Law Firm Employee	15-7895 Trannere Drive, Mississauga, ON L5S 1V9
Brad Elliot Pitt	Brad	dcooper@emergent.ca	(416) 232-9867	Individual	1012 River Street, Ottawa, ON M2M 2M2
Danielle Young	dyoung	dyoung@emergenttech.ca		Law Firm Employee	15-7895 Trannere Drive, Mississauga, ON L5S 1V9




Sort By: Name ▾


- [Name](#)
- [User Name](#)
- [Type](#)
- [Phone Number](#)
- [Address](#)
- [Email](#)

Click the **Sort By:** button to change the sort order of the files:

- Select Name to sort by name (default)
- User Name – sorts files by Contact’s user name (if applicable)
- Type – sorts by Contact type (i.e. Law Firm Employee)
- Phone Number
- Address
- Email

Click the  button to choose ascending or descending sort order within a Sort By: option

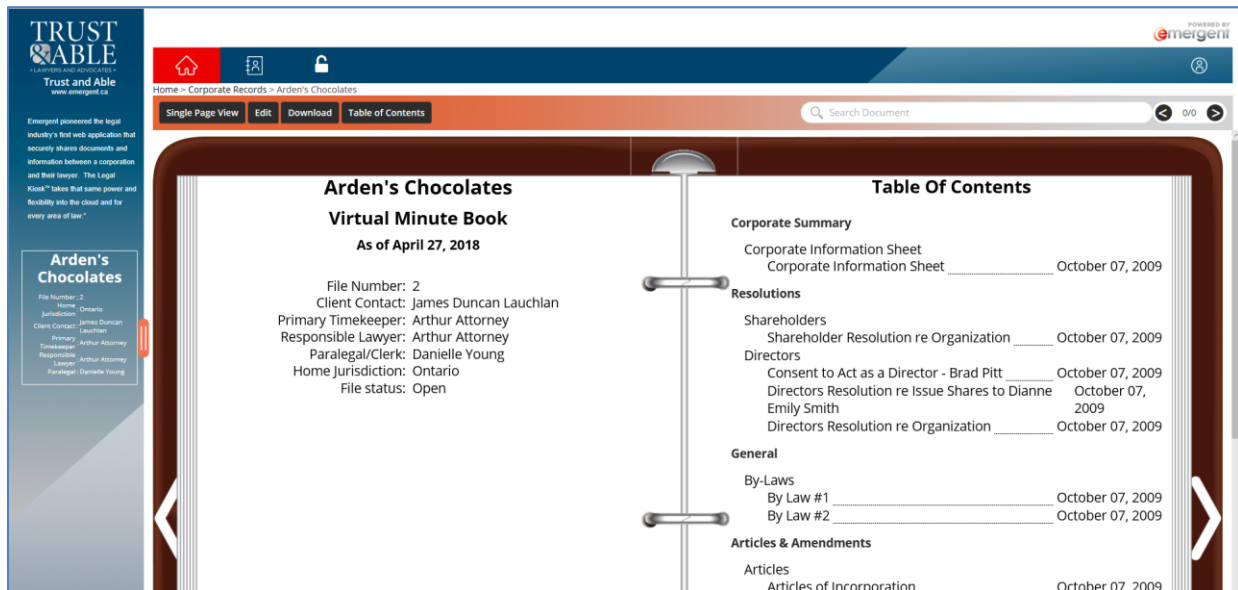
Enter a search parameter in this box to search for the contact(s) you want without scrolling through the entire list

 Add New Contact

Click this button to add a NEW contact

Viewing eBooks

Once a file has been selected, the file will open to a two-page “book view” of the eBook. The example below shows the Virtual Minute Book for a Corporate file:



On the left-hand side is the cover page, containing file details such as File/Matter Number, Home Jurisdiction, Client Contact, Primary Timekeeper, Responsible Lawyer, and Clerk/Paralegal. The right-hand side of the page displays the Table of Contents.



eBook Menu

Single Page View

Click this button to switch between the default two-page **Book View** and a vertically scrolling **Single Page View**.

Book View

The label on the button will always show the view NOT selected at the present time.

Edit

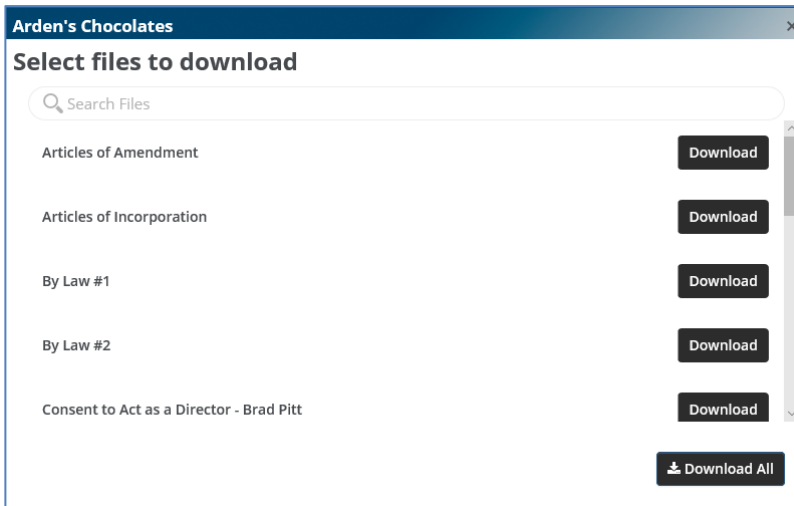
If your User account has Administrator rights, the Edit button is available and allows you to edit file details, add/remove documents, or delete a file.



Enter a search parameter in this box to search for a file.

Download

Click the **Download** button to download any document within the file, or all documents as a single "book".



Click the **Download** button to download a PDF copy of the corresponding single document.

Click the **Download All** button to download all documents as a complete eBook – complete with cover page, Table of Contents, and section dividers.

Table of Contents

The Table of Contents lists each section and subsection of the eBook. Under each subsection you will see the added documents. To the right of each document you will see the **Effective Date**.

To open a specific document, hover over the document name (it will appear highlighted) and click – in this example, the Directors' Register has been selected:

Table Of Contents	
Corporate Summary	
Corporate Information Sheet	
Corporate Information Sheet	February 08, 2018
Ledgers & Registers	
Shareholders' Register General	
Shareholders' Register	February 08, 2018
Directors' Register	February 08, 2018
Officers' Register	February 08, 2018
Officers' Register	February 08, 2018

Director	Address	Elected	Resigned
Brad Pitt	1012 River street Ottawa, ON M2M 2M2	Jun 5, 2014	Feb 27, 2017

Creating and Editing Files

To create a NEW file:

1. Select the practice area (the following example uses Corporate Records)
2. Click **+Add File**
3. The **New File** form will appear:

New File

Basic Documents (Save File)

File Details

File Name

File/Matter Number

Client Number

Home Jurisdiction

File Status

Default Document No documents to select.

Contacts

Primary TimeKeeper Paralegal/Clerk

Responsible Lawyer Client Contact

Cancel Save

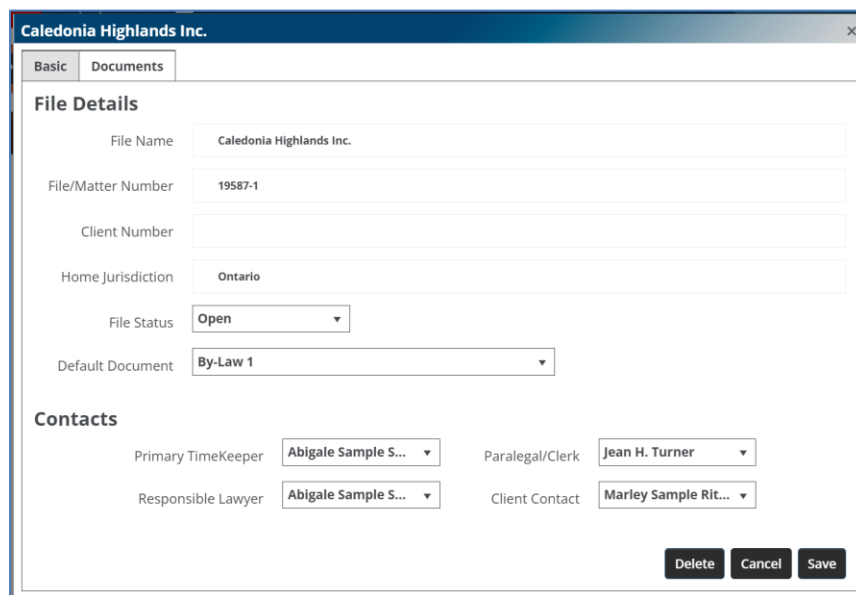
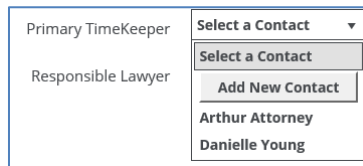
Basic Tab

The **Basic** tab is active – the Documents tab is initially greyed out since documents cannot be added until the file has been created.

Note: The *only* required fields are File Name and File Number



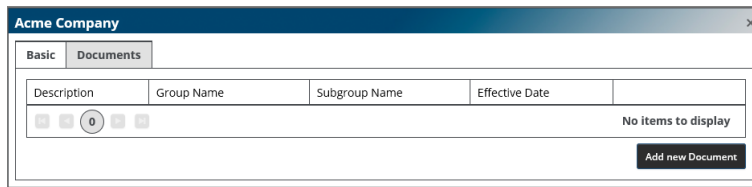
File Name	Text field
File/Matter Number	Text field
Client Number	Text field
File Status	Dropdown with two options – Open or Closed. Open files can be viewed by any User (assuming required access rights). Closed files can only be viewed by Internal Users (Law Firm Employee)
Home Jurisdiction	Text field
Primary Timekeeper	Select an existing Contact or create one
Responsible Lawyer	Select an existing Contact or create one
Paralegal/Clerk	Select an existing Contact or create one
Client Contact	Select an existing Contact or create one



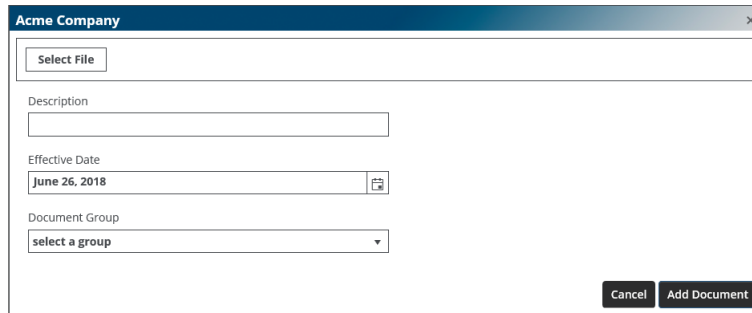
Click **Save** to create the file. If you decide you do not wish to create this file, click **Cancel**.

Documents Tab

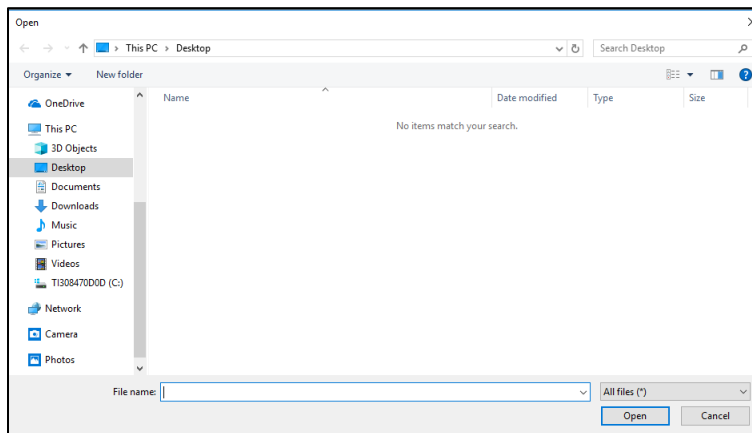
The Documents tab opens directly after saving the newly created file. You can now add documents to the file.



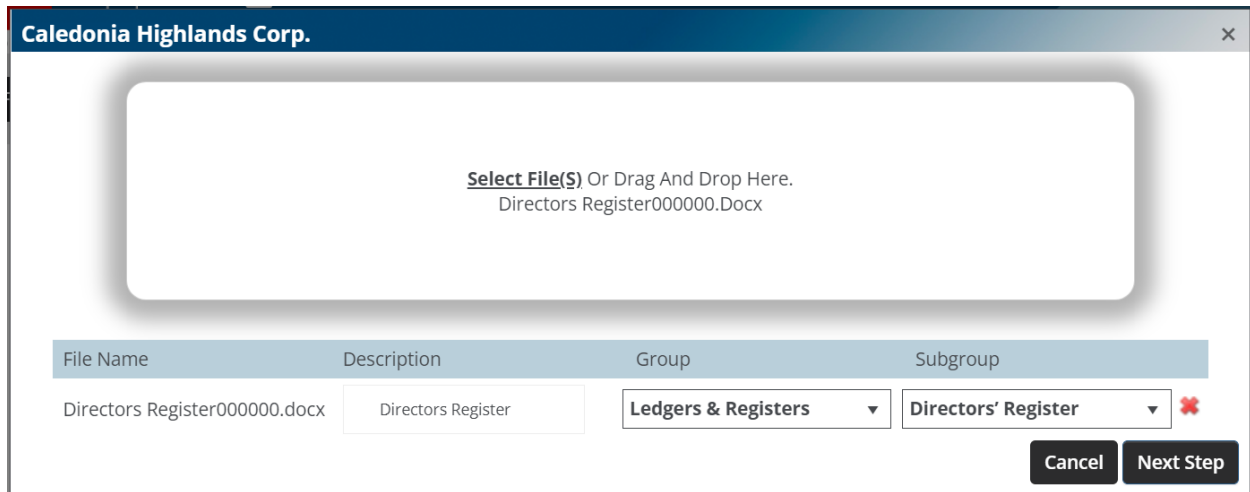
1. Click **Add new Document** – the following form appears:



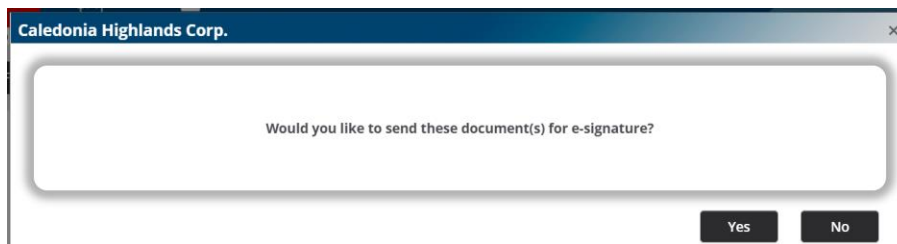
2. Click **Select File**



3. Navigate to the location of the document you wish to add. Select the document(s) and double-click to select or click **Open**.



4. Now enter the **Description**, and select the **Group** and **Subgroup** using the dropdowns. These are required fields and if one is not entered, the document will not be saved to the file and not appear as a link in the Table of Contents.
5. Click **Next Step** to add the document to the file.
6. Click **No** to add the document to the Minute Book with no further steps necessary.



7. The document will now appear in the Table of Contents and can be viewed. Click **Cancel** if you decide not to.
8. Click **Yes** if the documents are to be sent for signature using DocuSign.

Deleting a File

If this file is no longer needed in Legal Kiosk, click **Delete** and the file, together with all uploaded documents, will be deleted from Legal Kiosk

DocuSign

Note: It is not recommended to add New Users through DocuSign. Add New Users as set out above to start the registration process. Document Recipients must complete the registration process before accessing documents.

1. Enter the **Effective Date** and click **Next Step**.



The screenshot shows a window titled "Caledonia Highlands Corp." with a table of documents. The table has columns for File Name, Description, and Effective Date. One document is listed: "Directors Register000000.docx" with description "Directors Register" and effective date "8/10/2021". There is a checkbox for "When document is signed" which is unchecked. "Cancel" and "Next Step" buttons are at the bottom right.

- At this point, the standard Email Subject and Body can be used or modified. Select the Recipient using the dropdown. Use the **Add Recipient** button if the documents are being signed by more than one person. The order of names can be changed by dragging the handle to reorder. Checking the **Sign in this order** tickbox will send the notification emails in that order.

Note: All Contacts in Legal Kiosk are available in the dropdown. If the wrong contact is selected, they will have access to the document, but not the related file.

- Select the Signing Requirements. **Receives a Copy** will send the email with a link to review the document, but there are no signature areas.

The screenshot shows a window titled "Caledonia Highlands Inc." for configuring an email. It includes fields for "Email Subject" and "Email Body". Below is a "RECIPIENTS" table with columns for Contact Name, Email, and Signing Requirements. There are four recipients listed: Marley Sample Ritchie, J H Ritchie, Tim Turner, and Jean H. Turner. The "Sign in this order" checkbox is checked. "Add Recipient", "Cancel", and "Submit To DocuSign" buttons are at the bottom.

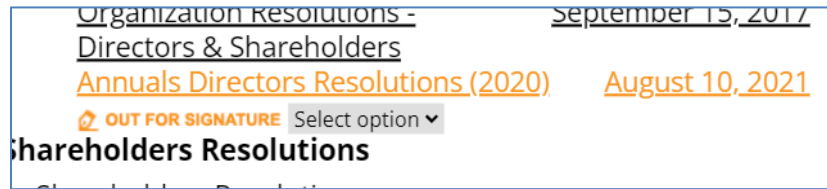
- Using the Name dropdown, select the contact name and drag to the signature location

The screenshot shows a document with a signature block. On the left is a "Search Fields" panel with "Standard Fields" including Signature, Initial, Date Signed, Name, Email, Company, Title, and Text. The document text reads: "The undersigned, being all the directors of the Corporation, hereby consent to and approve foregoing resolutions in accordance with the provisions of the Business Corporations Act (Ontario). DATED the 30th day of August, 2020." Below the text are signature lines for Joseph Sample Ritchie, Davey Sample (Name) Jones, and Albert Sample Smith. Each line has a "Sign" button with a downward arrow.

- Once all the signatures are set, reminders, etc. can be set using the **Actions** button and then click **Send**.

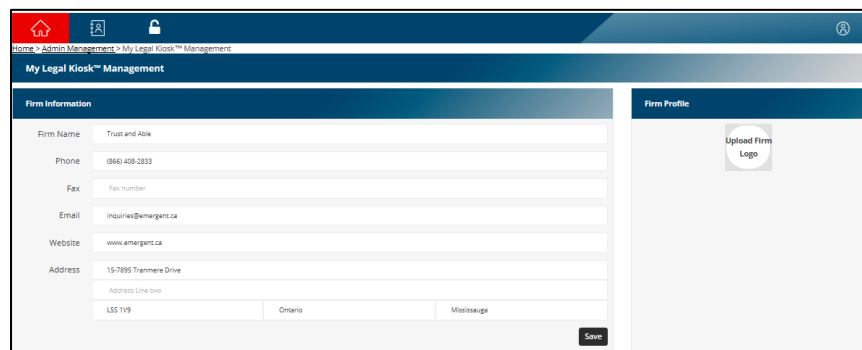


6. The document will appear in the Minute Book Table of Contents as in yellow.



7. The **Select option** button will allow you to void or resend the DocuSign envelope, and clicking history will show the activity on the envelope.

My Legal Kiosk™ Management



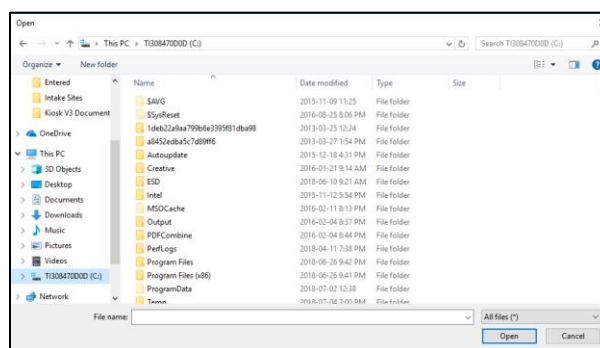
Firm Information

This area contains the firm information that appears on the cover and back pages of eBooks, and also on the side bar. In most cases this information is entered when your Legal Kiosk™ site is created. To change any of the information, update the field and click **Save**.

Firm Profile

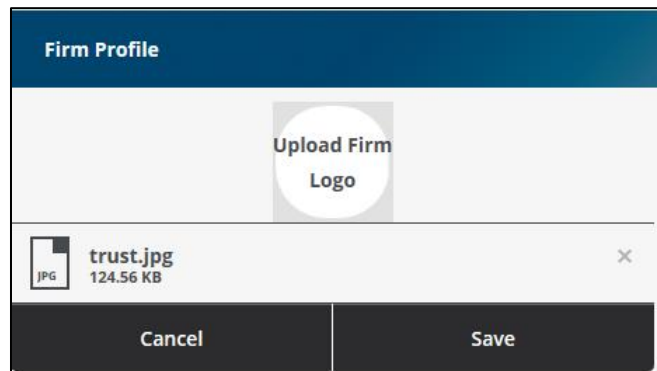
This allows you to add/change a firm logo to the top of Legal Kiosk™ sidebar.

1. Click the **Upload Firm Logo**





2. Navigate to the location of the image file you wish to add. Select the file and then click **Open**.

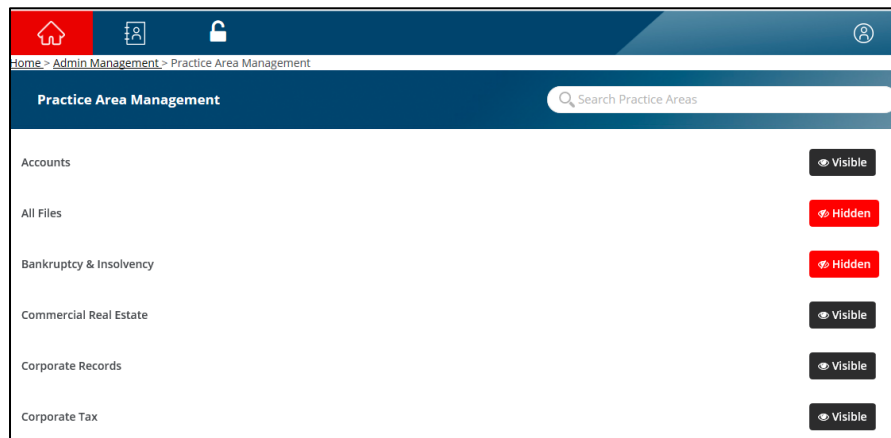


3. Click **Save** to make the change.

Note: Changes to the firm information cannot be undone.

Practice Area Management

By default, all Practice Areas in the Legal Kiosk™ are Visible. To Hide any Practice Area, click the button on the far right by the practice area you wish to hide – the practice area will then say Hidden and will no longer be visible in the Legal Kiosk™.



Note: Files and associated documents under any Hidden practice area will also be hidden