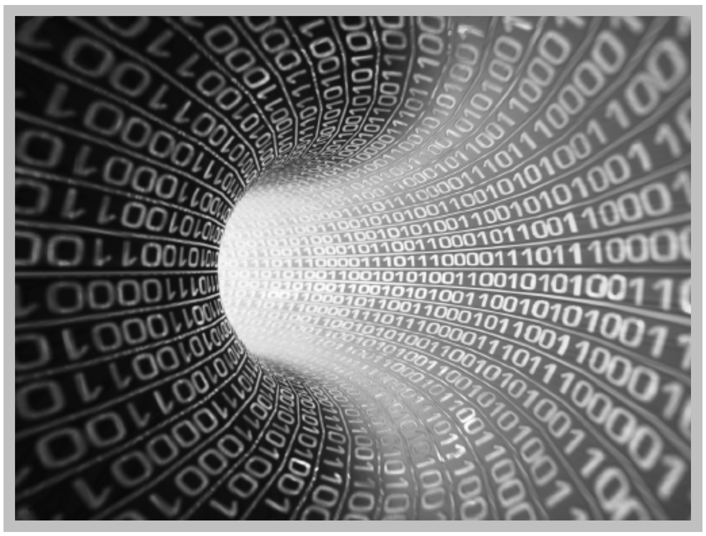
ConsciousCMS2
Implementation Guide

Legal Vault Module



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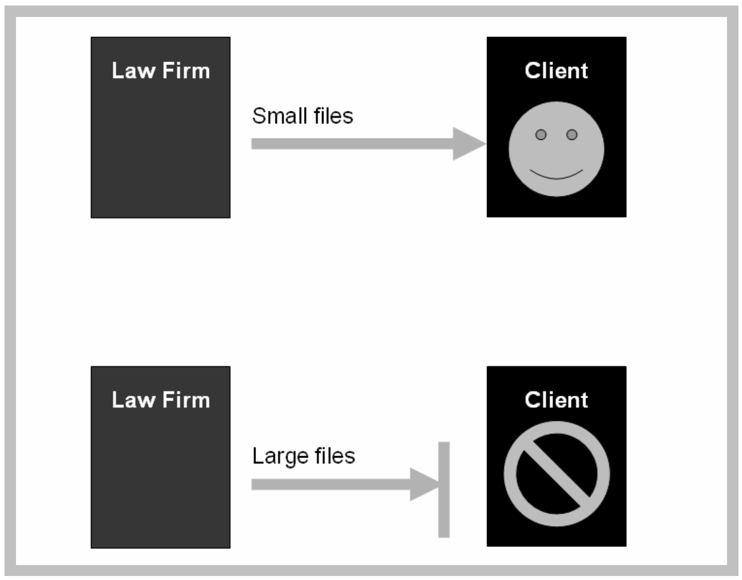
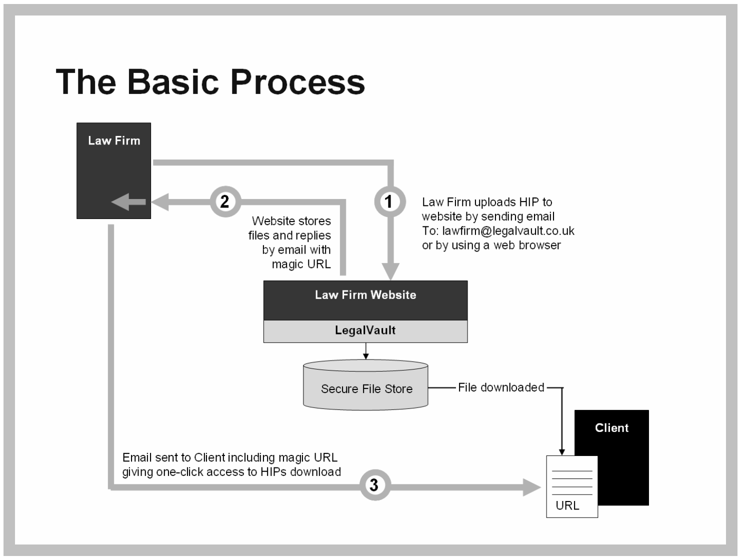
Introduction

The Legal Vault module is designed to solve the problem of how to provide clients with access to very large files (usually HIPS in PDF format) - the problem being that large files are almost always blocked by mail servers.

Legal Vault has been developed as a direct result of real-world problems experienced by our existing clients when trying to email large HIPs files in PDF format to agents and clients.



LegalVault utilizes your website to store large client files (such as HIPs). You contact the Client by email in the normal way but rather than attaching large files to your email you give them a link to the files (stored on your website)



- Email based means little impact on existing processes: to upload files to LegalVault you simply email the files to the website (rather than directly to the Client)
- The website stores the files in a secure client folder and replies to your email with a “magic URL” that you can forward to your Client
- The Client receives your email and clicks on the URL to download the file
- Alternatively, you can give them the magic URL over the phone
- There is a web interface in case you prefer to upload the files without using email.
- Files can easily be updated via email (or via web interface)
- You can have multiple files in each folder
- An email alert (optional) is sent when the End User completes the download
- Files are automatically purged after a specified number of days
- The concept of “Agents” is supported: you can allow your agents to see all the HIPs associated with them and track status
- A full audit trail is maintained showing all uploads, downloads, etc.

User Guide

System Configuration

Legal Vault is accessed in two ways. Administrators access the Vault via the admin area of their website. Clients access the Vault via a URL that is uniquely generated for each client.

If you work with multiple Estate Agents, each can have private access to just the HIPs that you have generated on behalf of mutual clients.

Submitting a New HIP

To submit a new HIP to Legal Vault all you need to do is send an email with the HIP document attached.

When you send an email, the email address that you use will be different depending on the Estate Agent partner that you are working with.

If you are not working with an estate agent for a particular client, then there will be a generic email address.

The email addresses take the following form :-

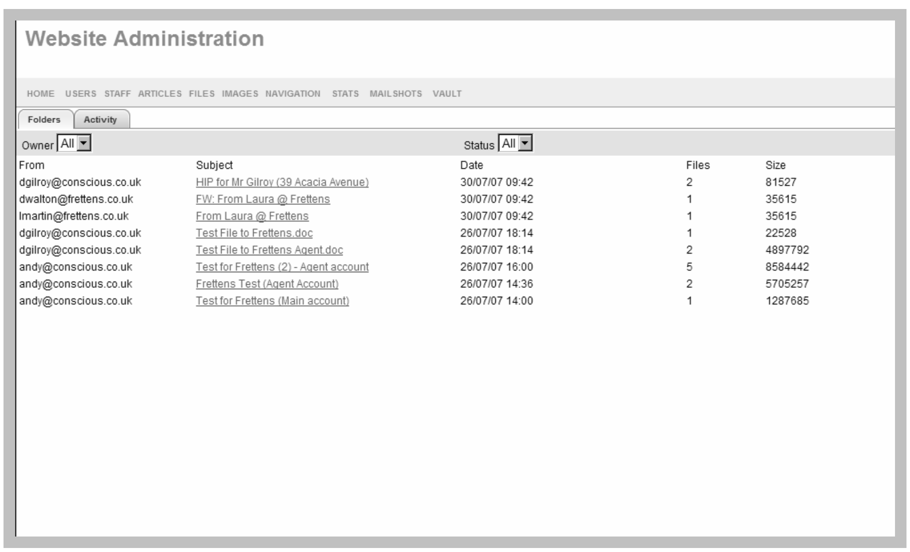
Generic address -	lawfirmname@legalvault.co.uk
Estate Agent partner -	lawfirmname-agentname@legalvault.co.uk

The email subject line, should be something meaningful to you. For example, the subject line could be any of the following :-

- HIP for Mr David Gilroy
- HIP for David Gilroy (1 Church Lane)
- HIP for 1 Church Lane
- HIP for 189045-98/Gilroy

When an email is sent to one of these addresses the attached files are stripped off the email and saved on the web server in a directory with a randomly generated file path name.

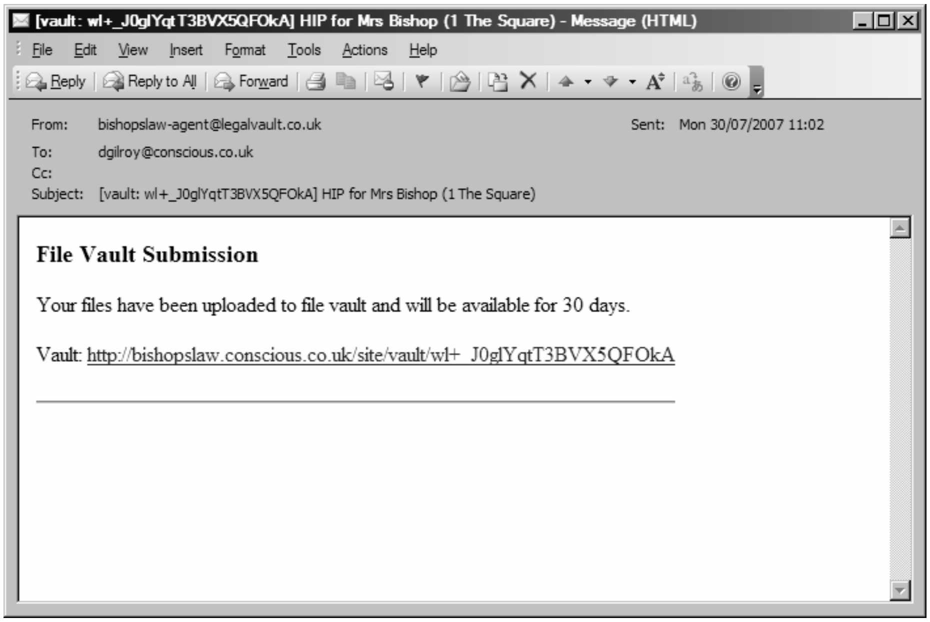
When you log in to the admin area of your website, you need to click on the "Vault" button on the admin toolbar, and you will see a screen something like the following.



Confirmation of HIP receipt

When you submit a new email to Legal Vault, with a file attached, you will receive an email response. The response will look something like the following screenshot.

This confirmation is sent to the person who submitted the original email.



There are two important elements to this email :-

- **Subject Line** - the subject line shows the randomly generated code which is the file path where the HIP has been stored. The following are sample codes so you have some idea of what they are going to look like :-
    - wl+_J0glYqtT3BVX5QFOkA
    - QkpGdMSOIb8NEtu+8hKWnQ
    - W_oQPg6_kacKBkth_hnh_w

- **Hyperlink** - the hyperlink in the body of the email is the link that you need to forward to the client to inform them as to where their HIP is stored. You can copy and paste the hyperlink into a new email from your practice management or CRM system so you have a record that you have sent it to the client.

Replacing an Existing HIP Document

You have the ability to replace an existing document with a new one.

In order to do this, you MUST ensure that you REPLY to the email confirmation email you have been sent. Also, please do NOT change anything inside the square brackets in the subject line.

Also you MUST keep the name of the HIP document the same i.e. do not change the filename from "Gilroy HIP V1.pdf" to Gilroy HIP V2.pdf".

Submitting Additional HIP Documents

If you need to submit additional documents for the client's HIP e.g. the surveys come in in two stages then there is a way to do this.

All you need to do is to reply to the original confirmation email and attach the one or more additional documents to the email.

By replying to the original email, Legal Vault recognises which client transaction the additional documents relate to by looking for the code in the subject line of the email. Again, please do not change anything inside the square brackets of the subject line.

So, it is important that the subject line is not changed and that you reply to the correct email, suggesting that you make the subject line meaningful by using the client's name, property name of a unique reference number that matches a case number, for example.

Access to HIPS by Estate Agents

Each Estate Agent partner will be provided with a unique login that will allow them to log in to the admin area of your website, but only view the Legal Vault area of the website.

You will need to provide us with a list of all the Estate Agent partners you will be working with. We will then provide you with a spreadsheet showing the email address, username and password that apply to each agent.

The email address will be the one that you will use to send a new HIP (see Section 0).

Estate Agent Logins

As part of the setup of Legal Vault on your website, you will have provided us with a list of the Estate Agents who need access to Legal Vault at launch. We will have supplied you with an Excel spreadsheet with the appropriate details. This spreadsheet will contain :-

- the **email address** to which you should send the email with the HIP attached.
- the **username** that the Estate Agent should use
- the **password** that the Estate Agent should use

Adding a new Estate Agent

You can create new Estate Agents via the ADMIN area

Client Access to HIPS documents

To allow a client access to their HIP you should take the distinct URL and forward it on to your client.

Client Access Security

The path name that is generated for each unique HIP document is calculated using a Base 64 encoded 128bit MD5 Hash algorithm.

If you want more information, feel free to read
http://www.w3.org/TR/1998/REC-DSig-label/MD5-1_0