File & Serve *Xpress*™

Batch Document Processor

User Guide

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File & ServeXpress
Resources

File & ServeXpress has many resources available to you in order to address your questions and concerns.

» **File & ServeXpress 24/7 Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 1-888-529-7587.

» **File & ServeXpress Resource Center** is available within File & ServeXpress by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!

» **File & ServeXpress Login Page** is where you can find password help, what's new and any important information like scheduled maintenance or system changes. Click here to access the login page.

» **File & ServeXpress Notices** is an information page that is available on the top, right-hand side of the File & ServeXpress Home tab, once you sign into File & ServeXpress. This page will provide you with any critical information, such as system maintenance or downtime, changes in fees, legal notices, litigation launches and much more.

Batch Document Processor Overview

The **Batch Document Processor** feature is your one-stop-shop for all of your Batch Printing & Downloading needs. This feature allows a user to print, download, and/or purchase one or more documents at a time from Transactions and document lists throughout File & ServeXpress (e.g. Inbox, Sent Items, Searches, Clerk Review, Document Lists, etc.)

CREATING YOUR BATCH

1. When search results are displayed, there will be check boxes next to each Transaction and the documents within that Transaction.
2. A "Select All" check box is available at the top of the list which will select all documents in all transactions on the list.
3. Once the documents have been selected, choose an action (download or print) from the drop-down list above the list of transactions and select "Go".

Batch Document Processor Tips:

✓ **You will need to have the Batch Document Processor 4.0 installed in order to retrieve your documents.**

✓ If you do not have the Batch Document Processor 4.0 installed, you will see a pop-up screen which will instruct you to download and install the Batch Document Processor software.

✓ Please note that you may need to check with your IT Administrator to see if your computer has administrative rights to install the software.

✓ Follow the directions on the screen to install the Processor.

✓ This is a one-time-only install, unless future updates are made available.

✓ You can also find a link to the Batch Document Processor software in the What's New section of our Resource Center.

1. A summary page of the documents selected will be displayed according to the requestor's security rights to each document:
   a. "Documents Require Purchase" – Documents that must first be purchased before they can be printed or downloaded,
   b. "Available Documents" – Documents that are available to be printed/downloaded with no additional charge, and
   c. "Unavailable Documents" - Documents that the requestor does not have security access to view because they are sealed, private, or have some other restricted access.
2. To purchase a document, check the box next to the document you wish to purchase, enter your client matter billing code, then select "Purchase." The screen will refresh as the system records your purchase.

Batch Document Processor Tips:

✓ Your batches will be saved in the Batch Document Processor for 30 days or until you remove them, whichever comes first..

File & ServeXpress Batch Document Security Check Results
We have conducted a security check of your rights to the documents you have selected. We have found the following:

3 document(s) are available [?]

Available Documents   Show 10 ▼ records

1-3 of 3 Available Documents

Date	Document Title	Transaction ID	Document Type	Court	Case Number	Case Name
1/26/2011 4:10 PM MST	Complaint filed on behalf of MCA	35603022	Complaint	CO Mock County District Court	2011CV126	Mock Collections Agency vs Johnny, Jimmy
1/26/2011 4:10 PM MST	Civil Case Cover Sheet	35603022	Civil Case Cover Sheet	CO Mock County District Court	2011CV126	Mock Collections Agency vs Johnny, Jimmy
1/26/2011 4:10 PM MST	Exhibit A, pages 1-5, Contract. Exhibit B, pages 6-8, returned.	35603022	Filing Other	CO Mock County District Court	2011CV126	Mock Collections Agency vs Johnny, Jimmy

1-3 of 3 Available Documents

Create Job   Close

3. Select the "Create Job" button at the bottom of the refreshed screen. You will then receive a message that states that your documents have been saved and that provides you with a Batch Job number. The batch file is now created. The file is listed as a Job Number. (listed as year, month and date and time).

Note: As of July 2013, the Batch Document Processor 4.0 is required; please uninstall your current version and then download and reinstall the new version referenced below.
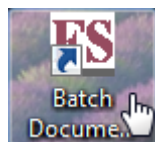
The available documents you have selected have been saved as a Batch Job: **20171108182451**. To access and download or print this job, you must install Batch Document Processor 4.0 (Administrator rights are required). Batch Jobs are saved in our system for 30 days.

For additional assistance, please contact File & ServeXpress Customer Support at 1-888-529-7587. Our team is available 24 hours a day, 7 days a week to assist you.

Saved Batch Jobs   Show 50 ▼ records

▼ Job Number	Document Count	Date Created
20171108182451	3	11/8/2017 6:24 PM EST

Close

4. You can now proceed with downloading or printing of your batch documents by double-clicking on the Batch Document Processor Icon on your desktop.
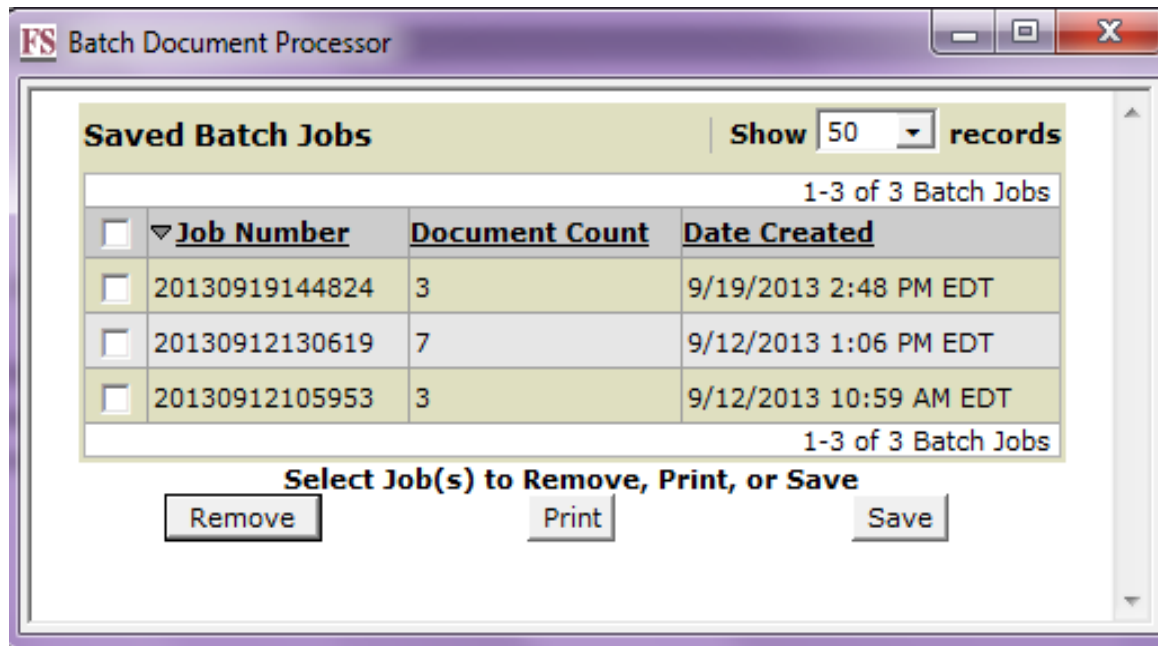

5. Enter your File & Serve User ID and Password.

Batch Document Processor Tips:

✓ Use your File & ServeXpress ID to log into the Batch Document Processor.

6. A screen with a list of all batch jobs you have requested will appear. Select your documents by placing a checkmark next to the Job Number assigned to the documents you wish to download or print. You can choose to remove, print or save your documents at this time.
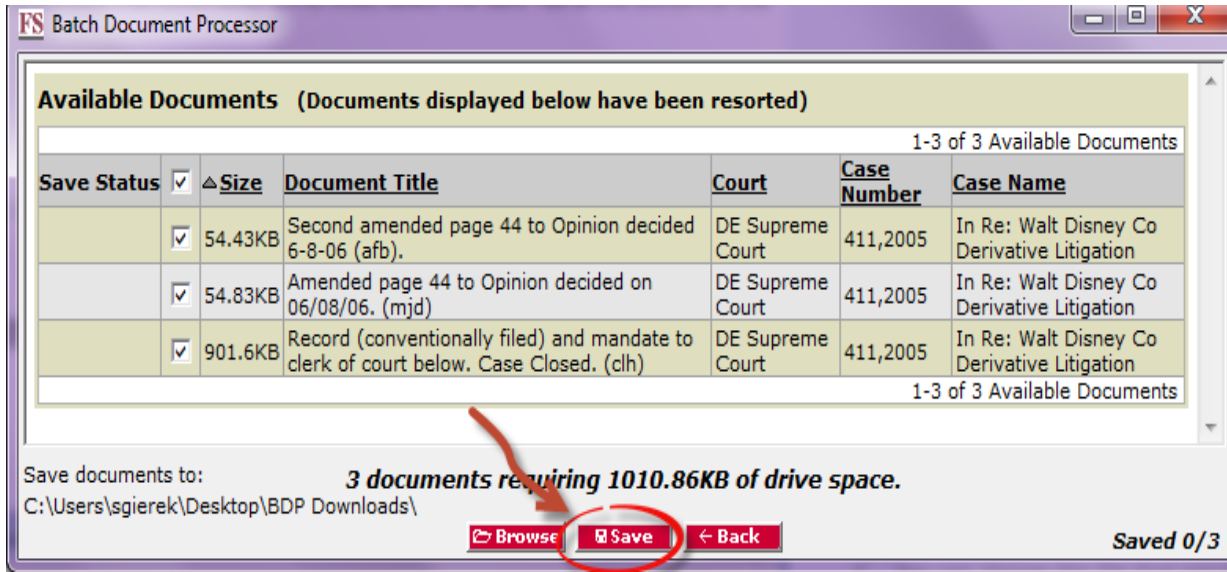

Batch Document Processor Tips:

✓ Use your File & ServeXpress ID to log into the Batch Document Processor.

Downloading your batch

1. To Download your documents from the Saved Batch Jobs page, place a checkmark next to the Job or Jobs you wish to download
2. Select the Save Tab.
3. A list of Available Documents will appear. The documents from the jobs you selected on the previous page will automatically be selected. If you choose not to download one of the documents, simply uncheck that document. Otherwise, select the Save Tab at the bottom of the screen.

Batch Document Processor Tips:

✓ Please note that the documents will print to your default printer.

✓ If you wish to have them printed at a different printer, you will need to change your default printer settings.

Printing your batch

1. To Print your documents from the Saved Batch Jobs page, place a checkmark next to the Jobs you wish to print.

2. Select the Print Tab.

3. A list of Available Documents will appear. The documents from the jobs you selected on the previous page will automatically be selected. If you choose not to print one of the documents, simply uncheck that document. Otherwise, select the Print Tab at the bottom of the screen.

Batch Document Processor Tips:

✓ You can change the file that you wish to save the documents to by clicking on the Browse tab and browsing out to the desired folder.

✓ Double click on the folder you wish to save the documents to and then click the Save Tab on the Available Documents screen.