# File & Serve Xpress

## Batch Document Processor User Guide



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Batch Document -Processor

# File & ServeXpress **Resources**

File & Serve *Xpress*-

# 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 <u>here</u> 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".

	52422779	8/19/2014 12:06 PM MDT	CO Denver County- County Court	2009C12319 CITY & COUNTY OF DENVER vs. 1995 HONDA 4DR et al	Larry L Bohning, CO Denver County-County Court		Order	Granted (Order Granting Misc Motion) [view] • Linked to (1)	0.2MB
	52478711	9/11/2017 10:02 AM MDT	CO Mock County District Court	2017C911911 Mock Collections vs Greg Gregory	Justin Payne, Mock Appeals Firm A-Demo		Answer	Answer [view]	0.1MB
	52478726	Purchase docu Add to Custom	Document List	017C911911 ock Collections vs Greg Gregory	Justin Payne, Mock Appeals Firm A-Demo		Notice Filed	Notice of Appearance [view]	0.1MB
	Transaction	 Download doc Print documen		ase Number ase Name	Authorizer Organization	•	Document Type	Document Title	Size
		Select Remove from		5				1-50 of 287 transactions << <b>Prev</b> Page 1 of	f 6 Next>>
Thoo	se an action:	Download doc	uments	▼ Go   Show 50 ▼ r	ecords				



#### 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.

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 <u>available</u> ?

ds ts

Available Documen	ts					Show 10 v record
					1-3	of 3 Available Documents
<u>Date</u>	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		Mock Collections Agency vs Johnny, Jimmy
1/26/2011 4:10 PM MST	Civil Case Cover Sheet	35603022		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



#### 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.. 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 <u>Batch</u> <u>Document Processor 4.0</u> (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 v records
▼]ob Number	Document Count	Date Created	_
20171108182451	3	11/8/2017 6:24 PM EST	

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.

Close

Batch In Docume	User Name: Password: Sign On	File & ServeXpress Client Support is available to assist you, 24 hours a day, 7 days a week by phone at 888-529-7587 or by email at <u>support@fileandservexpress.com</u>

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.

Sav	red Batch Jobs		Show 50 • records
			1-3 of 3 Batch Jobs
	⊽ <u>Job Number</u>	Document Count	Date Created
	20130919144824	3	9/19/2013 2:48 PM EDT
	20130912130619	7	9/12/2013 1:06 PM EDT
	20130912105953	3	9/12/2013 10:59 AM EDT
	·		1-3 of 3 Batch Jobs
	Select J	ob(s) to Remove, F	Print, or Save
	Remove	Print	Save



#### 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.

Save Statu	5 🔽	⊿Size	Document Title	Court	Case	of 3 Available Documents	
		54.43KB	Second amended page 44 to Opinion decided 6-8-06 (afb).	DE Supreme Court	<u>Number</u> 411,2005	In Re: Walt Disney Co Derivative Litigation	
Am		54.83KB	Amended page 44 to Opinion decided on 06/08/06. (mjd)	DE Supreme Court	411,2005	In Re: Walt Disney Co Derivative Litigation	
		901.6KB	Record (conventionally filed) and mandate to clerk of court below. Case Closed. (clh)	DE Supreme Court	411,2005	In Re: Walt Disney Co Derivative Litigation	
1-3 of 3 Available Documents							



#### 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.

	Conior							o / tranabie	e Documents
	copies	△ <u>Date</u>	Document Title	Pages	Transaction ID	Document Type	<u>Court</u>	<u>Case</u> Number	<u>Case Name</u>
~	1	6/9/2006 12:54 PM EDT	Amended page 44 to Opinion decided on 06/08/06. (mjd)	1	11491064	Opinion	DE Supreme Court	411,2005	In Re: Walt Disney Co Derivative Litigation
~	1	6/9/2006 3:02 PM EDT	Second amended page 44 to Opinion decided 6-8-06 (afb).	1	11493201	Opinion	DE Supreme Court	411,2005	In Re: Walt Disney Co Derivative Litigation
			✓ 1 12:54 PM EDT ✓ 1 6/9/2006 3:02 PM	✓     1     12:54 PM EDT     to Opinion decided on 06/08/06. (mjd)       ✓     1     6/9/2006 3:02 PM EDT     Second amended page 44 to Opinion decided 6-8-06	✓ 1 12:54 PM EDT to Opinion decided on 06/08/06. (mjd) 1   ✓ ✓ 6/9/2006 3:02 PM EDT Second amended page 44 to Opinion decided 6-8-06 (afb). 1	✓     1     12:54 PM EDT     to Opinion decided on 06/08/06. (mjd)     1     11491064       ✓     ✓     6/9/2006 3:02 PM EDT     Second amended page 44 to Opinion decided 6-8-06 (afb).     1     11493201	✓     1     12:54 PM EDT     to Opinion decided on 06/08/06. (mjd)     1     11491064     Opinion       ✓     1     6/9/2006 3:02 PM EDT     Second amended page 44 to Opinion decided 6-8-06 (afb).     1     11493201     Opinion	✓   1   12:54 PM EDT   to Opinion decided on 06/08/06. (mjd)   1   11491064   Opinion   Supreme Court     ✓   1   6/9/2006 3:02 PM EDT   Second amended page 44 to Opinion decided 6-8-06 (afb).   1   11493201   Opinion   DE Supreme Court	✓   1   12:54 PM EDT   to Opinion decided on 06/08/06. (mjd)   1   11491064   Opinion   Supreme Court   411,2005     ✓   1   6/9/2006 3:02 PM EDT   Second amended page 44 to Opinion decided 6-8-06 (afb).   1   11493201   Opinion   DE Supreme Court   411,2005



#### 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.