



File & Serve *Xpress*<sup>™</sup>

## **Tracked Items**

User Guide

# Tracked Items

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## 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.

# File & ServeXpress Resources

# Tracked Items Overview

The Tracked Items feature is a monitoring tool that allows users to track specific cases from their home page. Tracked Items is accessible on the File & ServeXpress home page in the Track & Manage tools box.

File & ServeXpress™

Preferences | Sign Out  
Powers, Max | Mock Appeals Firm B-Demo  
File & ServeXpress Notices

HOME | FILING & SERVICE | ALERTS | SEARCH

The screenshot shows the File & ServeXpress home page. On the left is a 'MailBox' section with links for Inbox, Sent Items, Rejected Items, and Saved Transactions. In the center is a 'Quick Start' section with dropdown menus for State and Court, a text input for CaseNumber OR CaseName, and three buttons: File/Serve, Case Search, and Set Track Case. On the right is a 'Track & Manage' section with a Transaction ID input and a GO button. Below this is a list of navigation links: Alerts, Tracked Items (circled in red), Case Tracked Items, Calendar, Message Boards, My Attorneys, Case View, Document Upload, Case & Party Management, Billing Information, and Custom Document Lists.

Click on the **Tracked Items** hyperlink to view your cases. From this page you can **File & ServeXpress** into your selected cases, view the case history and party information, and check for newly received, recently filed and rejected documents. You may also view any new Alerts you have set for that particular case.

## Tracked Items Tips:

- ✓ **Functions:** automated case management tool that provides an alphabetic “File Cabinet” view of your cases with hyperlinks to save time when eFiling, e-serving, and accessing case information.
- ✓ **Pricing:** Tracked Items is a **complimentary** case management tool provided to users by File & ServeXpress.

# Tracked Items

HOME

FILING & SERVICE

ALERTS

SEARCH

Home > Tracked Cases & Groups

Tracked Cases & Groups (6) [Tracking Setup](#)

Show 50 records

Case Name Or Case Group Name	Case Number	Court	Case History	Inbox	Rejected Documents
Augusta Inc vs Atlanta LLC	<a href="#">2010CV5617</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Bank of the West vs Susan Miller	<a href="#">2011CV1123</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Holly Kennedy vs Colorado Wildlife Refuge	<a href="#">2012CV504</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>	<a href="#">File &amp; Serve</a>
In the Matter of Charles Harris	<a href="#">2012CV227</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>	<a href="#">File &amp; Serve</a>
Vincent, Michelle vs BBB Airlines	<a href="#">2011CV104</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Vincent, Michelle vs BBB Airlines	<a href="#">2011cv105</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>

1. To file directly into one of your tracked cases click the **File & Serve** hyperlink in the furthest column to the right for the case. This link will take you directly to the **Documents** tab by bypassing the Filing & Service tab.
2. To view new rejected items, click the **View** hyperlink in the **Rejected Documents** column for the respective case.
3. To view new sent items, click the **View** hyperlink in the **Sent Items** column for the respective case.

## Tracked Items Tips:

- ✓ **“View” hyperlink:** if there is no View hyperlink in any respective column. There are no new items to view for the respective case.
- ✓ **Column Headers:** all columns and the information therein can be added and deleted from Tracked Items at the user’s discretion. Please see below for more information on this function.

# Tracked Items

1. To view new Inbox items, click the **View** hyperlink in the **Inbox** column for the that case.
2. To view the Case History (all transactions in that case), click the Case Number hyperlink.
3. To sort the Court column, click the Court hyperlink in the top row.

# Tracked Items Setup

There are two ways to begin tracking cases: in the File & ServeXpress Quick Start box on home page and on the Tracked Items Setup page.

## File & ServeXpress Quick Start

### ► MailBox

Inbox  
Sent Items  
Rejected Items  
Saved Transactions

### ► Quick Start

State

Court

CaseNumber OR CaseName

[File/Serve](#) [Case Search](#) [Set Track Case](#)

### ► Track & Manage

Transaction ID

[GO](#)

#### Alerts

Tracked Items  
Edit Tracked Items  
Calendar

#### Message Boards

My Attorneys  
Case View  
Document Upload  
Case & Party Management  
Billing Information  
Custom Document Lists

## File & ServeXpress Quick Start

On the File & ServeXpress home page, the Quick Start box is located in the center of the page. To create a new Tracked Case:

1. Choose the appropriate State or Jurisdiction from the first dropdown list in the Quick Start box.
2. Choose the Court or e-Service project from the second dropdown list in the Quick Start box.
3. Enter the Case Number.
4. Click the button for Set Tracked Case.

## File & ServeXpress Tracked Items link

You can also access the Tracked Items set up page by clicking on the Tracking Setup hyperlink on the Tracked Cases & Groups page.



HOME

FILING &amp; SERVICE

ALERTS

SEARCH

Home &gt; Tracked Cases &amp; Groups

Tracked Cases & Groups (6) **Tracking Setup**

Show 50 records

Case Name Or Case Group Name	Case Number	Court	Case History	Inbox	Rejected Documents
Augusta Inc vs Atlanta LLC	<a href="#">2010CV5617</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Bank of the West vs Susan Miller	<a href="#">2011CV1123</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Holly Kennedy vs Colorado Wildlife Refuge	<a href="#">2012CV504</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>	<a href="#">File &amp; Serve</a>
In the Matter of Charles Harris	<a href="#">2012CV227</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>	<a href="#">File &amp; Serve</a>
Vincent, Michelle vs BBB Airlines	<a href="#">2011CV104</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Vincent, Michelle vs BBB Airlines	<a href="#">2011cv105</a>	CO Mock County District Court	<a href="#">View</a>		<a href="#">File &amp; Serve</a>

To set your case to track, scroll down to the second area of the Tracked Cases & Groups Setup Page. The Find Items tab is displayed by default.

1. To retrieve a list of cases in which you are directly involved, select a jurisdiction and Court from the drop-down menu, click the My Cases radio button, and then click Find. All cases in which you are involved in that court will appear.

\* Jurisdiction: Colorado ▼

Court: Colorado Mock County Court ▼

All Cases  
 My Cases  
 Firm Cases  
 Case Groups in Court

Case number:  ⓘ

Case name:  ⓘ

**Find**

- To select the cases you want to track, click the check box by the case name, then click the Add Tracked Item(s) button. If you wish to choose all of the cases, place a checkmark in the checkbox on the gray header bar (screenshot on next page). The case will be added to the list of cases on your Tracked Items screen.

## Tracked Items Tips:

- ✓ To choose which columns you want displayed for the cases you are tracking. Select the columns by clicking the check box for the available column and click the Save button.

Home > Tracked Cases & Groups > Tracking Setup

1. Select which data items you would like to display for your tracked items:

Case Name or Case Group Name

Case number

Court name

Case History Link

Inbox

Sent Items

Rejected Documents

Alerts

File & ServeXpress Link

**Save** **Cancel**

## Tracked Items Tips:

- ✓ To retrieve a list of cases in which all attorneys at your firm are involved, select a court from the drop-down box and click the  Firm Cases radio button and click **Find**. All cases in which attorneys at your firm are involved will appear.
- ✓ You may choose to select cases to track individually or track cases in which your firm is not directly participating by selecting the **Court Name** from the drop down menu, selecting the  All Cases radio button

### Add Tracked Item(s)

1-50 of 64 case(s) <<Prev | Page 1 of 2 | Next>>

<input type="checkbox"/>	Court	Case name	Case number
<input checked="" type="checkbox"/>	Colorado Mock County Court	Ace Rentals vs Harry Krueger	2008C6717
<input checked="" type="checkbox"/>	Colorado Mock County Court	Allenstown Collection Agency vs. Gina Davis	2008C5521
<input checked="" type="checkbox"/>	Colorado Mock County Court	Allenstown Collection Agency vs. Harry Reid	2008C445355
<input checked="" type="checkbox"/>	Colorado Mock County Court	Allenstown Collection Agency vs. Peter Presley	2008C5666
<input checked="" type="checkbox"/>	Colorado Mock County Court	Allenstown Collection Agency vs. Raymond Nicholson	2008C5523
<input checked="" type="checkbox"/>	Colorado Mock County Court	Alpine Flooring vs Tom Dooley	2008C7575
<input checked="" type="checkbox"/>	Colorado Mock County Court	Alpine Flooring vs. Edward Hooligan	2008C7415
<input type="checkbox"/>	Colorado Mock County Court	Amanda Rogers vs Custom Cakes by Jan	2008C9808
<input type="checkbox"/>	Colorado Mock County Court	Aspen Leaf Landscaping vs Paul Scott	2008c1120
<input type="checkbox"/>	Colorado Mock County Court	Aspen Leaf Tree & Shrub vs Jim Baker	2008C56128
<input type="checkbox"/>	Colorado Mock County Court	Bank of the West vs Quincy Magoo	2008C8002
<input type="checkbox"/>	Colorado Mock County Court	Ben Myren vs Shannon Brown	2008C2008

3. Users may also search for a case by entering a **Case Name** or **Case Number** then clicking **Find**.
4. Once the list of cases appears, to select the cases you want to track, click the check box by the case name, then click the **Add Tracked Items** button. If you wish to choose all of the cases, place a checkmark in the checkbox on the gray header bar. The case will be added to the list of cases on your **Tracked Items** screen.
5. Once you have created a list of cases to track on your home page, they will remain there until you remove them.

# Managing Tracked Items

From the **Selected Items** tab of the **Tracking Setup** page, you can remove **Tracked Items** you are no longer interested in Tracking.

FIND ITEMS SELECTED ITEMS

**Items Currently Tracked (6)**  
Remove Tracked Item(s)

**Cases Currently Tracked (6)**

<input type="checkbox"/> Court	▲ Case name	Case number
<input type="checkbox"/> CO Mock County District Court	Augusta Inc vs Atlanta LLC	2010CV5617
<input type="checkbox"/> CO Mock County District Court	Bank of the West vs Susan Miller	2011CV1123
<input checked="" type="checkbox"/> CO Mock County District Court	Holly Kennedy vs Colorado Wildlife Refuge	2012CV504
<input type="checkbox"/> CO Mock County District Court	In the Matter of Charles Harris	2012CV227
<input type="checkbox"/> CO Mock County District Court	Vincent, Michelle vs BBB Airlines	2011CV104
<input type="checkbox"/> CO Mock County District Court	Vincent, Michelle vs BBB Airlines	2011cv105

1-6 of 6 case(s)

**Case Groups Currently Tracked (0)**

<input type="checkbox"/> Court	Group Name
You have 0 tracked items.	

Remove Tracked Item(s)

## Tracked Items Tips:

- ✓ **Tracking Cases A Firm is Not Involved In:** If you are tracking a case that you or an attorney at your firm is not involved in, you will still be able to view the list of all transactions in a case. However, you will be charged research fees to view the docket and documents.

1. From the Tracking Setup link on the Tracked Items page, scroll down to option # 2.
2. Click on the tab for Selected Items.
3. A list of all Tracked Items will appear. Place a checkmark next to the case/case group you wish to remove from your Tracked Items and click the Remove **Tracked Items** button. This will remove the case/case group from your **Tracked Items** list.