File & ServeXpress™

Custom Document
Lists -
User Guide

File & Serve*Xpress*

Custom Document Lists

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File & ServeXpress Resources

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

- **File & Serve*Xpress* 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** **https://secure.fileandservexpress.com/Login/Login.aspx** is where you can find password help, what's new and any important information like scheduled maintenance or system changes.

- **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.

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Custom Document List Overview

The **Custom Document List (CDL)** functionality allows File & ServeXpress Advanced users to create and manage lists of hand-picked documents that are available on the File & ServeXpress system. Users can name their **Custom Document Lists** and store detailed notes (both private and shared), in addition to storing their documents.

Users may also batch print or download from an existing **Custom Document List**. Once created, a **Custom Document List** is available to all users in the organization via their individual IDs using the **Custom Document List** link in the **Track & Manage** section of the File & ServeXpress **Home Page.** To **view** created Custom Document Lists, click the link the Track & Manage section of the File & ServeXpress Homepage.
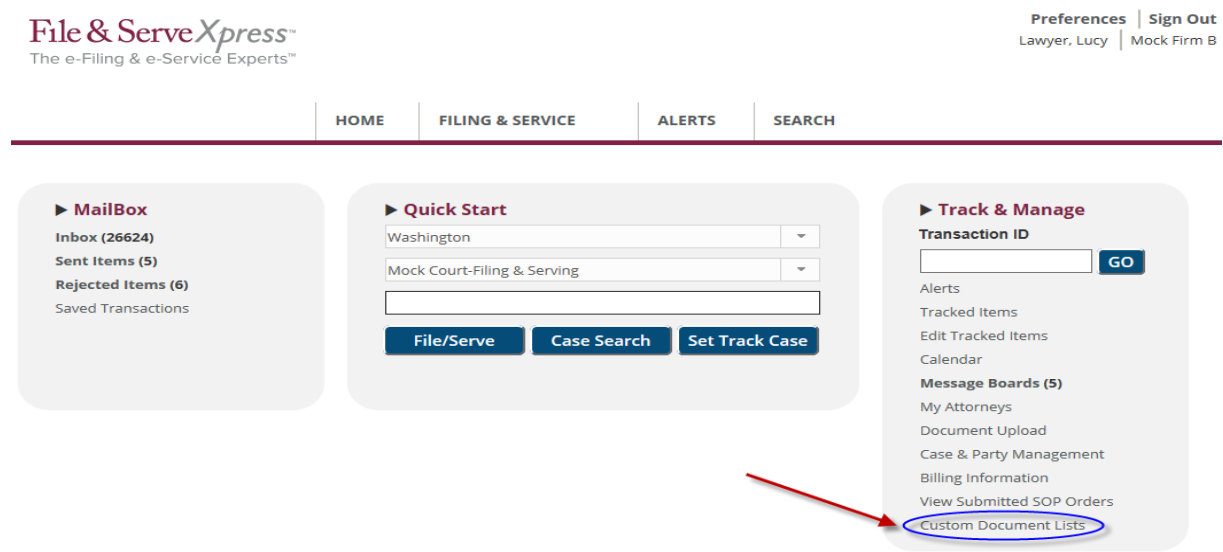
CDL Tips:

✓ **Functions (these actions can be performed on any screen where the user sees the "Chose an action" drop down):**
  - **Check Boxes.** Use the check box at the top of the column to select/de-select or "check" all of the boxes in the column to perform an action on. Use check boxes in individual rows to select/de-select individual records.
  - **Download documents.** Use to download multiple documents.*
  - **Print documents.** Use to print multiple documents.*
  - **Add to Custom Documents List.** Individually select documents to be stored in custom "folders". Add the documents to existing or new folders and share notes. (See next page for more information on Custom Documents List).
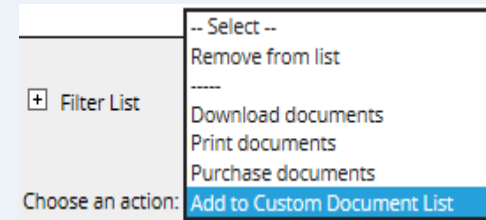
✓ **Pricing:** There is no charge to use any of these features. Research charges will apply to all cases/documents on which the attorney is not attorney of record.

*To use the Download Documents and Print Documents features, batch processing software must be downloaded.4

Creating Custom Document Lists

To add documents to a new **Custom Document List**:

1. Pull up the list of documents or transactions to be added and place a checkmark in the box to the left of the Transaction ID number or document title. To select all documents, choose the check box at the top of the column.

2. Select **"Add to Custom Document List"** in the Choose an action drop-down list at the top of the document list and click the **"Go"** button.

CDL Tips:

- ✓ **Sample Use:** A firm clerk can create a **Custom Document List** to earmark the documents served on a client in numerous cases that an attorney needs to review. The clerk can pick documents from any case, specify the order in which the documents should appear to the attorney, and write a note to the attorney with special instructions. The attorney can then open the **Custom Document List**, read the clerk's notes and documents contained in the list, and respond as necessary.

- ✓ Users may select individual documents or transactions from the following areas of the application:

    - Inbox Items (including Calendar events)
    - Sent Items
    - Rejected Items
    - Items for Clerk Review (for court users only)
    - Items for Judge Review (for court users only)
    - Case History Search
    - Daily Docket Search
    - Transaction Status Search
    - Advanced Search
    - Alerts

- ✓ **Note:** At this time, users cannot add documents to a Custom Document List from the Calendar search results page.

3. A pop-up window will appear displaying the selected documents. To add documents to a new **Custom Document List**, select the option to **"Create a new Custom Document list"** and click the **"Next"** button.

Save Custom Document List

○ Add these documents to an existing Custom Document List.
◉ Create a new Custom Document List.

[Next]

Selected Documents

Show [All ▾] records

							1-3 of 3 Selected Documents
△ Transaction	Event Date/Time	Case Number	Case Name	Authorizer	Organization	Document Type	Document Title
54690427		15CV12345	Smith, James vs A B C Auto Inc	Adam Attorney	Mock Firm A-Bellevue	Complaint	Plaintiff's Complaint and Demand for Jury Trial
54691110		15CV12345	Smith, James vs A B C Auto Inc	Lucy Lawyer	Mock Firm B	Answer	Defendant A B C Auto's Answer to Plaintiff James Smith's Complaint
54691110		15CV12345	Smith, James vs A B C Auto Inc	Lucy Lawyer	Mock Firm B	Counterclaim	Defendant A B C Auto's Counterclaim against Plaintiff James Smith
							1-3 of 3 Selected Documents

[Cancel]

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After clicking the Next button, the Custom Document List name and notes fields will display.

Save Custom Document List

    * Name:

    Notes
    (optional):

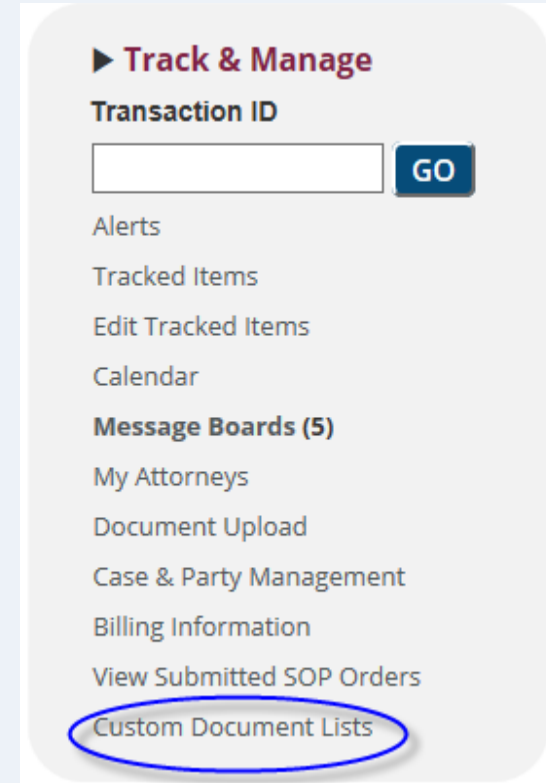Required information is marked with an asterisk (*).

Next

4. Enter the name of the **Custom Document List**, add notes, and click **"Next"** to submit the changes.
5. After clicking the **Next** button, a confirmation page will appear confirming the name of the **Custom Document List** that has been created and to which the selected documents were added.

The documents you have selected have been saved as a Custom Document List: **Smith, James Documents**.
You may view or edit this Custom Document List by clicking on the Custom Document List link in the toolbox on your home page.

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.

CDL Tips:

✓ **Note:** The **Custom Document List** must be named, although it is optional to enter notes.

✓ To view the newly created **Custom Document List**, click the link in the **Track & Manage area of** the File & ServeXpress Homepage:

▶ **Track & Manage**

Transaction ID

GO

Alerts

Tracked Items

Edit Tracked Items

Calendar

Message Boards (5)

My Attorneys

Document Upload

Case & Party Management

Billing Information

View Submitted SOP Orders

Custom Document Lists

Adding Documents to an Existing Custom Document List

To add documents to an existing **Custom Document List**:

1. Pull up the list of documents or transactions to be added and place a checkmark in the box to the left of the Transaction ID number or document title. To select all documents, choose the check box at the top of the column.

2. Select **"Add to Custom Document List"** in the Choose an action drop-down list at the top of the document list and click the **"Go"** button.

A pop-up window will appear displaying the selected documents.

CDL Tips:

✓ Users may select individual documents or transactions from the following areas of the application:

- Inbox
- Sent Items
- Rejected Items
- Items for Clerk Review (for court users only)
- Items for Judge Review (for court users only)
- Case History Search
- Daily Docket Search
- Transaction Status Search
- Advanced Search
- Alerts

✓ **Note:** At this time, users cannot add documents to a Custom Document List from the Calendar search results page.

3. To add documents to an existing **Custom Document List**, select the option to **"Add these documents to an existing Custom Document list"** and click the **"Next"** button.

Save Custom Document List

Add to Custom Document List: | Smith, James Documents | ⌄ |

[Next]

4. Using the Drop Down Menu, select the name of the **Custom Document List** in which to add documents and then click the **"Next"** button.

5. After clicking the **Next** button, a confirmation page will appear confirming the name of the **Custom Document List** to which the selected documents were added.

The documents you have selected have been saved as a Custom Document List: **Smith, James Documents**.
You may view or edit this Custom Document List by clicking on the Custom Document List link in the toolbox on your home page.

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.

Viewing Custom Document Lists

To **access** an existing **Custom Document List**:

1. click the **Custom Document Lists** link from the Track & Manage area on the Home Page:

This will bring up a list where Users may view existing Custom Document Lists:

Home > **Custom Document Lists**

Custom Document Lists		Show 50 ▾ records		
Date Created	Name	View	Edit	Delete
8/18/2006 2:07:00 PM	Disney Documents	[View]	[Edit]	[Delete]
8/16/2006 4:42:33 PM	Motions for Summary Judgment	[View]	[Edit]	[Delete]
6/19/2008 5:55:14 PM	Cases for Review	[View]	[Edit]	[Delete]
9/30/2008 6:26:08 PM	Asbetos Motions for Summary Judgment	[View]	[Edit]	[Delete]
2/4/2009 6:03:44 AM	Lucy's Documents	[View]	[Edit]	[Delete]
1/19/2015 2:30:27 AM	Smith, James Documents	[View]	[Edit]	[Delete]

2. Click on the **View** hyperlink located in the column to the right of the **Custom Document List** you want to access.

CDL Tips:

✓ **Note**: Custom Document Lists are always shared with all users in the same organization.

After clicking the **View** link, users can view transaction details and open documents using the "view" links.

Home > Custom Document Lists > View "Smith, James Documents"

Choose an action: [-- Select -- ▾] [Go]

Custom Document List:
Smith, James Documents

Notes:

Private	Shared

The notes below are available only to you.

New Note:

Previous Notes:

Maximum Characters: 4000

[Save]

View Created: 1/19/2015 2:30 AM EST by Lucy Lawyer
Last Edited: 1/18/2015 9:44 PM EST by Lucy Lawyer

Selected Documents

Show [All ▾] records

1-4 of 4 Selected Documents

☐	Transaction	Event Date/Time	Case Number	Case Name	Authorizer	Organization	Document Type	Document Title
☐	54690427		15CV12345	Smith, James vs A B C Auto Inc	Adam Attorney	Mock Firm A-Bellevue	Complaint	Plaintiff's Complaint and Demand for Jury Trial[view]
☐	54691110		15CV12345	Smith, James vs A B C Auto Inc	Lucy Lawyer	Mock Firm B	Answer	Defendant A B C Auto's Answer to Plaintiff James Smith's Complaint [view]
☐	54691110		15CV12345	Smith, James vs A B C Auto Inc	Lucy Lawyer	Mock Firm B	Counterclaim	Defendant A B C Auto's Counterclaim against Plaintiff James Smith [view]
☐	54691173	1/29/2015 10:45:00 AM CST	15CV12345	Smith, James vs A B C Auto Inc	Andrew Associate	Mock Firm A-Bellevue	Filing Other	Calendar Event Creation[view]

1-4 of 4 Selected Documents

CDL Tips:

✓ **Note***:* Users can also choose to batch print and download documents on this page.

✓ **Using "Notes":** Users can add Private or Shared Notes by choosing the appropriate tab in the "Notes" section of the page and clicking the "Save" button.

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Editing a Custom Document List

To **edit** an existing **Custom Document List**:

1. Click the **Custom Document Lists** link from the Track & Manage area on the Home Page. This will bring up a list where Users may edit existing Custom Document Lists:

Home > **Custom Document Lists**

| Custom Document Lists		Show 50 ⌄ records		
Date Created	**Name**	**View**	**Edit**	**Delete**
8/18/2006 2:07:00 PM	Disney Documents	[View]	[Edit]	[Delete]
8/16/2006 4:42:33 PM	Motions for Summary Judgment	[View]	[Edit]	[Delete]
6/19/2008 5:55:14 PM	Cases for Review	[View]	[Edit]	[Delete]
9/30/2008 6:26:08 PM	Asbetos Motions for Summary Judgment	[View]	[Edit]	[Delete]
2/4/2009 6:03:44 AM	Lucy's Documents	[View]	[Edit]	[Delete]
1/19/2015 2:30:27 AM	Smith, James Documents	[View]	[Edit]	[Delete]

2. Click on the **Edit** link in the Edit Column to the right of the **Custom Document List** that should be accessed.
3. Use this screen to change the name of the Custom Document List, edit or remove notes, change the order of the documents, and remove specific documents.

Save Updates   Delete Marked Items   Cancel
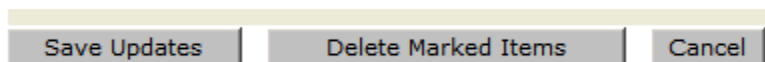
4. When finished with any desired edits, click the "Save Updates" tab to save these changes to the system.

CDL Tips:

✓ **Deleting a Custom Document List** After clicking the Delete link, a warning message confirms the delete action. When the user clicks "OK", the Custom Document List will be removed from the system. Clicking "Cancel" will return the user to the list of Custom Document Lists.

Message from webpage

? Are you sure you want to delete the selected Custom Document List?

OK   Cancel
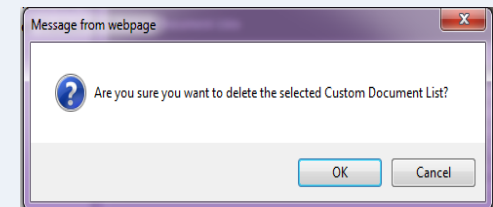
✓ **Note***:* Once a **Custom Document List** has been deleted from the system, it cannot be accessed again.