File & Serve Delaware™

Organization Administrator - User Guide

File & Serve Delaware

Organization Administrator User Guide

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File & Serve Delaware Resources

File & Serve Delaware has many resources available to you in order to address your questions and concerns:

- **File & Serve Delaware Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587.

- **File & Serve Delaware Microsite** is available from the File & Serve Delaware homepage by clicking on the link in the center of your screen. The Microsite contains our training registration information, jurisdiction specific rules and procedures, user guides, pricing, and more. Click http://www.fileandservexpress.com/delaware to access the Microsite.

- **File & Serve Delaware Login Page** is where you can find password help, a link to the registration page, and links for help and contact information. Click https://www.fileandservedelaware.com/ to access the login page.

- **Court Resources Page** is where you can find the court's user guides for court specific processes and procedures. Click http://courts.delaware.gov/commonpleas/efilingwelcome.aspx to access the Court's Resources Page.

File & Serve Delaware Navigation

Below are some general tips for navigating through the File & Serve Delaware system:

- To get *Help*, click on the icon.
- To view/edit your *Profile*, click on the icon. You can view a guide on user profile on our microsite at www.fileandservexpress.com/delaware.
- To *Logout*, click on the icon.
- Any information marked with a * is a mandatory field.
- If you try to move forward without completing mandatory information, a pop-up box will appear to let you know what needs to be completed to move forward.
- If you are on a page with tabs, click the previous tab(s) or the *Back* button to move backward through screens and the *Next* button to move forward through screens.
- Click on the *Home* link at the bottom of the page to navigate back to the login page.
- Click on the *About* link at the bottom of the page to view links to court information.
- Click on the *Contact Us* link to view our Client Support contact information and an online form to submit comments/questions.

Organization Administrator Overview

What is an Organization Administrator?

An Organization Administrator (“OA”) is an individual or group of individuals who have been granted special File & Serve Delaware permissions. The OA can make changes to user information and maintain other information pertaining to the organization’s File & Serve Delaware account. Every organization registered with File & Serve Delaware must have at least one user selected as an OA.

Where are the permissions accessed?

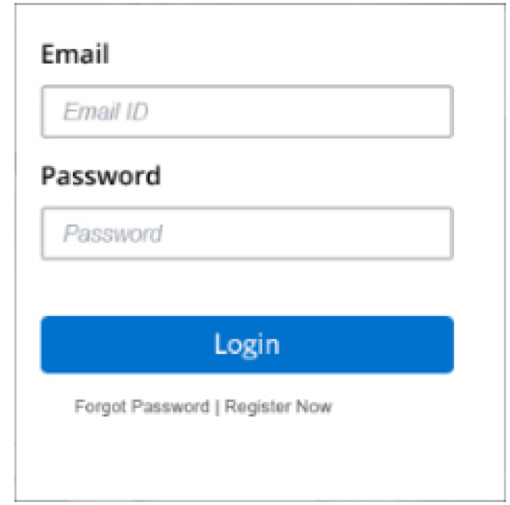
After logging into File & Serve Delaware, your Organization Administrator login credentials will generate menu options which are unique to your role.

With the four menu options above the OA is able to:

- E-Filing & E-Serving*- eFile and/or eServe into cases.
- Transaction Summary & Details*- View Transaction information for Draft Transactions, Sent Transactions, Received Transactions, or Rejected Transactions.
- Admin- Request new user credentials, remove users from the organization, reset user passwords, and modify user information.
- Reporting- Request Reports in order to view organization activity and costs.

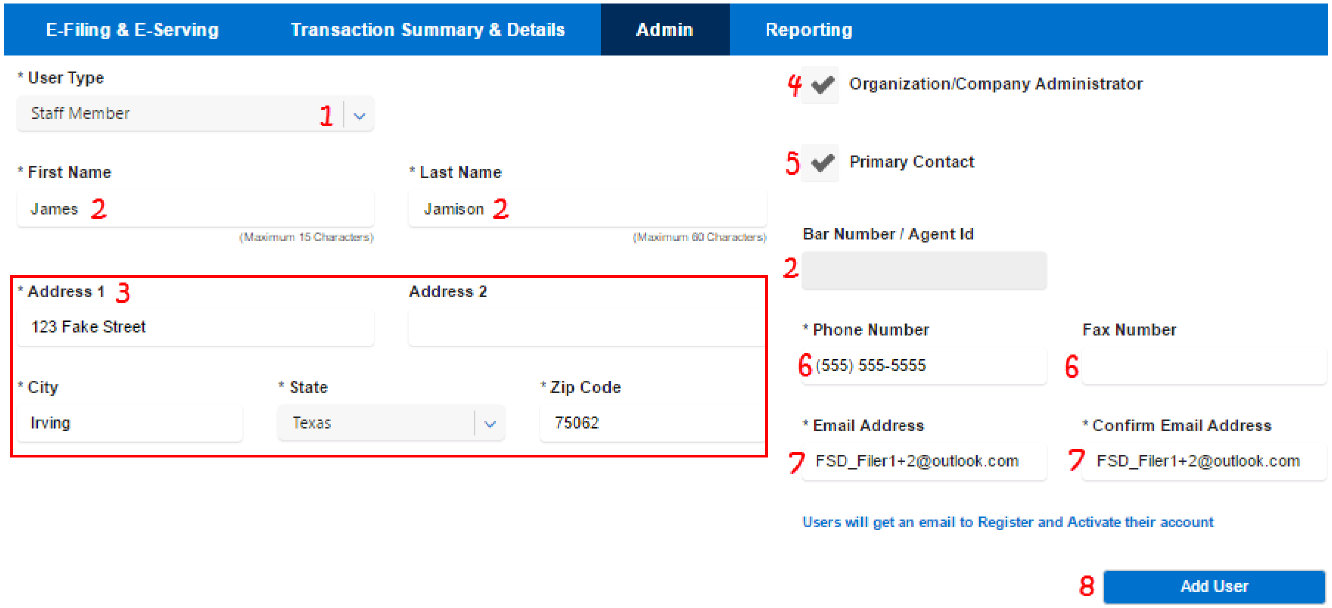
*Please refer to our “New case Filing” and “Subsequent Filing” user guides to learn more about the E-Filing & E-Serving and Transaction Summary & Details tabs.

Logging in to File & Serve Delaware



1. Before using File & Serve Delaware, you must have an ID and Password. If you do not have these, click the *Register Now* link on the Login page.
2. Open your internet browser and enter www.fileandservedelaware.com to access the login page.
3. Enter your ID and password and click **Login.**

Organization Administrator- Adding Users



*An Attorney account will be used to authorize filings and will require a bar number/agent ID, a Staff account will be used for completing transactions on behalf of an attorney. For user type attorney, File & Serve Delaware validates against Contexte (the State of Delaware Case Management System) by last name and bar number/Contexte ID. If the validation fails you need to first have the attorney name updated in the DE Bar Association system which will then update Contexte.

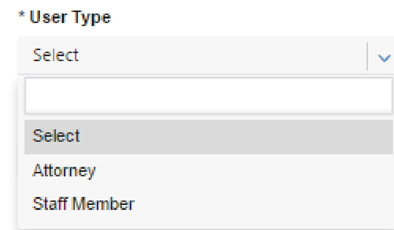
**A primary contact is designated for FSD to contact in case there are any issues with the account. Multiple primary contacts can be designated.

Note: All sections with an * are required fields.

Note: If you add a new user, an activation email will be sent to them which will allow them to complete the registration process and update their password.

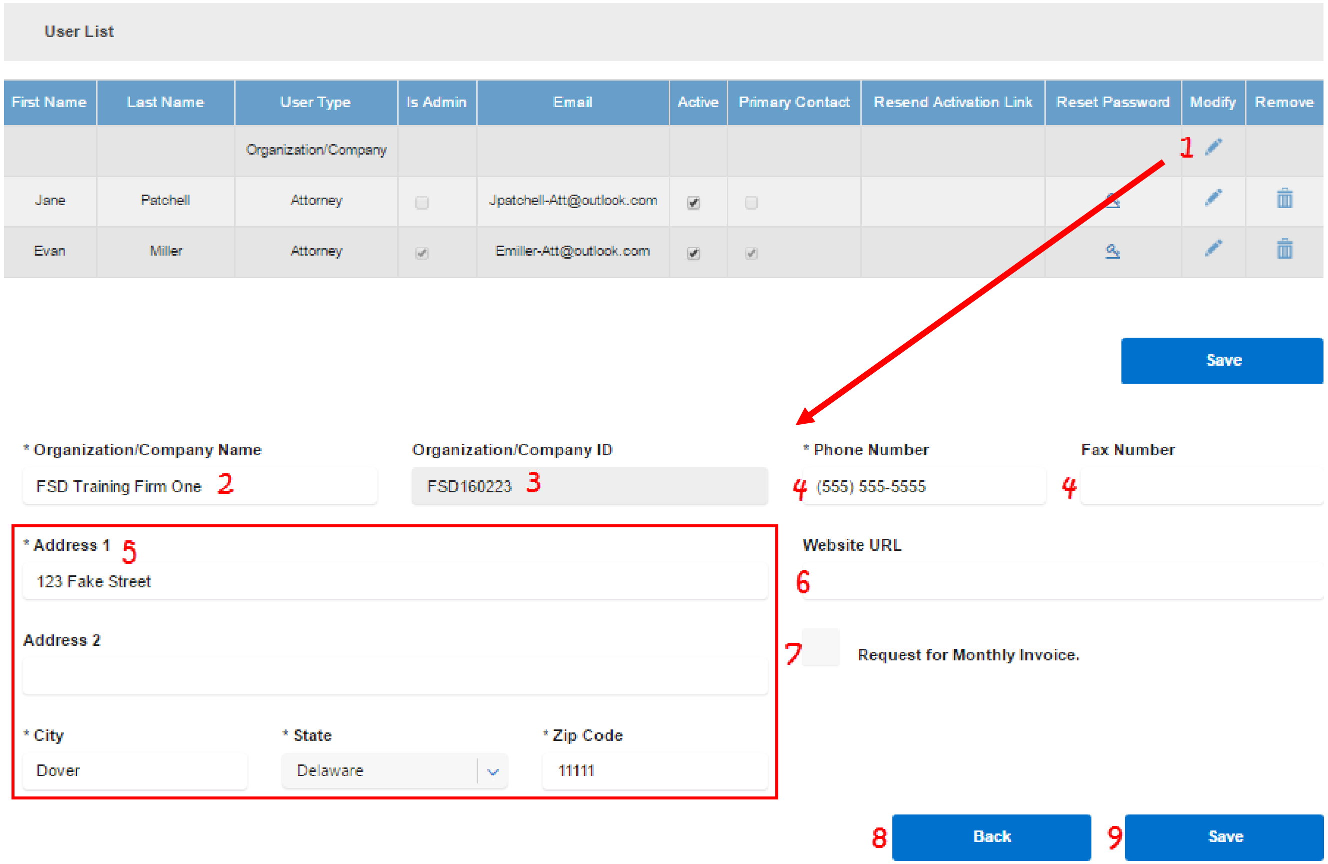
Adding A User

1. Using the dropdown menu, choose your user type: Attorney or Staff Member.



2. Enter the user's First Name, Last Name, and 6 digit Bar Number (If Attorney is the User Type)*.
3. Enter the user's address.
4. Select the checkbox if the user is an organization administrator.
5. Select the checkbox if the user is a primary contact**.
6. Enter the user's telephone number and optional fax number.
7. Enter and confirm the user's email address. This will be the user's User ID.
8. Click *Add User*.

Organization Administrator- Modifying Your Account



*When the account is first registered, the Organization ID will populate the registration confirmation and will also be sent to the Organization Administrator. This ID should be provided to any user that will be self-registering and wants to be added to your account.

Modifying Organization Information

1. Click the Pencil Icon in the *Organization/Company* row to make any or all of the following modifications to your account information.
2. Update Organization/Company name.
3. Identify Organization/Company ID*.
4. Update telephone number and optional fax number.
5. Update address.
6. Update website URL.
7. Click checkbox to request a monthly invoice.
8. Click *Back* to return to the Admin screen and discard your changes.
9. Click *Save* to save your modifications.

Organization Administrator- Modifying Users

User List

First Name	Last Name	User Type	Is Admin	Email	Active	Primary Contact	Billing Contact	Resend Activation Link	Reset Password	Modify	Remove
		Organization/Company									
Test Nicholas	Rodriguez	Attorney	1 ☑	jburnsfsx+DecemberAT@outlook.com 2	☑	☑ 3	☑ 4	5	6	7	8
Suzie	Paralegal	Staff Member	☑	jburnsfsx+DecemberStaff@outlook.com	☑	☐	☐				

9 Save

*The Link Icon will only appear for users that have not yet activated their accounts.
**Modifying a user's information is shown on the next page.
Note: Your Organization can have more than one Billing Contact (only designated if the Monthly Billing option is chosen when the account is registered), which may be helpful if your accounts payable duties are shared.

Modifying A User

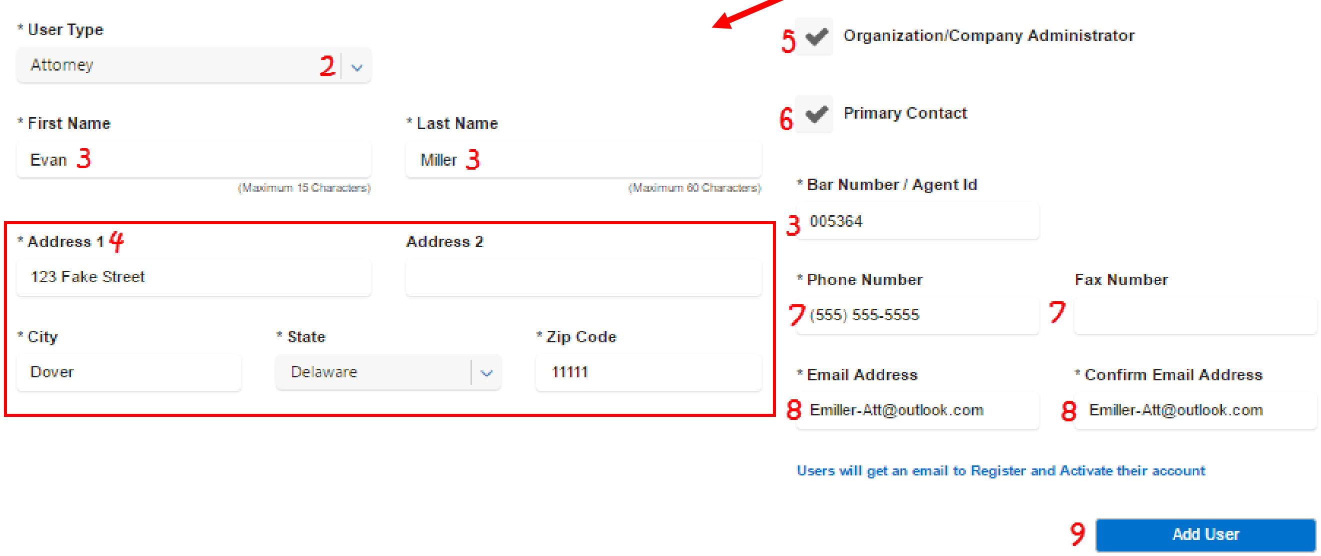
You will see a list of current users below the Add User field. Here you can:

1. View if a current user is an Organization Administrator.
2. Select the checkbox to activate a user account that you have added to the firm or that has joined the firm through self-registration.
3. View if a current user is a Primary Contact.
4. View if a current user is a Billing Contact
5. Click the Link icon to request that a user's Activation Link be resent to that user*.
6. Use the Key icon to reset a user's password for them.
7. Click on the Pencil icon to modify the user's information**.
8. Click the Trashcan icon to remove a user from File & Serve Delaware if they are no longer associated with your organization.
9. Click *Save* to save any changes to the *Active* column.

Organization Administrator- Modifying Users

User List

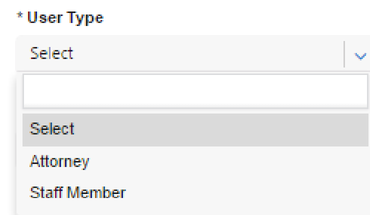
First Name	Last Name	User Type	Is Admin	Email	Active	Primary Contact	Resend Activation Link	Reset Password	Modify	Remove
		Organization/Company								
Jane	Patchell	Attorney	☐	Jpatchell-Att@outlook.com	☑	☐				
Evan	Miller	Attorney	☑	Emiller-Att@outlook.com	☑	☑			1	
Jerome	Gerome	Staff Member	☐	FSD_Filer1+1@outlook.com	☐	☐				



*For user type attorney, File & Serve Delaware (FSD) validates against Contexte (the State of Delaware Case Management System) by last name and bar number/Contexte ID. If you try to change the last name or Bar ID in FSD, it needs to be updated in Contexte first or it won't match and the validation will fail. To have the name or Bar ID updated in Contexte, it needs to first be updated in the DE Bar Association system which will then update Contexte.

Modifying A User's Information

1. Click on the Pencil icon to modify the user's information. This will open the *Add User* screen for that user.
2. Using the dropdown menu, choose your user type: Attorney or Staff Member.



3. Change the user's First Name, Last Name, and 6 digit Bar Number (If Attorney is the User Type*).
4. Change the user's address.
5. Select the checkbox if the user is an organization administrator.
6. Select the checkbox if the user is a primary contact.
7. Change the user's telephone number and optional fax number.
8. Change and confirm the user's email address. This will be the user's User ID.
9. Click *Add User* to save changes.

Organization Administrator- Activating/Deactivating Users

User List

First Name	Last Name	User Type	Is Admin	Email	Active	Primary Contact	Billing Contact	Resend Activation Link	Reset Password	Modify	Remove
		Organization/Company									
Test Staff	Secretary	Staff Member	☐	jburnsfsx+DecemberStaff3@outlook.com	☑	☐	☐				
Pam	Paralegal	Staff Member	☐	FSD_Filer3@outlook.com	1 ☑	☐	☐				

2 Save

Activating and Deactivating User That Joined Your Firm

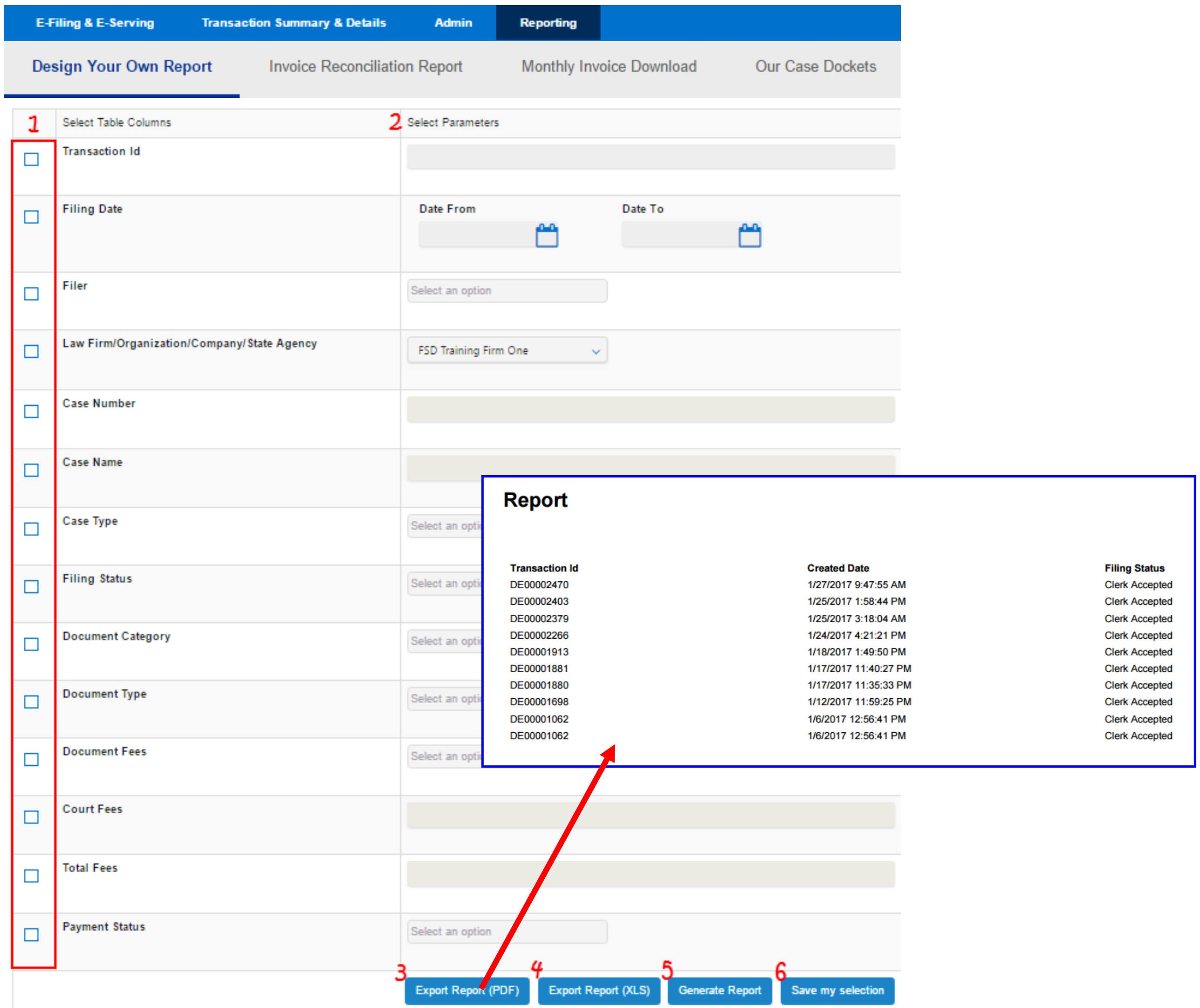
To activate a user that has joined your firm through registration or re-activate a user that has been deactivated

1. Click on the checkbox in the Active column.
2. Click *Save.*

To de-activate a user (e.g. they do not need to use the system for an extended period of time)

1. Click on the checkbox in the Active column.
2. Click *Save.*

Reporting



Design Your Own Report

1. Use check boxes select your report *Table Columns*.
2. Enter your *Parameters* for each selected Table Column.
3. Click *Export Report (PDF)* to save as a PDF.
4. Click Export Report (XLS) to save as an XLS.
5. Click *Generate Report* to view it in a web browser.
6. Click *Save my selection* to save current report selections to use for your next report.

Reporting

E-Filing & E-Serving | Transaction Summary & Details | Admin | Reporting

Design Your Own Report | **Invoice Reconciliation Report** | Monthly Invoice Download | Our Case Dockets

Date From 1

Date To 1

4 Export Report   5 Generate Report

Invoice number	Transaction Id	DocumentId	OrganizationId	Organization Name	Filed By	Filer Id	Filer Party	Filing Date & Time	Billing Reference	Court	Court Code	Court Location Name
INV0004444	DE00004444	4244	FSD160223	FSD Training Firm One	Evan Miller	2302	ROBERT RODRIGUEZ	1/19/2017 11:17:30 AM	Judge Review Test	Court of Common Pleas	CP	CCP - NEW CASTLE
INV0004427	DE00004427	4228	FSD160223	FSD Training Firm One	Evan Miller	2302	KENNETH CLARK	1/18/2017 10:40:13 AM	Judge Review Training	Court of Common Pleas	CP	CCP - SUSSEX
INV0004426	DE00004426	4225	FSD160223	FSD Training Firm One	Evan Miller	2302	ROSEMARY BEAUREGARD	1/18/2017 10:38:44 AM	Judge Review Training	Court of Common Pleas	CP	CCP - SUSSEX
INV0004426	DE00004426	4226	FSD160223	FSD Training Firm One	Evan Miller	2302	ROSEMARY BEAUREGARD	1/18/2017 10:38:44 AM	Judge Review Training	Court of Common Pleas	CP	CCP - SUSSEX
INV0004425	DE00004425	4223	FSD160223	FSD Training Firm One	Evan Miller	2302	CHARLES WELCH	1/18/2017 10:36:52 AM	Judge Review Training	Court of Common Pleas	CP	CCP - KENT
INV0004425	DE00004425	4224	FSD160223	FSD Training Firm One	Evan Miller	2302	CHARLES WELCH	1/18/2017 10:36:52 AM	Judge Review Training	Court of Common Pleas	CP	CCP - KENT

1 2 3 4 Next 2

3

Invoice Reconciliation Report

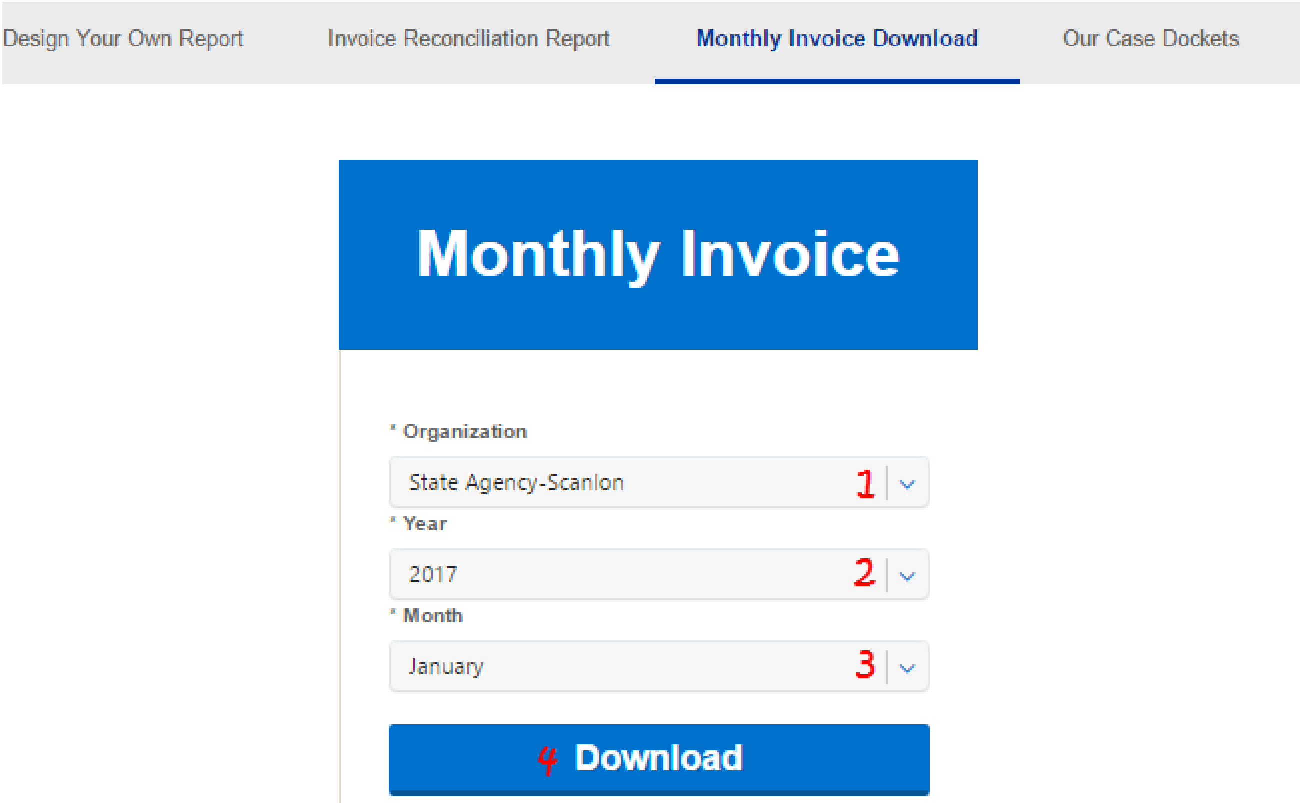
1. Click on Calendar Icons to select a date range.

« January 2017 »

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

2. Click on page numbers to choose a page to view and *Next* to move to the next page.
3. Use scroll bar to view hidden sections of the screen.
4. Click *Export Report* to save the report as a PDF.
5. Click *Generate Report* to view it in a web browser.

Reporting



Monthly Invoice Download*

1. Select *Organization*.
2. Select *Year*.
3. Select *Month*.
4. Click *Download*.

*This report is only available in organizations that have selected and been approved for Monthly Invoices. This selection will not appear on the menu bar for firms that pay by credit card.

Reporting

E-Filing & E-Serving | Transaction Summary & Details | Admin | Reporting

Design Your Own Report | Invoice Reconciliation Report | Monthly Invoice Download | Our Case Dockets

* Available Users

Evan Miller 1

2 Find Dockets

Court

Select 3

Case Number

4

Location

Select 5

Case Name

6

7 Apply Filter 8 Reset Filter

Court Name	Location Name	Case Number	Case Name
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001521	JAMES JAMESON VS DON DONALDS
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001523	ROBERT RODRIGUEZ VS HENRY HENDRICKS
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001528	JOHN WELCH VS CHRIS CHRISTIAN
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001529	ROBERT SURLES VS THOEDORE TED
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001530	CARL DANBERG VS JON JOHNSON
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001531	SHELDON RENNIE VS FRANK FRANKELSON
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001542	ROBERT RODRIGUEZ VS FRANK FRANKLES
Court of Common Pleas	CCP - KENT	CPU5-14-000210	SEED PRO INC VS THOMAS E MOORE INC
Court of Common Pleas	CCP - KENT	CPU5-17-000696	ROBERT ROBERTSON VS THEODORE TED
Court of Common Pleas	CCP - KENT	CPU5-17-000701	CHARLES WELCH VS GREG GREGORY

1 2 Next

*The report returns case information from Contexte (The State of DE's Case Management System) for courts that are currently active on File & Serve Delaware that the selected user is listed on.

Our Case Dockets

1. Use the drop down to select a user to run the report on.
2. Click *Find Dockets* to view the cases*.

Optional Filters

3. Select a Court.

Court

Select

Select

Court of Common Pleas

4. Enter a Case Number.
5. Select a location.

Location

Select

Select

CCP - KENT

CCP - NEW CASTLE

CCP - SUSSEX

6. Enter a Case Name.
7. Click *Apply Filter* to use your selected filters.
8. Click *Reset Filter* to return to the original page and remove filters.

Reporting

Court Name	Location Name	Case Number	Case Name
Court of Common Pleas	CCP - NEW CASTLE	1 CPU4-17-001521	JAMES JAMESON VS DON DONALDS
Court of Common Pleas	CCP - NEW CASTLE	CPU4-17-001523	ROBERT RODRIGUEZ VS HENRY HENDRICKS
Court of Common Pleas	CCP - KENT	CPU5-17-000698	ROBERT ROBERTSON VS THEODORE TED
Court of Common Pleas	CCP - KENT	CPU5-17-000701	CHARLES WELCH VS GREG GREGORY

2 1 2 Next

Case Summary for Case: CPU4-17-001521

JAMES JAMESON VS DON DONALDS

Case Information

Case Number:	CPU4-17-001521
Case Type:	DEBT
Opened :	01/13/2017 04:47:49 PM
Status :	NEW

Additional Information

Court :	COURT OF COMMON PLEAS
Location :	COURT OF COMMON PLEAS NC
Judge :	
Jury Status :	Non Jury

Show/Hide Full Case Caption

JAMES JAMESON VS DON DONALDS

Show/Hide Full Participants

File Date	Case History
01/13/2017 04:47:49 PM	DEBT FILED Filed by or in behalf of: EVAN MILLER 3 DEBT FILED PRAECIPE - SUMMONS - COMPLAINT - CERTIFICATE OF VALUE - EXHIBITS FILED FILING DATE 13-JAN-17 CLAIM VALUE 3500 INITIAL FILINGS - 01/13/2017 04:47:49 PM

4 Back

Our Case Dockets (continued)

1. Click on the *Case Number* to view the Case Summary Page/Complete Case Docket.
2. Click on page numbers to choose a page to view and *Next* to move to the next page.
3. Click on the *Document Title* link to view the document.
4. Click *Back* to return to the Our Case Dockets Page.