

File & Serve *Xpress*™

**Batch Document
Processor -
User Guide**



File & ServeXpress

Batch Document Processor

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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** <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.

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 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.

Other: -- Select --

Choose an action: Remove from list Download documents **Print documents** Purchase documents Add to Custom Document List Go Show records

1-6 of 6 transactions <<Prev Page 1 of 1 Next>>


<input type="checkbox"/>	Transaction	△ Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Size
<input checked="" type="checkbox"/>	37658470	5/18/2011 11:13 AM MDT	CO Mock County District Court	2011CV518 Johson, Joseph vs. City of Springfield, et. al.	Max Powers, Mock Appeals Firm B-Demo	<input checked="" type="checkbox"/>	Complaint and Jury Demand	Complaint and Jury Demand [view] • Linked to (1)	0.1MB
						<input checked="" type="checkbox"/>	Civil Case Cover Sheet	Civil Case Cover Sheet [view]	0.1MB
						<input checked="" type="checkbox"/>	Filing Other	Exhibit A, pages 1-4. Exhibit B, pages 5-7. [view]	0.1MB
<input checked="" type="checkbox"/>	37891466	6/1/2011 10:29 AM MDT	CO Mock Court of Appeals (Court Demo Only)	Aspen Leaf Landscaping vs. Smith, Harry	Max Powers, Mock Appeals Firm B-Demo	<input checked="" type="checkbox"/>	Notice of Appeal (COA)	Notice of Appeal [view]	0.1MB
						<input checked="" type="checkbox"/>	Exhibit (COA)	Exhibit A [view]	0.1MB

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.

- 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).

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:

5 document(s) are [available](#) 

Available Documents						
Show 10 records						
1-5 of 5 Available Documents						
Date	Document Title	Transaction ID	Document Type	Court	Case Number	Case Name
5/18/2011 11:13 AM MDT	Complaint and Jury Demand	37658470	Complaint and Jury Demand	CO Mock County District Court	2011CV518	Johson, Joseph vs. City of Springfield, et. al.
5/18/2011 11:13 AM MDT	Civil Case Cover Sheet	37658470	Civil Case Cover Sheet	CO Mock County District Court	2011CV518	Johson, Joseph vs. City of Springfield, et. al.
5/18/2011 11:13 AM MDT	Exhibit A, pages 1-4. Exhibit B, pages 5-7.	37658470	Filing Other	CO Mock County District Court	2011CV518	Johson, Joseph vs. City of Springfield, et. al.
6/1/2011 10:29 AM MDT	Notice of Appeal	37891466	Notice of Appeal (COA)	CO Mock Court of Appeals (Court Demo Only)		Aspen Leaf Landscaping vs. Smith, Harry
6/1/2011 10:29 AM MDT	Exhibit A	37891466	Exhibit (COA)	CO Mock Court of Appeals (Court Demo Only)		Aspen Leaf Landscaping vs. Smith, Harry
1-5 of 5 Available Documents						

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: **20150120152414**. 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.

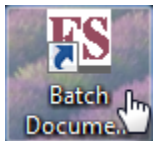
Saved Batch Jobs		
Show 50 records		
Job Number	Document Count	Date Created
20150120152414	5	1/20/2015 3:24 PM EST



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.

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.



Sign On
File & ServeXpress™

User Name:

Password:

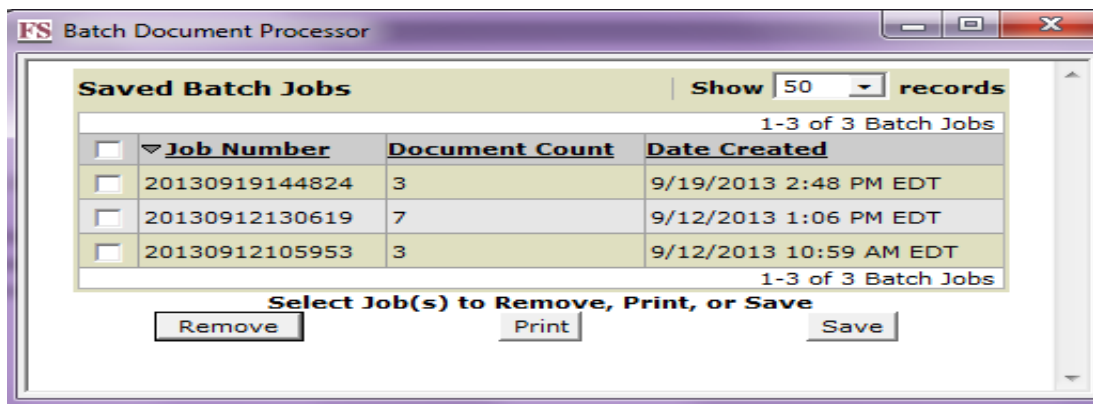
Sign On

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 support@fileandservexpress.com

Batch Document Processor Tips

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

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

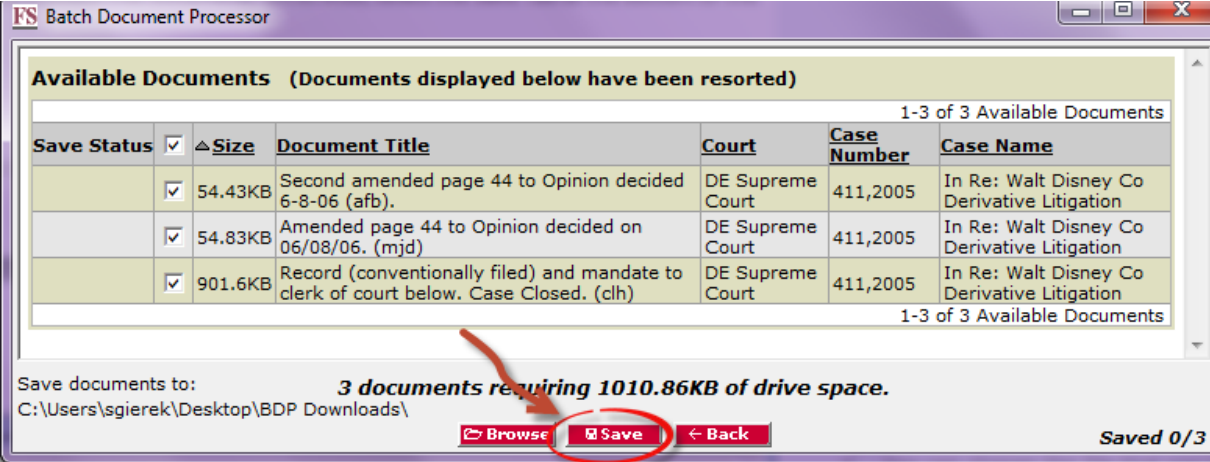


Last Updated: 2/3/2017

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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.



The screenshot shows the 'Batch Document Processor' window. It features a table of 'Available Documents' with columns for 'Save Status', 'Size', 'Document Title', 'Court', 'Case Number', and 'Case Name'. Three documents are listed, all with checked 'Save Status' boxes. Below the table, a message states '3 documents requiring 1010.86KB of drive space.' At the bottom, there are 'Browse', 'Save', and 'Back' buttons. The 'Save' button is circled in red, and a red arrow points to it from the table area. The status 'Saved 0/3' is shown in the bottom right corner.

Save Status	Size	Document Title	Court	Case Number	Case Name
<input checked="" type="checkbox"/>	54.43KB	Second amended page 44 to Opinion decided 6-8-06 (afb).	DE Supreme Court	411,2005	In Re: Walt Disney Co Derivative Litigation
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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

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.

The screenshot shows the 'Batch Document Processor' window. At the top, it says 'Available Documents' and '1-3 of 3 Available Documents'. Below this is a table with the following columns: Print Status, Copies, Date, Document Title, Pages, Transaction ID, Document Type, Court, Case Number, and Case Name. Two documents are listed, both with 'Print Status' checked and 'Copies' set to 1. A red arrow points from the 'Print' button at the bottom to the 'Print Status' column of the first document. The 'Print' button is circled in red.

Print Status	Copies	Date	Document Title	Pages	Transaction ID	Document Type	Court	Case Number	Case Name
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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

Add Cover Sheet
Print to Default Printer: HP Photosmart C4700 series
3 documents selected for printing.
Print < Back
Documents printed 0/3