



File & Serve *Xpress*<sup>™</sup>

# **Bulk Filing Support Tool**

User Guide

## Bulk Filing Support Tool

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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

# Bulk Filing Support Tool Overview

Below are instructions on how to use the new File & ServeXpress Bulk Filing Support Tool as well as highlights of its features and reporting capabilities. The information reported in this web application is available directly to the firm through the “GetFilingBatchStatus” call of the Bulk Filing transfer system. Such information can be imported directly into your own case management system. This tool, however, should allow any user to see that information without any calling or importing of data.

## Accessing the Bulk Filing Support Tool

Access the Bulk Filing Support Tool at the following website address:

<https://bulkfiling.fileandservexpress.com/BulkFiling/Support/Login.aspx>

To log in, enter your File & ServeXpress username and password and then click the “Login” button:

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**Login:**

Username:

Password:

Login

Once logged in, the Home tab will appear.

## Bulk Filing Support Tool Tips:

- ✓ Within the Bulk Filing tool, the words ‘Filing’ and ‘Filing ID’ refer to ‘Transaction and ‘Transaction ID’ as they are used within File & ServeXpress.
- ✓ When logging into the Bulk Filing Support Tool, unless you are the administrator for your account, use the login credentials of the person submitting the batch for your firm, otherwise you will not be able to download or open transactions.

# The Home Tab

The Home Tab is the main screen in the Bulk Filing Support Tool and is very versatile. It allows the user to display a list of all batches the current logged in user has submitted and if the user is an administrator, it will allow the user to see all batches for their firm.

## The Home Tab:

Actions	Batch ID	Queue Position	Batch Status	Date Submitted	Authorized
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	11000	N/A	ClerkReviewed	5/30/2007 8:13:37 PM	5/31/2007 8:05:47 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	10999	N/A	ClerkReviewed	5/30/2007 8:06:18 PM	6/18/2007 1:48:19 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	10034	N/A	ClerkReviewed	4/7/2007 2:51:09 PM	4/7/2007 2:52:28 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	10033	N/A	ClerkReviewed	4/7/2007 2:50:09 PM	4/7/2007 2:52:12 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	3462	N/A	Cancelled	10/14/2006 3:21:29 PM	NOT AUTHORIZED
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1180	N/A	ClerkReviewed	6/21/2006 1:22:53 AM	6/21/2006 1:30:11 AM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1179	N/A	ClerkReviewed	6/21/2006 1:22:27 AM	6/21/2006 1:30:03 AM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1170	N/A	ClerkReviewed	6/20/2006 11:34:14 PM	6/20/2006 11:35:29 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1169	N/A	ClerkReviewed	6/20/2006 11:25:16 PM	6/20/2006 11:34:40 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1030	N/A	Submitted	5/13/2006 4:51:08 PM	5/13/2006 6:22:58 PM
<a href="#">Details</a>   <a href="#">Open File</a>   <a href="#">Download File</a>	1029	N/A	Submitted	5/13/2006 4:51:07 PM	5/13/2006 6:34:21 PM

## Bulk Filing Support Tool Tips:

Batch Status column definitions:

- ✓ **Submitted** - This is the status assigned to newly submitted filings, and indicates they are queued for processing.
- ✓ **In Process** – The filing is currently being processed by the system.
- ✓ **Failed** – Batch has failed and File & ServeXpress internal triage will attempt to correct the problem, at which time the filing will be promoted to Complete, Documents Pending.

The Home Tab contains a great deal of useful information. For instance:

- » The user can go directly to the details of a particular batch by typing in a single batch id at the top, left hand side of the screen and hitting the search button.
- » The **Status Filter** allows the user to narrow the Batch List to a particular status (such as: Pending Upload, Initialized, Processing, Submitted, Failed, Pending Authorization, Processing Authorization, Cancelled, and Clerk Reviewed).
- » **Queue Position** column: If any batches are queued it will tell you what overall position in the Clerk's queue they are at (batches from all bulk filers) and will display 1st in Queue, 2nd in Queue, etc...
- » Clicking the "**Details**" link under the **Action** column in the row of the Batch you are interested in will allow the user to drill down into the details of that batch.
- » Sort the **Batch List** by clicking on the header for Batch ID, Queue Position, Batch Status, Date Submitted and Authorized date/time. Clicking on the header once will sort the column numerically, chronologically or alphabetically. Clicking on that header the second time will sort the list in reverse numerical, reverse chronological or reverse alphabetical order.

## Bulk Filing Support Tool Tips:

Batch Status column definitions:

- ✓ **Complete, Documents Pending** – The batch has been processed and filed with the court and is visible to the court through the application but the documents are pending Clerk Review (ie Acceptance or Rejection by Court).
- ✓ **Complete, All Documents Reviewed** – Filed with the court and reviewed by the court.

# The Batch Details Screen

The Batch Details Screen has two main areas: the Batch Details area and the Filings area. The Batch Details area gives detailed information about the batch, as a whole. The Filings area gives detailed information about each transaction within the batch.

The screenshot shows the Batch Details screen with a navigation bar at the top containing links like Home, My Profile, Find a Court Policy, Upload a New Batch, Debug an XML File, and Support / Contact Us. The user is logged in as 'Qa Bing'. The main content area is titled 'Batch Details' and includes a 'Go Back' link. Below this, there are several key-value pairs for batch information:

ID:	11000	Court:	Mock Courthouse
Status:	ClerkReviewed	Organization:	QA Firm D
Date Submitted:	5/30/2007 8:13:37 PM	Date Authorized:	5/31/2007 8:05:47 PM
Calendar Event Date:	N/A	Statutory Fees:	\$36.00
Description 1:	Automated Test		
Description 2:	Automation loading Opf transaction, in QA, using I		
Description 3:	Automation test using Credentials of bing, qa		

Below the metadata is a 'Filings' section with a table listing individual transactions:

Filing ID	Case ID	Case Name	Case Number	Statutory Fees	OPF	File To Court	Review Date	Status
<a href="#">14575887</a>	<a href="#">1415750</a>	BulkFiling Asbestos 1	AUTO181POSTFIX	\$0.00	Yes	Yes	5/7/2007 6:10:17 PM	Complete, All Documents Reviewed
<a href="#">14575888</a>	<a href="#">1415751</a>	BulkFiling Probate Test 2	AUTO182POSTFIX	\$36.00	Yes	Yes	5/30/2007 8:13:00 PM	Complete, All Documents Reviewed

Specifically, the Batch Details Screen provides the following information:

- » Lists Case Numbers for all transactions that have been Clerk Reviewed and assigned case numbers. The Case Numbers column is sortable.
- » Lists individual transactions within the batch and important information regarding the individual transactions.
- » Open and/or download files hyperlinks. This is also possible from the Home Screen.

## Bulk Filing Support Tool Tips:

Here are some additional details on the information located Batch Details screen:

- ✓ The “Date Authorized” area (located in the Batch Details information area) records when your transactions were filed;
- ✓ The total statutory fees for the entire batch are found in the Batch Details information area;
- ✓ The “Review Date” column (in the Filings area) records when your transactions were reviewed by the Court Clerk;
- ✓ Individual statutory fees for each individual transaction can be found in the “Statutory Fees” column in the Filings area of the page;
- ✓ If you have created custom description fields in your xml, the information can be found in the 3 Description fields in the Batch Details area of the page.

For further billing reporting in the File & ServeXpress Billing report, File & ServeXpress recommends sending a billing reference with your batch using the “MatterID” filed in their xml.

- » Within the file contents window you can debug an xml document (if there is an error in the xml).
- » Further details of individual transactions within the Batch can be found by clicking on the hyperlinked Transaction ID Number under the “Filing ID” column.

The Filing Details screen looks like this:

Filing Details			
<b>ID:</b>	14575887	<b>Case ID:</b>	0
<b>Filing Date:</b>	5/31/2007 8:05:47 PM	<b>Review Date:</b>	6/7/2007 6:10:17 PM
<b>Scheduled Date:</b>	5/31/2007 8:05:47 PM	<b>Status:</b>	Complete, All Documents Reviewed
<b>Is OPF:</b>	Yes	<b>File To Court:</b>	Yes
<b>Filer:</b>	Qa Bing	<b>Filer Organization:</b>	QA Firm D
<b>Authorizer:</b>	Qa Bing	<b>Authorizer Organization:</b>	QA Firm D
<b>Filer Note:</b>			

[Close Window](#)

### Bulk Filing Support Tool Tips:

- ✓ For further billing reporting in the File & ServeXpress Billing report, File & ServeXpress recommends sending a billing reference with your batch using the “MatterID” filed in their xml.
- ✓ The user can click on the “Case ID” link to get more detailed information on the case – including case number, case type, etc...
- ✓ If the Open File and Download File hyperlinks are disabled, it means that either the batch no longer exists physically on the File & ServeXpress servers, or that the batch was submitted under another user’s ID (assuming that the user that is logged in is not an administrator of the account). Otherwise, you can download the original file (zipped) or open the file to view it’s contents.

## **My Profile Tab:**

- » Displays the logged in user's information.
- » Displays the logged in user's organization information.
- » Displays all organization users for the organization with phone/email and type of user.

## **Find a Court Policy tab:**

- » Contains a "drill down" method to find specific details on what's available for the court.
- » Provides the capability to find codes for relationships and roles.
- » Provides the capability to find different case classifications and whether or not they are available for new case or existing case filings.

## **Upload a New Batch tab:**

- » Allows the user to submit a new batch
- » File size should be small < 10MB

## **Debug an XML File tab:**

- » This will allow you to see errors in a single filing xml and will give you the exact line number and description of the error.
- » Hover your mouse over the highlighted area to see the error details.

## **Support / Contact Us tab:**

- » Contains links to different contact methods and support options;
- » Client Support can be reached 24/7 at 1.888.529.7587