File & Serve*Xpress*

Document Upload
User Guide

File & Serve *Xpress*™

# File & Serve*Xpress*

Document Upload

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File & Serve 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 & Serve Resource Center** is available within File & Serve by clicking on the Resource Center link at the top, right hand side of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!

- **File & Serve Login Page** www.fileandservexpress.com is where you can find password help, what's new and any important information like scheduled maintenance or system changes.

- **File & Serve Notices** is an information page that is available on the bottom, left-hand side of the File & Serve Home tab, once you sign into File & Serve. 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.

Document Upload Overview

All law firm users have access to the **Document Upload** feature, which is available in the Toolbox section of the File & Serve home page.
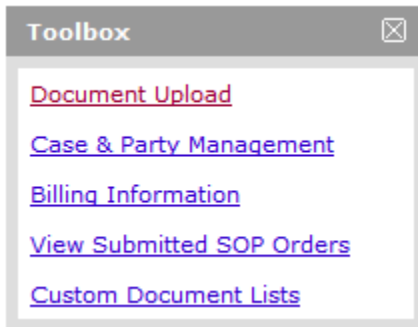
This feature gives firms the ability to upload "private" documents that are related to the case but are not already a part of the electronic case history so that firms can have access to them via File & Serve.

All documents uploaded using this feature are only viewable by the uploading firm. **Document Upload** will be beneficial to firms that would like to use File & Serve as a document management system or would like to have a truly "complete" online case file.

Document Upload

Document Upload

Upload a document for your organization.

* Required fields

Case Information:

Select a Jurisdiction and Court and enter Case Number information. Click **Find Case** to search and select a case.

* Jurisdiction: | Colorado ▼

* Court: | CO Mock County District Court ▼

* Case Number: [i] | contains ▼ | 2011CV1 | **Find Case**

Cancel | **Submit Document**

1. Click the **Document Upload** link.
2. Use the drop down menus and open field to select ***Jurisdiction (State), Court and Case Number*** for which you would like to upload a document.
3. Click the "Find Case" Button.

○	2011CV1125 Bank of the West vs Amanda Carlson	Active
●	2011CV1118 Alpine Contractors vs CO Construction Co	Active
	1-10 of 10 Cases <<Prev Page 1 of 1 Next>>	
		Select Case

4. Choose the radio button next to the correct case and click the "Select Case" button.

a. The system will only display search results based upon whether the organization is either an active case participant or had been a case participant.
b. If a firm has been withdrawn or dismissed from a case on File & Serve, they will still be able to upload documents into that case if desired.

	Party	Type	Status	Attorney	Firm
	N/A	N/A	Active	District, Judge	CO Mock County District Court
	CO Construction Co	Defendant	Active	Pro Se	Pro Se-
	Alpine Contractors	Plaintiff	Active	Payne, Justin	Mock Appeals Firm A-Demo

Sending Party:

5. Use the Radio Buttons to choose a "Sending Party" to designate the party of which the document is attributed to.

Document Details:

Enter the document details below.

* Date Filed:	5/1/2012 (mm/dd/yyyy) 10:26 AM (hh:mm AM/PM) MDT
* Document Type:	Responses to Requests for Admission
* Document Security:	Private Upload
	Private Upload documents are only available to users in the uploader's organization.
* Document Title:	Responses to Requests for Admission
	Maximum text length is 510 characters
* New Document:	Click **Browse** to select a file from your computer or network and then click **Attach Document** to upload
	Browse...
	Attach Document
	Uploaded File: D:\Documents and Settings\rodrigrj\Desktop\sample Motion.doc [remove]

Document Upload Fee: $1.00

Billing Reference: [ ]

To learn more about using this feature visit the Resource Center page.

Cancel   Submit Document

6. Enter a date (the system will default to the current date and time, but the user can post-date the document – you cannot enter a future date).
7. Select a Document Type.
8. The Document Security on this feature is a default of "*Private Upload*" – the user cannot override that default.
9. Enter a Document Title to describe the document.
10. Browse your personal hard drive for the document to upload.
11. Click "Attach Document".
12. Enter a Billing Reference.
13. Click "Submit Document".
14. After the document is uploaded to the system, the user will receive a transaction receipt (screenshot on following page).

Document Upload Tips:

✓ **Document Type:** this drop-down menu will contain the full list of document types enabled for the court and case that is selected, allowing users to designate a document type that is normally a Court-issued document.

✓ **Document Security- Private Upload:** Private Upload documents are only available to users in the uploader's organization.

✓ **Billing Reference:** If a Billing Reference is entered it will appear on the firm's monthly invoice. The Billing Reference fee can be set as mandatory for the firm through the Organization Administrator's Preferences section.

✓ **Replacing a Document:** If the incorrect document is selected, click on the [remove] link to choose a different document.

✓ **Size Limitations:** There is no limit to the size of documents that can be uploaded using the Document Upload feature.

Your document has been successfully uploaded to LexisNexis File & Serve.

To perform another transaction, click **Upload Another Document.**
To exit, click **Return to Home.**

Details:

Authorized by:	Payne, Justin
Submitted by:	Payne, Justin
Court:	CO Mock County District Court
Case:	2011CV1118 Alpine Contractors vs CO Construction Co
Filed On:	5/1/2012 10:26 AM MDT
Filing Option:	Document Upload

New Document:

Document ID:	48182506
Document Type:	Responses to Requests for Admission
Document Security:	Private Upload
Document Title:	Responses to Requests for Admission [view]
Transaction ID:	44065775

Sending Party:

Party:	Alpine Contractors
Type:	Plaintiff
Status:	Active
Attorney:	Payne, Justin
Organization:	Mock Appeals Firm A-Demo

Return to Home   **Upload Another Document**

Last Updated: Tuesday, December 18, 2012

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Searching for "Document Upload" Documents

Because Document Upload transactions are private to the uploading organization, only that organization can view these transactions on the system. While Document Upload transactions can be viewed through any of the Searches on File & Serve, the Case History search is the only one that has a specific radio button filter that allows the organization to view only their uploaded documents or all documents (including the Document Upload Transactions). Selecting this radio button will only provide "Document Upload" documents in the search results.

By selecting "All Documents" as the Transaction Option in Case History, the user will be able to see the entire docket including "Document Upload" transactions.

Transaction	Date/Time	Option	Case Number / Case Name	Authorizer / Organization	Document Type	Document Title	Size
44065775	5/1/2012 10:26 AM MDT	Document Upload	2011CV1118 Alpine Contractors vs CO Construction Co	Justin Payne, Mock Appeals Firm A-Demo	Responses to Requests for Admission	Responses to Requests for Admission [view]	0.1MB
40971803	11/18/2011 1:53 PM MST	File Only	2011CV1118 Alpine Contractors vs CO Construction Co	Justin Payne, Mock Appeals Firm A-Demo	Response to Motion to Dismiss	Response to defendant's motion to dismiss [view]	0.1MB
40963644	11/18/2011 10:21 AM MST	File And Serve	2011CV1118 Alpine Contractors vs CO Construction Co	Max Powers, Mock Appeals Firm B-Demo	Entry of Appearance	Entry of appearance [view]	0.1MB
40958336	11/18/2011 7:23 AM MST	File And Serve	2011CV1118 Alpine Contractors vs CO Construction Co	Max Powers, Mock Appeals Firm B-Demo	Motion to Dismiss	Motion to Dismiss Complaint [view]	0.1MB
40958280	11/18/2011 7:14 AM MST	File Only	2011CV1118 Alpine Contractors vs CO Construction Co	Justin Payne, Mock Appeals Firm A-Demo	Complaint and Jury Demand	Complaint and Jury Demand Filed on Behalf of Plaintiff Alpine Contractors [view]	0.1MB
					Civil Case Cover Sheet	Civil Case Cover Sheet [view]	0.1MB
					Filing Other	Exhibit A to Complaint [view]	0.1MB

Document Upload Tips:

✓ **Multiple Cases/Documents:** Documents can only be uploaded into one case at a time.

The feature also only allows the user to upload one document at a time.

There is no option to upload the same document into multiple cases.

✓ **Availibility Limitations:** The Document Upload feature is not available to Third Party Filers as they are not considered activate case participants.