File & Serve*Xpress*

Tracked Items
User Guide

File & Serve *Xpress*™

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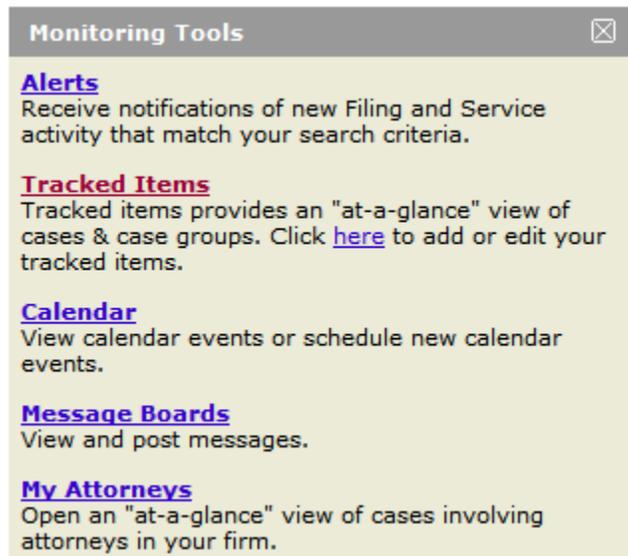
Tracked Items

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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.

Tracked Items Overview

The **Tracked Items** feature is a monitoring tool that allows users to track specific cases from their home page. **Tracked Items** is accessible on the File & Serve homepage in the monitoring tools box.

Click on the **Tracked Items** hyperlink to view your cases. From this page you can **File & Serve** into your selected cases, view the case history and party information, and check for newly received, recently filed and rejected documents. You may also view any new Alerts you have set for that particular case.

✓ **Functions:** automated case management tool that provides an alphabetic "File Cabinet" view of your cases with hyperlinks to save time when e-filing, e-serving, and accessing case information.

✓ **Pricing:** Tracked Items is a **complimentary** case management tool provided to Users by File & Serve.

Tracked Items

Tracked Items Tips:

1. To file directly into one of your tracked cases click the check **File & Serve** hyperlink in the furthest column to the right for the case. This link will take you directly to the **File & Serve – Documents** tab by bypassing the Filing & Service tab **Filing & Service** .

2. To view new rejected items, click the **View** hyperlink in the **Rejected Documents** column for the respective case.

3. To view new sent items, click the **View** hyperlink in the **Sent Items** column for the respective case.

4. To view new inbox items, click the **View** hyperlink in the **Inbox** column for the respective case.

5. To view the **Case History** (all transactions in that case), click the **Case Number** hyperlink.

6. To sort the Court column, click the **Court** hyperlink in the top row.

✓ **"View" hyperlink:** if there is no **View** hyperlink in any respective column. There are no new items to view for the respective case.

✓ **Column Headers:** all columns and the information therein can be added and deleted from Tracked Items at the user's discretion. Please see below for more information on this function.

Tracked Items Setup

To begin tracking cases, click the Click here hyperlink on the File & Serve homepage under the Tracked Items description. Please note that you can also access the set up page by clicking on the Tracking Setup hyperlink on the Tracked Items page.

1. Select which data items you would like to display for your tracked items: Save   Cancel
   - ☑ Case Name or Case Group Name
   - ☑ Case number
   - ☑ Court name
   - ☑ Case History Link
   - ☑ Inbox
   - ☑ Sent Items
   - ☑ Rejected Documents
   - ☐ Alerts
   - ☑ File & Serve Link

1. To choose which columns you want displayed for the cases you are tracking. Select the columns by clicking the check box for the available column. Click the **Save** button.

2. Select the case(s) or group(s) you would like to show up on Tracked Items

Find Items | **Selected Items**

* **Jurisdiction:** Colorado

Court: CO Mock County District Court

- All Cases
- My Cases
- Firm Cases
- Case Groups in Court

Case number [ ]

Case name: [ ]

Find

2. To retrieve a list of cases in which you are directly involved, select a court from the drop-down menu, click the **My Cases** radio button, and then click **Find.** All cases in which you are involved in that court will appear.

3. To select the cases you want to track, click the check box by the case name, then click the Add Tracked Item(s) button. If you wish to choose all of the cases, place a checkmark in the checkbox on the gray header bar (screenshot on next page). The case will be added to the list of cases on your **Tracked Items** screen.
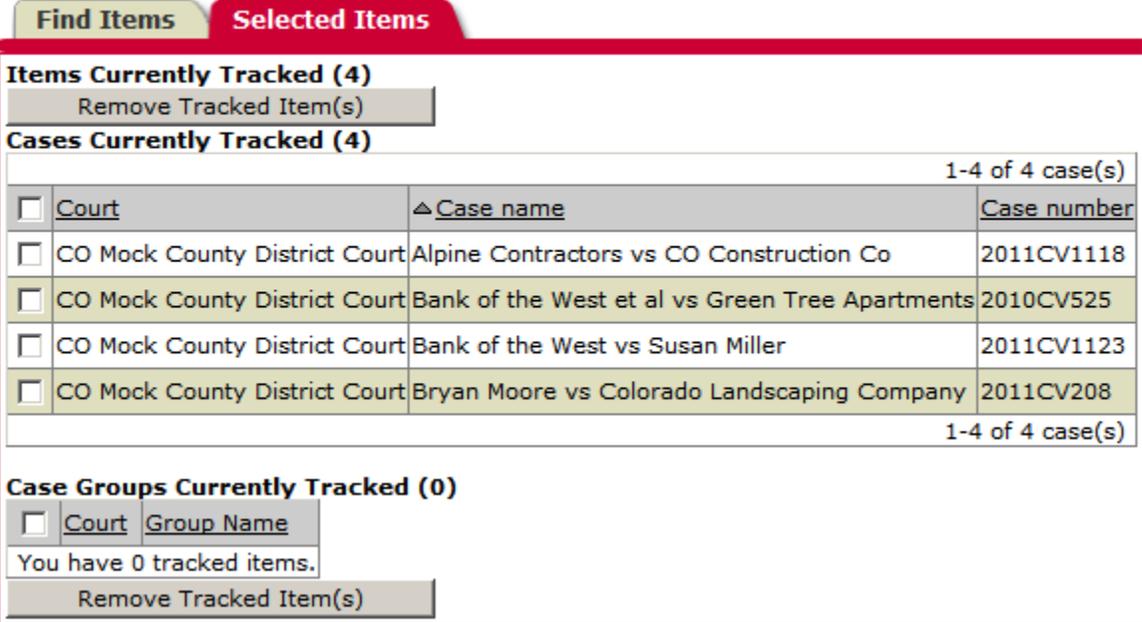
Add Tracked Item(s)		

		1-9 of 9 case(s)
☐ Court	⏶ Case name	Case number
☐ CO Mock County District Court	Aspen Lawn Care vs Fletcher, Douglas	09cv9165
☑ CO Mock County District Court	Bank of the Rockies vs Chris Patton	2009cv31209
☑ CO Mock County District Court	Countrywide Homes vs McCarthy, Michael & Denise	2008CV237
☑ CO Mock County District Court	Johson, Joseph vs. City of Springfield, et. al.	2011CV518
☐ CO Mock County District Court	me vs you	2010cv66
☐ CO Mock County District Court	Patty Delmar vs Joe's Garage	2008CV8765
☐ CO Mock County District Court	Sir Rents Alot vs Gregory, Thomas	2010CV123467
☐ CO Mock County District Court	Sir Rents Alot vs John John Mac	2009CV30409
☐ CO Mock County District Court	Triple D Collections vs Michaels, Jefferey	2010CV6636
		1-9 of 9 case(s)

Add Tracked Item(s)		

4. To retrieve a list of cases in which all attorneys at your firm are involved, select a court from the drop-down box and click the ⦿ Firm Cases radio button and click **Find**. All cases in which attorneys at your firm are involved will appear.

5. You may choose to select cases to track individually or track cases in which your firm is not directly participating by selecting the **Court Name** from the drop down menu, selecting the ⦿ All Cases radio button.

6. Users may also search for a case by entering a **Case Name** or **Case Number** then clicking **Find.**

7. Once the list of cases appears, to select the cases you want to track, click the check box by the case name, then click the ｜ Add Tracked Item(s) ｜ button. If you wish to choose all of the cases, place a checkmark in the checkbox on the gray header bar. The case will be added to the list of cases on your **Tracked Items** screen.

Managing Tracked Items

Once you have created a list of cases to track on your home page, they will remain there until you remove them. From the **Selected Items** tab of the **Tracking Setup** page, you can remove **Tracked Items** you are no longer interested in Tracking.

2. Select the case(s) or group(s) you would like to show up on Tracked Items:

Find Items	**Selected Items**

Items Currently Tracked (4)

Remove Tracked Item(s)

Cases Currently Tracked (4)

			1-4 of 4 case(s)
☐	Court	△ Case name	Case number
☐	CO Mock County District Court	Alpine Contractors vs CO Construction Co	2011CV1118
☐	CO Mock County District Court	Bank of the West et al vs Green Tree Apartments	2010CV525
☐	CO Mock County District Court	Bank of the West vs Susan Miller	2011CV1123
☐	CO Mock County District Court	Bryan Moore vs Colorado Landscaping Company	2011CV208
			1-4 of 4 case(s)

Case Groups Currently Tracked (0)

☐	Court	Group Name

You have 0 tracked items.

Remove Tracked Item(s)

1. From the **Tracking Setup** link on the **Tracked Items** page, scroll down to option # 2.
2. Click on the tab for **Selected Items**.
3. A list of all **Tracked Items** will appear. Place a checkmark next to the case/case group you wish to remove from your **Tracked Items** and click the **Remove Tracked Items** button. This will remove the case/case group from your **Tracked Items** list.

Tracked Items Tips:

✓ **Tracking Cases A Firm is Not Involved In:** If you are tracking a case that you or an attorney at your firm is not involved in, you will still be able to view the list of all transactions in a case. However, you will be charged research fees to view the docket and documents.