



File & Serve*Xpress*

Batch Document Processor
User Guide

File & Serve*Xpress*[™]

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Batch Document Processor

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File & Serve 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 & 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.

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 & Serve (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".

The screenshot shows the Batch Document Processor interface. At the top, there are tabs for Home, Filing & Service, Alerts, Search, and Service of Process. Below the tabs, the breadcrumb "Home > Inbox" is visible. A message states: "The following documents were served on you or forwarded to you." Below this, there is a table of transactions. The table has columns for Transaction, Case Number, Case Name, Authorizer Organization, Document Type, Document Title, and Size. The first transaction is 11845436, dated 7/7/2006, with Case Name "Jones vs Car Manufacturers Corp et al" and Document Type "Motion for hearing". The second transaction is 11845431, dated 7/20/2006, with Case Name "Jones vs Car" and Document Type "Motion for hearing". Above the table, there is a "Choose an action:" dropdown menu with options: "Mark as read", "Print documents", "Purchase documents", "Download documents", "Remove from list", and "Select". The "Download documents" option is highlighted. To the right of the dropdown is a "Go" button. There are also radio buttons for "Unread", "Read", and "All", and checkboxes for "Main documents only" and "Main and supporting documents". The table shows 1-50 of 293 transactions, with pagination links for "Prev", "Page 1 of 6", and "Next".

Batch Document Processor Tips

- ✓ You will need to have the Batch Document Processor 3.0 installed in order to retrieve your documents.
- ✓ If you do not have the Batch Document Processor 3.0 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.

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.

File & Serve 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:

2 document(s) require purchase ?

Documents Available With Purchase Show records

1-2 of 2 Documents Available With Purchase

<input type="checkbox"/>	<u>Date</u>	<u>Price</u>	<u>Document Title</u>	<u>Transaction ID</u>	<u>Document Type</u>	<u>Court</u>	<u>Case Number</u>	<u>Case Name</u>
<input type="checkbox"/>	11/17/2004 12:57 PM EST	\$7.50	Hercules Incorporated v. OneBeacon America Inc. Co. et al. So ordered from Del Pesco, J. from joint stipulation of Pltf. hercules Inc. and Certain Deft's. to dismiss certain deft's.	4624587	Order	DE Superior Court-New Castle County	02C-11-237 SCD	Hercules Inc vs OneBeacon America Insurance Co et al
<input type="checkbox"/>	11/2/2004 3:46 PM EST	\$7.50	Joint Stipulation of Plaintiff Hercules Incorporated and Certain Defendants to Dismiss Certain Defendants	4530025	Stipulation of Dismissal Civil Rule 41(a)(1)	DE Superior Court-New Castle County	02C-11-237 SCD	Hercules Inc vs OneBeacon America Insurance Co et al

1-2 of 2 Documents Available With Purchase

Billing Reference: **Purchase**

3. Select the "Create Job" button at the bottom of the refreshed screen.

We have conducted a security check of your rights to the documents you have selected. We have found the following:

4 document(s) are [available](#) ?

Available Documents						
				Show	10	records
1-4 of 4 Available Documents						
Date	Document Title	Transaction ID	Document Type	Court	Case Number	Case Name
7/24/2012 10:00 AM CDT	Plaintiff Jane Doe Motion for Extension of Time to File Response to Defendant GHI Motion for Dismissal	45506119	Motion	Mock Court-Filing & Serving	2011NA00001-888	Doe, Jane vs G H I Corp
7/6/2012 2:53 PM CDT	Plaintiff John Doe's Amended Complaint adding Defendants Joe's Towing and Bob's Auto Service	45196608	Amended Answer	Mock Court-Filing & Serving	Multi-Case	Multi-Case
6/29/2012 10:55 AM CDT	Proposed Order Granting Motion for Summary Judgment	45087318	Proposed Order	Mock Court-Filing & Serving	Multi-Case	Multi-Case
6/27/2012 2:51 PM CDT	Plaintiff Jane Doe's Motion for Summary Judgment	45047953	Motion for Summary Judgment	Mock Court-Filing & Serving	Multi-Case	Multi-Case
1-4 of 4 Available Documents						

[Create Job](#) [Close](#)

Batch Document Processor Tips

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

- You will then receive a message that states that your documents have been saved and that provides you with a Batch Job number.

The available documents you have selected have been saved as a Batch Job: **20120814174719**. To access and download or print this job, you must install [Batch Document Processor 3.0](#) (Administrator rights are required). Batch Jobs are saved in our system for 30 days.

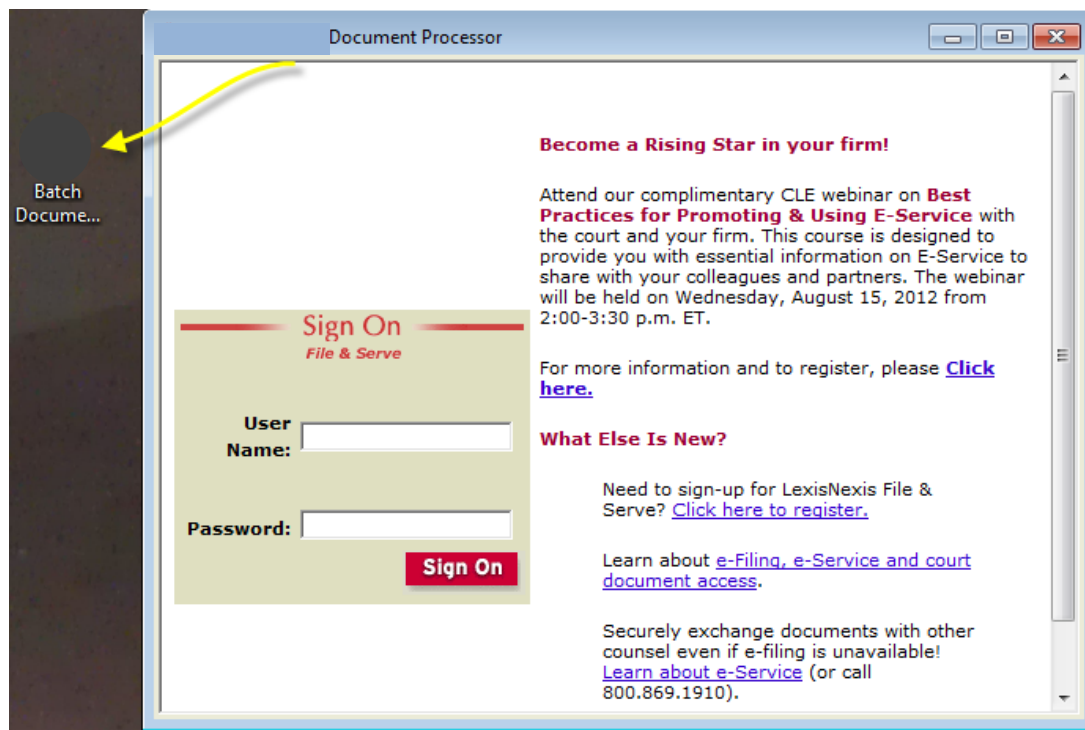
For additional assistance, please contact LexisNexis Customer Support at 1-888-529-7587. Our team is available 24 hours a day, 7 days a week to assist you.

Saved Batch Jobs		
		Show 50 records
Job Number	Document Count	Date Created
20120814174719	4	8/14/2012 5:47 PM EDT

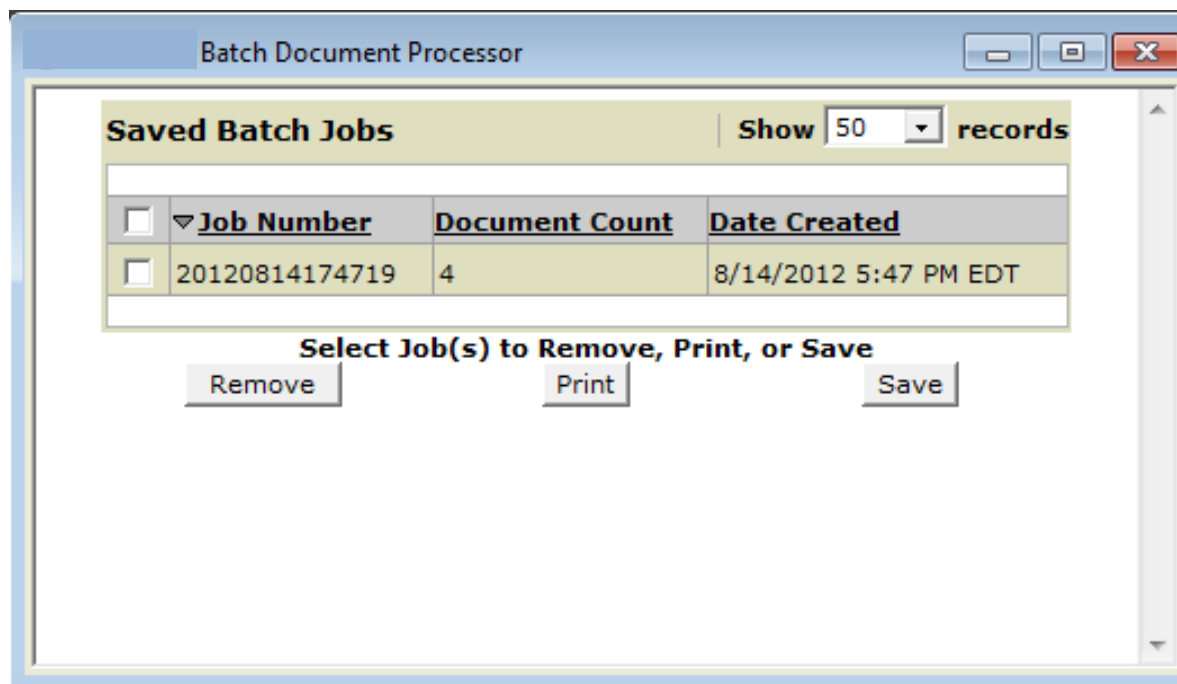
[Close](#)

The batch file is now created. The file is listed as a Job Number. (listed as year, month and date and time).

- You can now proceed with downloading or printing of your batch documents by double-clicking on the Batch Document Processor Icon on your desktop.



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



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.

7. 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.

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.

Batch Document Processor

Available Documents (Documents displayed below have been resorted)

1-4 of 4 Available Documents

Save Status	<input checked="" type="checkbox"/>	Size	Document Title	Court	Case Number	Case Name
	<input checked="" type="checkbox"/>	6.87KB	Plaintiff John Doe's Amended Complaint adding Defendants Joe's Towing and Bob's Auto Service	Mock Court-Filing & Serving	Multi-Case	Multi-Case
	<input checked="" type="checkbox"/>	6.88KB	Proposed Order Granting Motion for Summary Judgment	Mock Court-Filing & Serving	Multi-Case	Multi-Case
	<input checked="" type="checkbox"/>	10.13KB	Plaintiff Jane Doe's Motion for Summary Judgment	Mock Court-Filing & Serving	Multi-Case	Multi-Case
	<input checked="" type="checkbox"/>	103.92KB	Plaintiff Jane Doe Motion for Extension of Time to File Response to Defendant GHI Motion for Dismissal	Mock Court-Filing & Serving	2011NA00001-888	Doe, Jane vs G H I Corp

1-4 of 4 Available Documents

Save documents to: **4 documents requiring 127.80KB of drive space.**
C:\Users\karnssd\AppData\Roaming\LexisNexis\BatchDocuments\

[Browse](#) [Save](#) [Back](#)

Saved 0/4

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.

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

- ✓ 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.

Batch Document Processor

Available Documents

Print Status	<input checked="" type="checkbox"/>	Copies	Date	Document Title	Pages	Transaction ID	Document Type	Court	Case Number	Case Name
	<input checked="" type="checkbox"/>	1	11/17/2004 12:57 PM EST	Hercules Incorporated v. OneBeacon America Inc. Co. et al. So ordered from Del Pesco, J. from joint stipulation of Pltf. hercules Inc. and Certain Deft's. to dismiss certain deft's.	9	4624587	Order	DE Superior Court- New Castle County	02C-11-237 SCD	Hercules Inc vs OneBeacon America Insurance Co et al

☒ Add Cover Sheet

1 document selected for printing.

Print to Default Printer: Dell Photo AIO Printer 962

Documents printed 0/1