LexisNexis® File & Serve

My Organization Profile-
Organization Administrator

User Guide

LexisNexis File & Serve

My Organization Profile- Organization Administrator

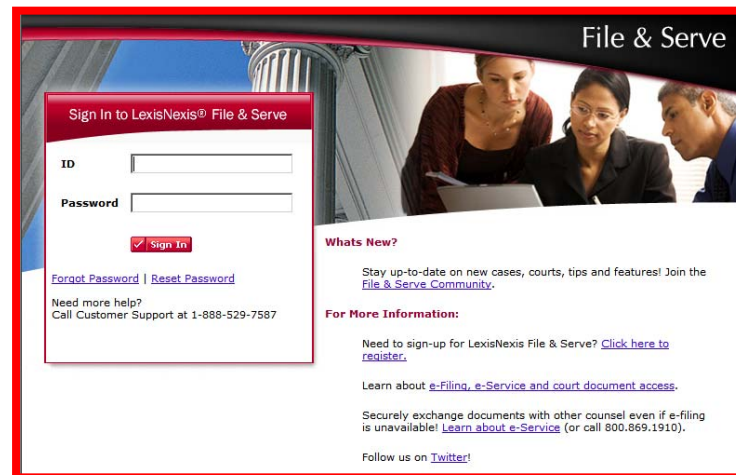### Table of Contents

File & Serve Resources

LexisNexis 24/7 Customer Support
1-888-529-7587

File & Serve Community Site (www.fileandserve.com):

File & Serve Login Page (www.fileandserve.lexisnexis.com):

Organization Administrator Overview

What is an Organization Administrator?

An Organization Administrator ("OA") is an individual or group of individuals who have been granted special File & Serve permissions. The OA can make any necessary changes to user information and maintain other information pertaining to the organization's File & Serve account.

Every organization registered with LexisNexis File & Serve must have at least one user selected as an OA.

Where are the permissions accessed?

To access the OA permissions, click on the File & Serve Preferences link in the upper right corner of the File & Serve Homepage after logging into the application. Then, choose links using the Options box on the left side of the page.

Where permissions are given to the OA?

An OA is given the authority to Add Users, Manage Users, Set Permissions, Modify Client Matter, and Update/Change Organization Information.

What is a National Organization Administrator?

A National Organization Administrator ("NOA") is an individual or a group of individuals who have the ability to manage users and firm profiles across *multiple offices* without maintaining separate File and Serve user names for each office. A firm can designate more than one user as a NOA.

Add User Link

Add User

Add a new user to Mock Appeals Firm A-Demo by completing the fields below.

User Type: Attorney

First Name:

Middle Name (Optional):

Last Name:

Suffix (Optional): -Select-

Phone Number: ex: 123-123-1234

Fax Number: ex: 123-123-1234

email:

Bar Information
Enter bar information below

Bar Number	State	Remove
	-Select-	☒
	-Select-	☒
	-Select-	☒

Add additional bar number

Save

1. The **Add User** link allows OA's to create additional User ID's in their firm.
   a. Complete the open type fields and drop down menus.
   b. Click the "Save" button at the bottom of the page to submit the request.
   c. A welcome email will be sent to the new User within 48 hours with a login ID and temporary password.
2. Additional Bar Numbers/States can be added for "Attorney" Users. "Staff Member" users will not be required to add a Bar Number

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Add User Link Tips:

✓ **New User Email:** If the New User does not receive a welcome email within 48 hours, please call File & Serve Customer Service for assistance.

✓ **Bar Number Information:** If your State does not use Bar Numbers, simply type "NA" into the Bar Number open type field.

Manage Users Link

1. The **Manage Users** link allows OA's to edit, remove, or transfer any of the organization's current users.
2. Use the "Edit" drop down menu to update:
   a. User Information- phone, fax, email, etc.
   b. Notification Options- select recipients to receive service.
   c. Saved Transaction Access- allow others in the firm to share access to Saved Transactions.
   d. Reset & email Password- generate a new temporary password email for Users.
3. Click on the "Remove Or Transfer" x-box next to a User to:
   a. Delete a User from a firm.
   b. Transfer a User to another firm. When transferring a User, the system will prompt for the name of the organization to transfer the User to.

Set Permissions Link

Set Permissions

Grant users within Mock Appeals Firm A-Demo to have certain administrative rights. (See below for details)

Name	ID	email	Organization Administrator	Reset Password	Modify Organization	Remove User	Add/Modify User
Adams, Lisa	lisa adams	laurie.machado@lexisnexis.com	☐	☐	☐	☐	☐
Adams, Lori	lori adams	laurie.machado@lexisnexis.com	☑	☑	☑	☑	☑
Adler, Lena	Lena Adler	elise.herding@lexisnexis.com	☐	☐	☐	☐	☐
Attorney, Amy	Amy Attorney	amy.attorney@lexisnexis.com	☐	☐	☐	☐	☐
Payne, Justin	Justin Payne	roberto.rodriguez@lexisnexis.com	☑	☑	☑	☑	☑

Save

Organization Administrator:	Checking this box will make the user a Organization Administrator. This will grant them the right to access this page.
Reset Password:	Grants the selected user rights to reset passwords.
Modify Organization:	Grants the selected user rights to modify the Organization's information.
Remove User:	Grants the selected user rights to remove a user from the Organization.
Add/Modify User:	Grants the selected user rights to add users or edit existing users of the Organization.

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1. The **Set Permissions** link allows OA's to share Organization Administrator rights with other firm members.
2. Use the series of checkboxes to select/deselect the desired rights and click the "Save" button at the bottom of the page to grant user rights.

Modify Client Matter Link

Modify Client Matter Information

Modify Client Matter information for Mock Appeals Firm A-Demo.

Search for client matter information by completing at least one field below.

First Name:	[ ]
Middle Name:	[ ]
Organization/Last Name:	[ ]
Suffix:	-Select- ▾
Case Name:	[ ]
Case Number:	[ ]

Find

Results: 1 - 10 of 397   Results per page: 10 ▾

Pages: < Prev   1 2 3 4 5 6 7 8 9 10 ... Next >

Client Name ▲	Court	Case Name	Case Number	Client Number	Matter Number	Edit
1st Bank	CO Mock Court of Appeals (Court Demo Only)	1st Bank vs Davis Jones				edit
Adams, Leslie	CO Mock County District Court	Leslie Adams vs Summit Cleaning	2010CV5614			edit
Adams, Leslie	CO Mock County District Court	Leslie Adams vs Michael Moore	2011CV1126			edit
Allen, Jessica	CO Mock County District Court	Jessica Allen vs Good Samaritan Hospital	2011CV5612			edit

1. The **Modify Client Matter** link allows OA's to add or edit client/matter numbers so that they will automatically appear on the firm's monthly invoice when a transaction takes place involving that specific case/matter.

    a. Search for client matter information by entering information in the blank fields and drop-down menu and click "Find".
    b. Scroll through the list of information provided to manually locate client.
    c. Click "Edit".

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Modify Client Matter Link Tips:

✓ **Note:** The OA can also mandate the entering of firm codes to all billable sections of the system, so that those codes appear next to all entries on the invoice. See the "My Organization" link section below for details.

Edit Client Matter Number

Modify your client information here

1. Enter or edit the matter number for this case

Court Name: CO Mock County District Court
Case Name: Jessica Allen vs Good Samaritan Hospital
Case Number: 2011CV5612
Matter Number: [   ]

2. Enter or edit the client number for this client

Client Name: CO Mock County District Court
Client Number: [   ]

3. Is this client number applicable for all cases in which your organization represents this client?
- ○ Yes, please use this client number for this client in all cases.
- ◉ No, only apply this client number for this client in this case.

Save   Cancel

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d. Enter your new information in the "Matter Number" and "Client Number" fields.
e. Click the radio button next to **Yes,** please use this client number for this client in all cases or **No,** only apply this client number for this client in this case.
f. Click **Save t**o save your changes and return to the Modify Client Matter Information screen.

My Organization Link

1. The **My Organization** link allows OA's to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.
2. To edit the **organization contact information:**
   a. Type the new information in the blank fields.
   b. Use the drop down menus to select Country and State.
   c. Click the "Save" button to ensure that your changes are updated in the system.

3. To edit the **primary contact information:**
   a. Use the drop down menu to select contact.

b. Click the "Save" button to ensure that your changes are updated in the system.

Invoice Options

Mock Appeals Firm A-Demo's preferred method of receiving invoices from File & Serve:

○ **Electronic Invoices only**
   Sends Electronic Invoice via email.
   Email: [   ]

◉ **Paper Invoices**
   (Mailed to the physical address above via US mail. Additional fees will apply.
   See posted price sheets for details.)

4. To choose **invoice options:**
   a. Click either the "Electronic" or "Paper" invoices radio button.
   b. Type email in blank field for electronic invoices.
   c. Paper invoices will be sent to the address on file.
   d. Click the "Save" button to ensure that your changes are updated in the system.

Billing Contact

The person in Mock Appeals Firm A-Demo who serves as the contact for billing information. **Note:** *The Primary contact is the default Billing contact.*

You can change the Billing Contact below.

   Billing Contact Name: [Lori Adams ▼]

5. To edit the **billing contact information:**
   a. Use the drop down menu to select contact.
   b. Click the "Save" button to ensure that your changes are updated in the system.

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Mandatory Billing Reference

You may require File & Serve users in your organization to enter a billing reference for each charge incurred.

Select when users within Mock Appeals Firm A-Demo are required to enter a billing reference:

Select All | De-Select All

- ☐ Submit Filing & Service transaction
- ☐ Create an alert
- ☐ Search
  - ☐ Search a document/transaction
  - ☐ Search a case history
  - ☐ Search for cases
  - ☐ Search a daily docket
  - ☐ Search a transaction status
- ☐ Purchase a document
- ☐ Calendar Events Search
- ☐ Transaction Report
- ☐ View Read Status
- ☐ Message Board
- ☐ Document Upload

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6. To select **charges to be mandated for billing references:**
   a. Use the series of checkboxes to select/deselect the charges for mandatory billing information.
   b. Use the "Select All" and "De-Select All" links to choose all or un-choose all boxes at once.
   c. Click the "Save" button to ensure that your changes are updated in the system.

Notes

You may allow File & Serve users in your organization to enter notes for:

- ☑ Custom Document List Notes
- ☑ Case Notes (available in Case History)
- ☑ Document Notes (available in Case History)

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7. To enable or disable **notes for custom document list, case notes, or document notes:**
   a. Use the series of checkboxes to select/deselect the notes to be enabled/disabled.
   b. Click the "Save" button to ensure that your changes are updated in the system.