File & Serve*Xpress*

My Organization Profile- Organization Administrator

User Guide

File & Serve*Xpress*™

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My Organization Profile- Organization Administrator

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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.

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 File & ServeXpress 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.

What 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.

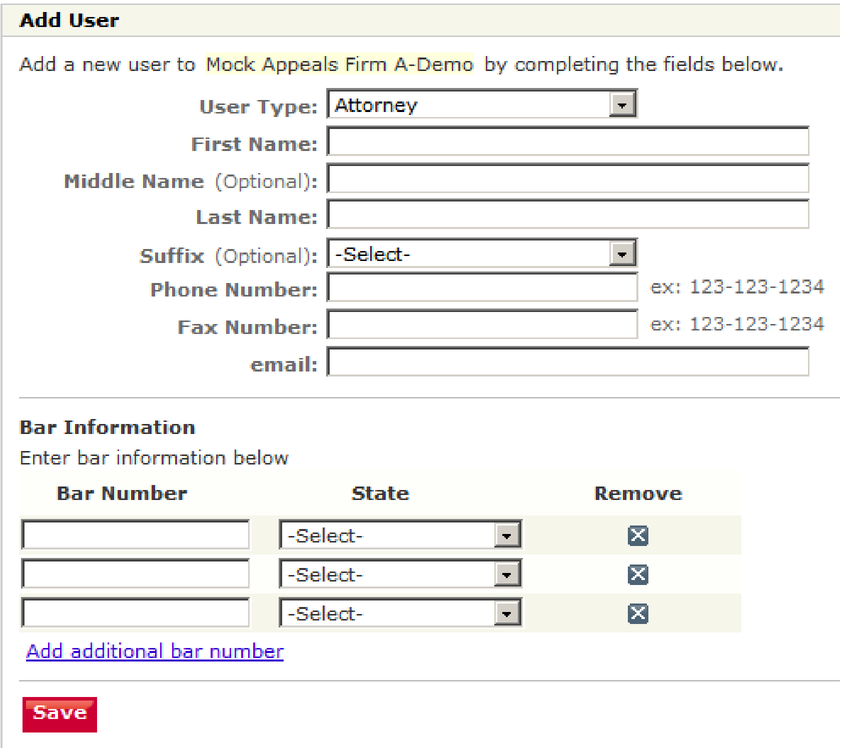
What is a National Organization Administrator?

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.

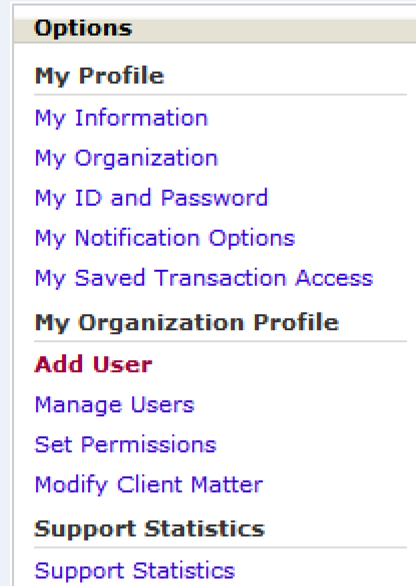
Tips for Organization Administrators:

- ✓ **24/7 Access:** You can make changes to your organization's account any time you have access to File & Serve. Call our 24/7 Client Service line whenever you need our help.
- ✓ **National Organization Administrator Set up:** Call File & Serve Client Service at 888-529-7587 to designate an NOA for your firm. Be prepared with your firm name and office locations that should be related, the "main" office location, and the User ID of the newly appointed NOA.

Add User Link



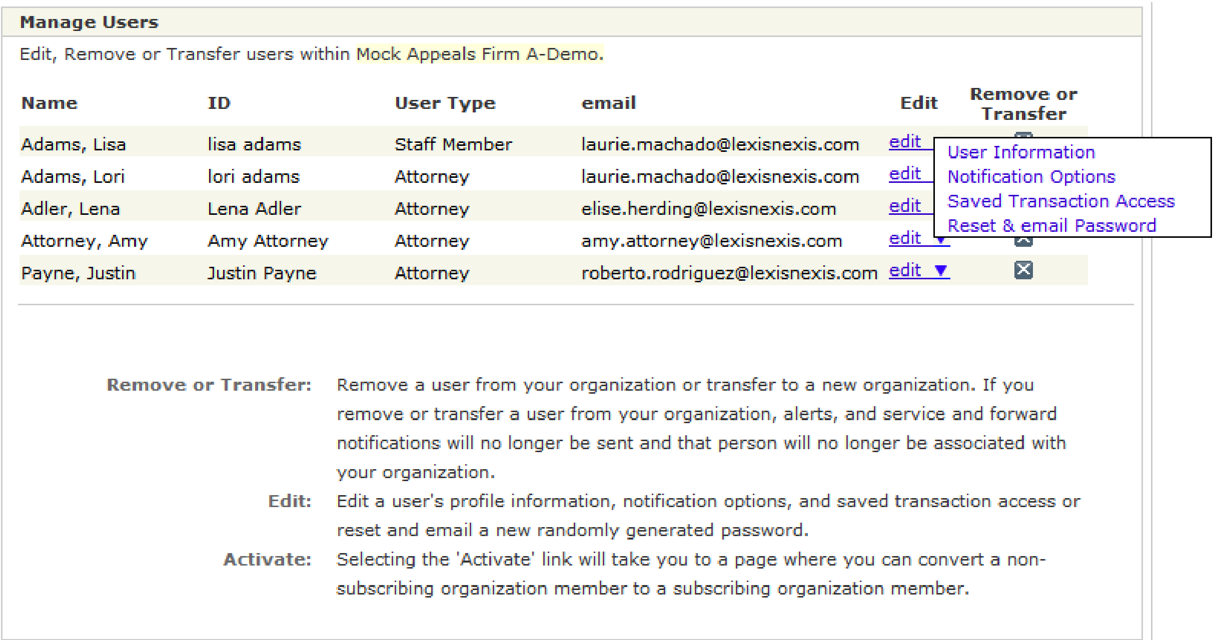
1. The **Add User** link allows OA's to create additional User ID's in their firm.
    a. Complete the open type fields and drop down menus.
    b. Click the "Save" button at the bottom of the page to submit the request.
    c. A welcome email will be sent to the new User within 48 hours with a login 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.



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


Manage Users

Edit, Remove or Transfer users within Mock Appeals Firm A-Demo.

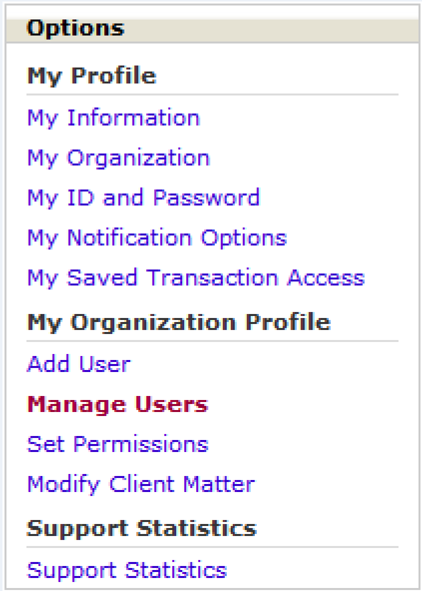
Name	ID	User Type	email	Edit	Remove or Transfer
Adams, Lisa	lisa adams	Staff Member	laurie.machado@lexisnexis.com	edit	
Adams, Lori	lori adams	Attorney	laurie.machado@lexisnexis.com	edit	
Adler, Lena	Lena Adler	Attorney	elise.herding@lexisnexis.com	edit	
Attorney, Amy	Amy Attorney	Attorney	amy.attorney@lexisnexis.com	edit ▼	
Payne, Justin	Justin Payne	Attorney	roberto.rodriguez@lexisnexis.com	edit ▼	

User Information
Notification Options
Saved Transaction Access
Reset & email Password

Remove or Transfer: Remove a user from your organization or transfer to a new organization. If you remove or transfer a user from your organization, alerts, and service and forward notifications will no longer be sent and that person will no longer be associated with your organization.

Edit: Edit a user's profile information, notification options, and saved transaction access or reset and email a new randomly generated password.

Activate: Selecting the 'Activate' link will take you to a page where you can convert a non-subscribing organization member to a subscribing organization member.



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.

Options

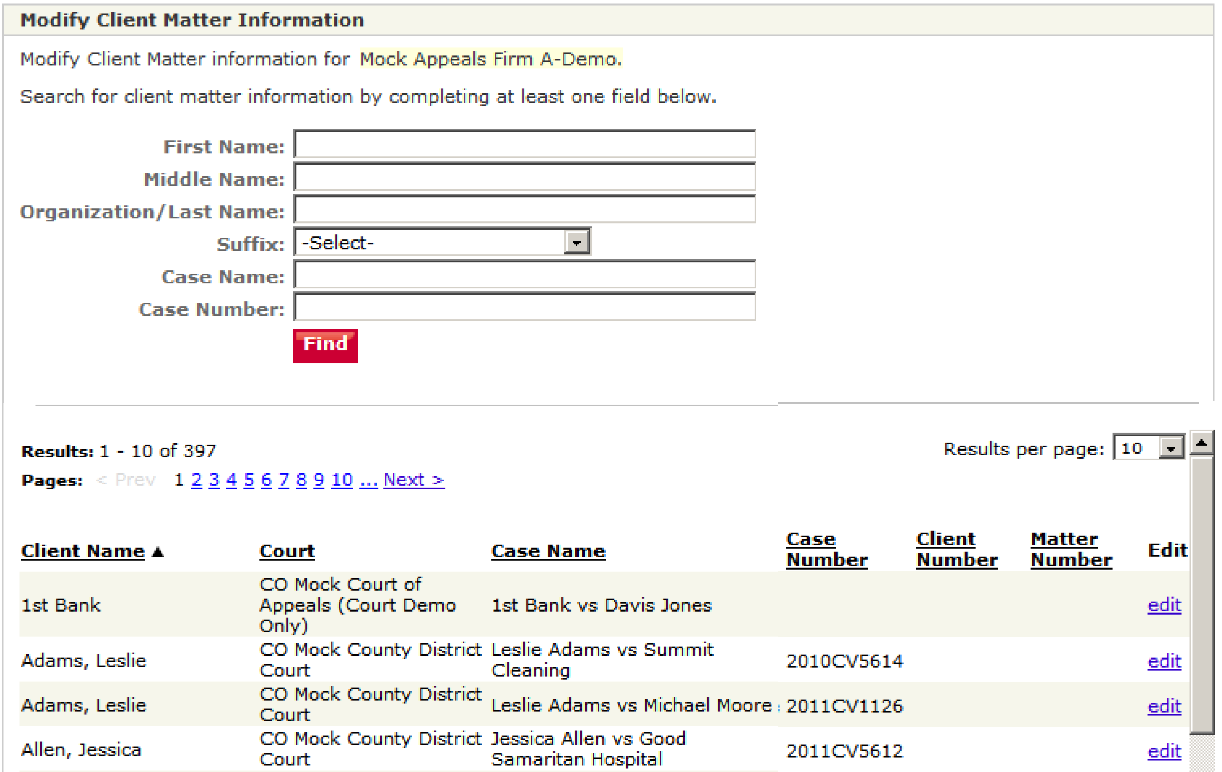
My Profile
- My Information
- My Organization
- My ID and Password
- My Notification Options
- My Saved Transaction Access

My Organization Profile
- Add User
- Manage Users
- Set Permissions
- Modify Client Matter

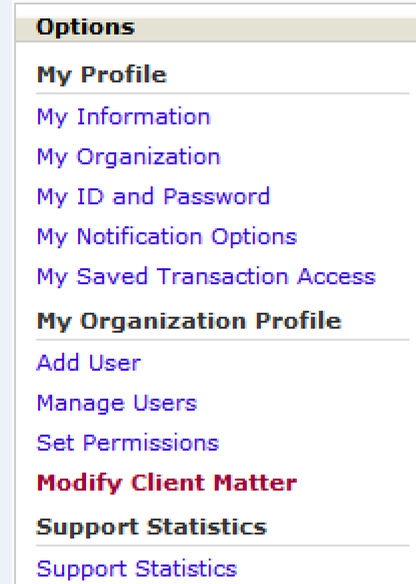
Support Statistics
- Support Statistics

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

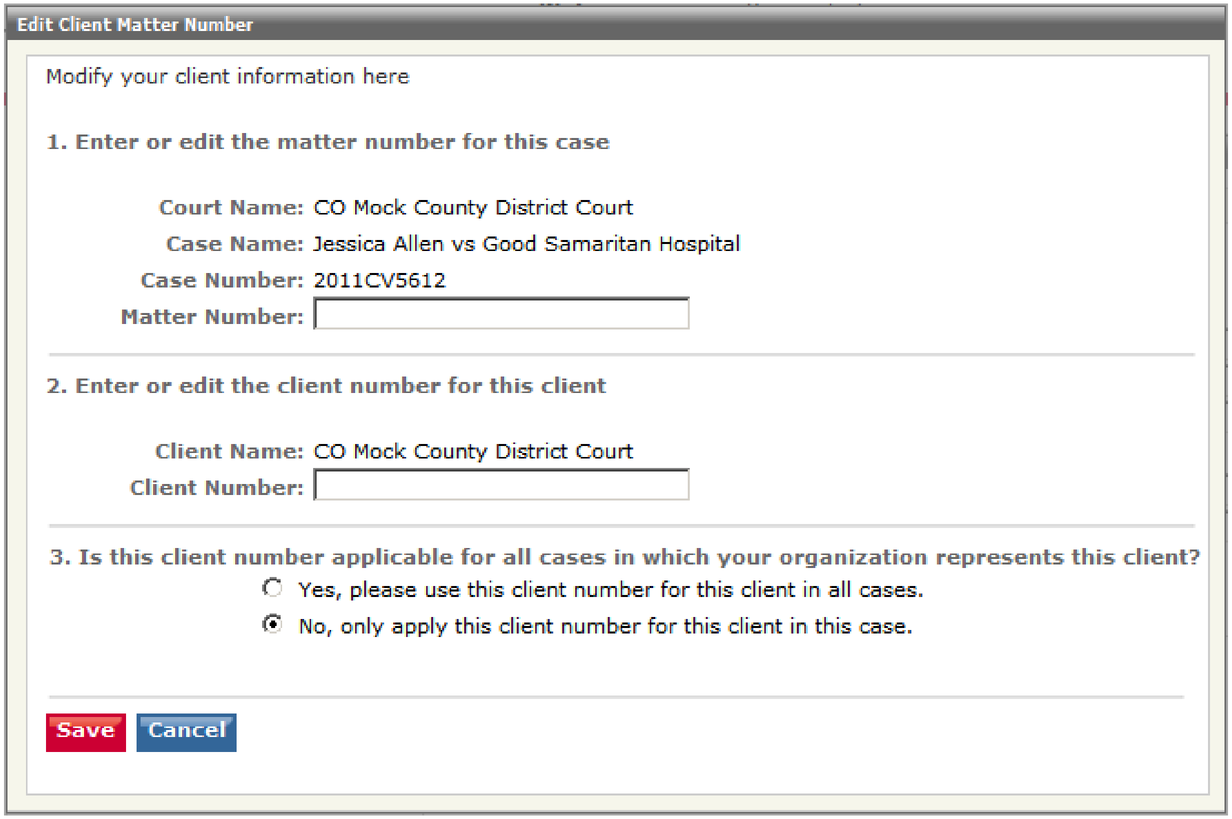


1. The **Modify Client Matter** link allows OA's to add or edit client/matter numbers so that they will automatically appear on the firm's monthly invoice when a transaction takes place involving that specific case/matter.
    a. Search for client matter information by entering information in the blank fields and drop-down menu and click "Find".
    b. Scroll through the list of information provided to manually locate client.
    c. Click "Edit".



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

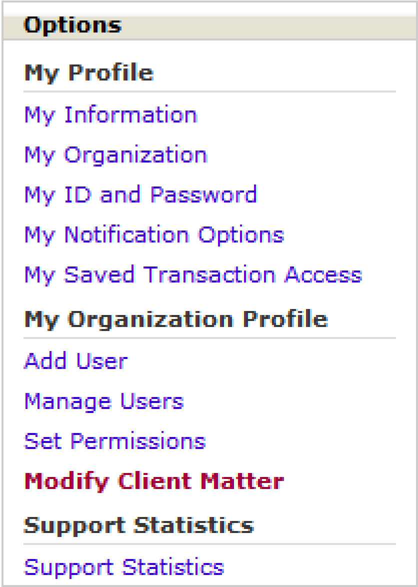
Court Name: CO Mock County District Court
Case Name: Jessica Allen vs Good Samaritan Hospital
Case Number: 2011CV5612
Matter Number:

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


Options

My Profile
My Information
My Organization
My ID and Password
My Notification Options
My Saved Transaction Access

My Organization Profile
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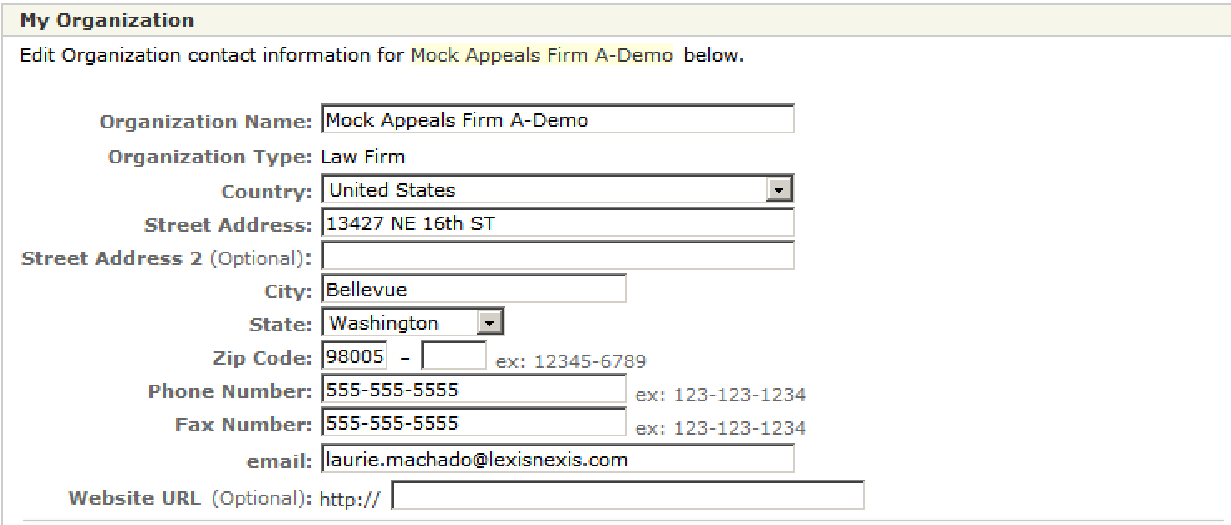
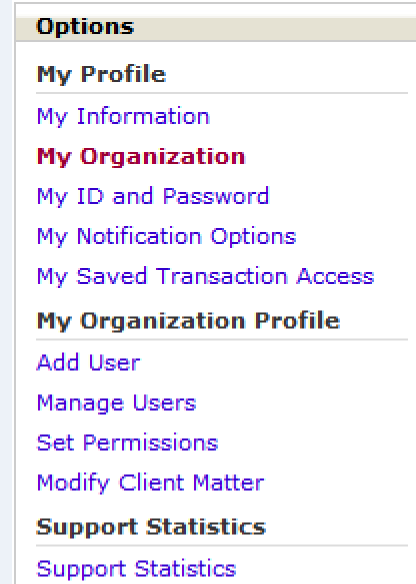
Modify Client Matter

Support Statistics
Support Statistics

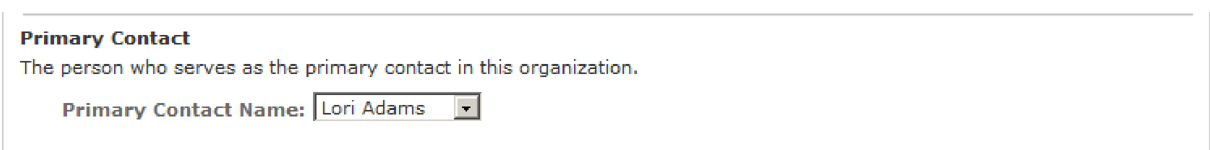
d. Enter your new information in the “Matter Number” and “Client Number” fields.
e. Click the radio button next to **Yes,** please use this client number for this client in all cases or **No,** only apply this client number for this client in this case.
f. Click **Save to** save your changes and return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

My Organization Link



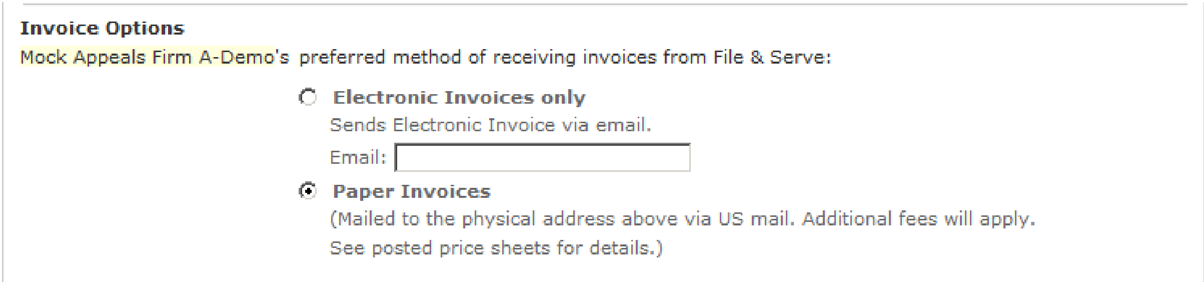


1. The **My Organization** link allows OA's to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.
2. To edit the **organization contact information:**
    a. Type the new information in 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.

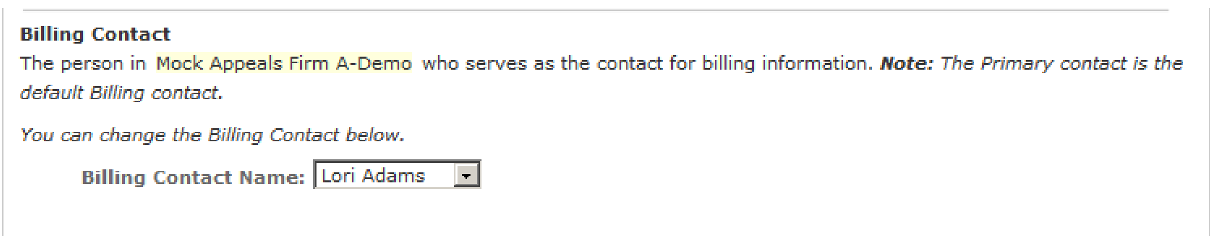


3. To edit the **primary contact information:**
    a. Use the drop down menu to select contact.

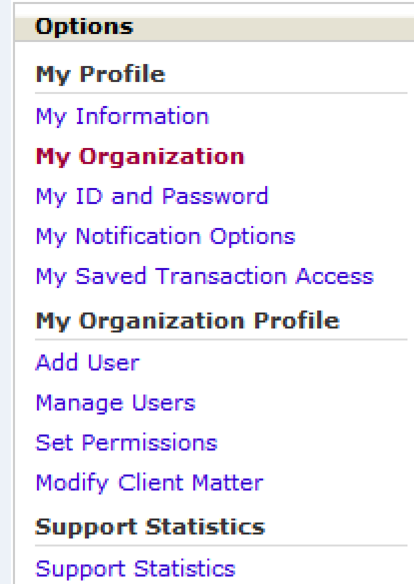
b. Click the “Save” button to ensure that your changes are updated in the system.

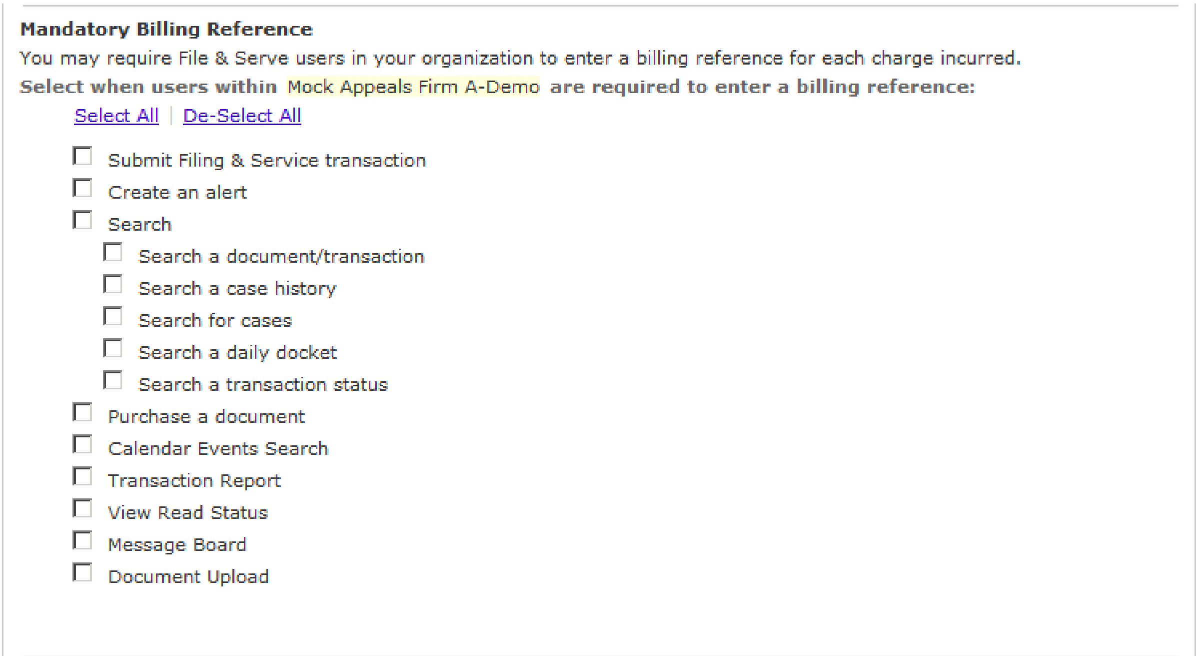


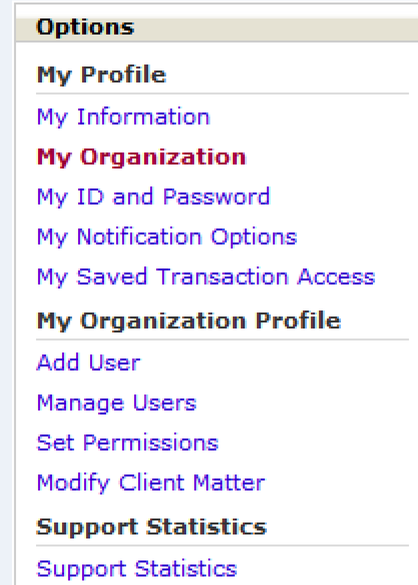
4. To choose **invoice options:**
    a. Click either the “Electronic” or “Paper” invoices radio button.
    b. Type email in blank field for electronic invoices.
    c. Paper invoices will be sent to the address on file.
    d. Click the “Save” button to ensure that your changes are updated in the system.



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.

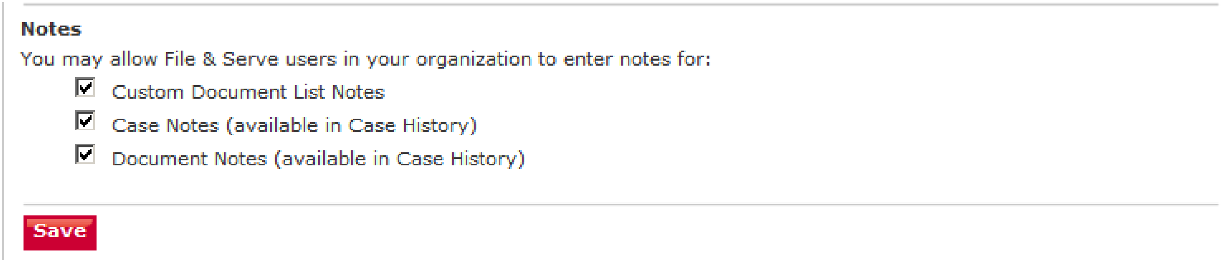






6. To select **charges to be mandated for billing references:**
   a. Use the series of checkboxes to select/deselect the charges for mandatory billing information.
   b. Use the “Select All” and “De-Select All” links to choose all or un-choose all boxes at once.
   c. Click the “Save” button to ensure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

My Organization link continued on next page…



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.