

# File & ServeXpress Best Practices

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## FILING AND SERVICE

### How do I file a text document?

To file a text document:

1. Create the document outside File & ServeXpress in a program such as Microsoft Word or Corel WordPerfect and save it to your hard drive.
2. Logon to File & ServeXpress and click the **Filing & Service** tab. Select a **file/serve** option, and follow the instructions on each tabbed page.
3. Select the document from your hard drive when prompted.

### How do I file a scanned document?

The resolution of a scanned image impacts the size of a file, and the size of the file impacts the speed at which the document will be transferred over the Internet. When scanning images please use a resolution of 200 dpi (dots per inch) or lower. Higher resolution is not discernible on your screen and significantly increases the size of the document. Also, instead of inserting a large graphic file into a word processing document, include the actual graphic file as a separate document included in the same envelope.

A graphic file will download much faster over the Internet than when it is embedded into a word processing document. Include a cover page to identify the nature of the graphic file. For more information on how to scan large document please consult the File & ServeXpress Scanning Best Practices document located in our Quick Guide section of the Resource Center. To file a scanned document:

1. Scan the document outside File & ServeXpress and save it to your hard drive as a .tif file or .pdf file. If you are saving documents as a .pdf file, make sure to scan them all no longer than 8 1/2 X 11, or they will be clipped during the File & ServeXpress conversion process.
2. Sign on to File & ServeXpress and click the **Filing & Service** tab. Select a **file/serve** option, and follow the instructions on each tabbed page.
3. Select the document from your hard drive when prompted.

### How can I find a list of filings?

Within File & ServeXpress, click on the **Search** tab. In the following screen you can search for transactions based on any combination of the search criteria listed. Type in your search criteria then click the **Search or Retrieve** button to view the results of your search.

### Why am I prompted to purchase a document when I click on the document title?

Any filing that was neither filed by, nor legally served on, someone at your firm must be purchased.

### When I try to view a document I've selected to file or a document on the Filing and Service Details page, the document doesn't open. Why?

When you try to view a document, if the "Open In" dialog box appears, select AcroRd32. The document should open in Acrobat Reader. If you receive an error message after selecting AcroRd32, then please contact File & ServeXpress Client Support at 888-529-7587.

## SERVICE NOTIFICATION

### Is there a way File & Serve can notify me via e-mail when I am served with a filing?

Yes. While you are logged on to File & Serve, do the following:

1. Click on the *Preferences* link in the upper right hand corner of the screen.
2. Click the **User Profile** button
3. Select the **Notifications** tab at the top of the screen.
4. Choose the option you wish under **Email Notification of Inbox Item**.
5. Click the **Save Email Options** button.

### How do I know I have received service?

When you are served, you receive official notification of that service online. You can designate additional recipients who also receive notification when you are served. For instance, if you want a paralegal or secretary to receive notification, you can specify that individual on the **Notification** tab of **User Profile**. In addition to official service, you can also choose to receive courtesy notification by e-mail, receive a copy of filing documents attached to the e-mail message or receive a daily digest email.

### How can I verify if I was included as a recipient of a document filed with the court?

All filings filed with the court in a particular case can be viewed by subscribing firms that are parties to the case. You can view all of the filing information, including the service list, by selecting **Transaction Number** for a specific filing.

## ADDING OR REMOVING ATTORNEYS/PARTIES

### How do we withdraw an attorney or dismiss a party from an active case?

Complete the information under the **Modify Attorney** tab of **Case & Party Management** and attach a copy of the Dismissal Order or NonSuit.

### How do I add or remove parties or attorneys in a case?

You can add or remove parties within File & Serve in those jurisdictions where the features have been enabled. To request such changes please do the following:

1. Click on the **Case & Party Management** tab.
2. Click on the appropriate button for the changes you are requesting.
3. Input the changes as shown on the page then click the **Submit** button.

## SYSTEM SUPPORT

### I don't remember my password. Can you reset it for me?

Click the "Send Password" button on the Sign In page. Your password will automatically be reset and the new password will be sent you via email. If you have further issues, call our Client Support Center at 1-888-529-7587.

### How do I add a new user to my firm?

1. Click the *File & ServeXpress Preferences* link in the upper right hand corner of the screen.
2. Click the **Firm Profile** button.
3. Click the **Add User** tab.
4. Fill out the user's information as thoroughly as possible, and click the **Submit** button.
5. The user will receive an e-mail with their username & password within 48 hours.

### We have computer problems and need to file now. What can we do?

If you are having technical problems and have a filing due, please contact our Customer Service Center at 1-888-529-7587.

### I have an error message on my computer. What do I do?

If the error message occurs in the File & ServeXpress application please call our Client Support Center 1-888-529-7587.

### What are the recommended system requirements to run File & ServeXpress?

You do not need to download any software for File & ServeXpress but you will need to have a personal computer with current levels of operating system and desktop applications. The minimum requirements necessary to run File & ServeXpress can be found in the File & ServeXpress Minimum Requirements document located in the Quick Guide section of the Resource Center. These minimum requirements will meet your basic needs but you should consult your IT professional if your computer is unable support use of the system. You may also our Client Support Center at 1-888-529-7587 if you have any questions.

### Do I need to scan for viruses?

File & ServeXpress does automatically scan all uploaded documents for viruses. Scanning your documents for viruses *before* you send them is an additional worthwhile precaution.

### Does the size of my document/file matter?

The size of your file is determined by a number of factors including number of pages, resolution, embedded graphics, etc. The file size combined with the speed of your Internet connection will affect how fast your document will be sent. By being familiar with these time requirements, you will be better able to plan your filing. Remember that filing occurs in the background, so you can continue working on your computer while your document downloads.

#### Document Download Times

Document Type/Pages	Size in Kbytes (est)	Minutes (m)/Seconds (s)							
		33.6kbps		56kbps		256kbps		T1	
		MAX	MIN	MAX	MIN	MAX	MIN	MAX	MIN
MS Word 1p	8	10s	2.4s	6s	1s	< 1s	< 1s	< 1s	< 1s
MS Word 10pp	100	1m 59s	30s	1m 11s	18s	10s	8s	6s	< 1s
MS Word 100pp	1,120	22m 13s	5m 33s	13m 20s	3m 20s	1m 52s	1m 28s	55s	7s
Graphic 1p	11	13s	3s	8s	2s	1s	< 1s	< 1s	< 1s
Graphic 10pp	242	4m 48s	1m 12s	2m 53s	43s	24s	19s	12s	2s
Graphic 100pp	1,210	24m	6m	14m 24s	3m 36s	2m 1s	1m 35s	1m	8s