File & ServeXpress™

Tracked Items -
User Guide

File & Serve*Xpress*

Tracked Items

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File & ServeXpress 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 & ServeXpress Resource Center** is available within File & ServeXpress by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!

- **File & ServeXpress Login Page** **https://secure.fileandservexpress.com/Login/Login.aspx** is where you can find password help, what's new and any important information like scheduled maintenance or system changes.

- **File & ServeXpress Notices** is an information page that is available on the top, right-hand side of the File & ServeXpress Home tab, once you sign into File & ServeXpress. 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 & ServeXpress home page in the **Track & Manage** tools box.
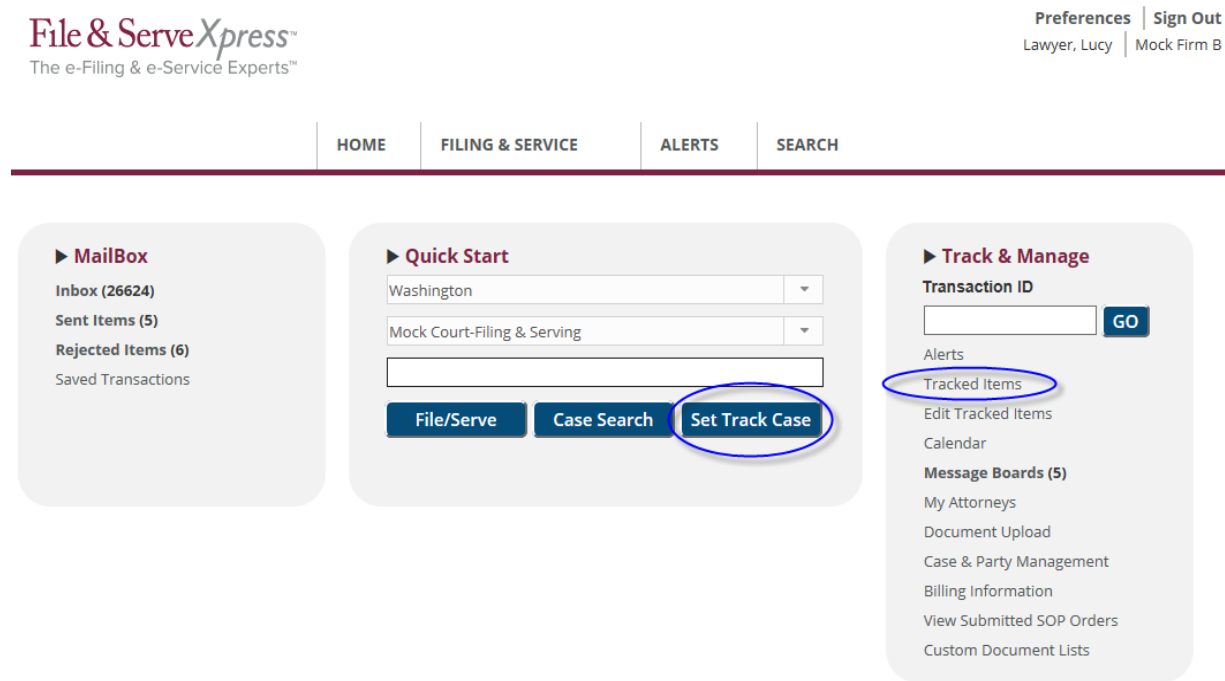
Click on the **Tracked Items** hyperlink to view your cases. From this page you can **File & ServeXpress** into your selected cases, view the case history and party information, and check for newly received, recently filed and rejected documents. You may also view any new Alerts you have set for that particular case.

Tracked Items Tips:

- ✓ **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 & ServeXpress.

Tracked Items

Tracked Items Tips:

✓ **"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.

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

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 that 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.

Tracked Items Setup

There are two ways to begin tracking cases: in the File & ServeXpress Quick Start box on home page and on the Tracked Items Setup page.

File & ServeXpress Quick Start

On the File & ServeXpress home page, the Quick Start box is located in the center of the page. To create a new Tracked Case:

1. Choose the appropriate State or Jurisdiction from the first dropdown list in the Quick Start box.
2. Choose the Court or e-Service project from the second dropdown list in the Quick Start box.
3. Enter the Case Number.
4. Click the button for Set Tracked Case.

File & ServeXpress Tracked Items link

You can also access the Tracked Items set up page by clicking on the Tracking Setup hyperlink on the Tracked Cases & Groups page.

To set your case to track, scroll down to the second area of the Tracked Cases & Groups Setup Page. The Find Items tab is displayed by default.

1. To retrieve a list of cases in which you are directly involved, select a jurisdiction and 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.

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

2. 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.

Tracked Items Tips:

✓ 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.

Add Tracked Item(s)

☑ Court	△ Case name	Case number
☑ Mock Court-Filing & Serving	CLOSED Smith, Jane vs Rawl Sales Corp	05-C-997 MNG
☑ Mock Court-Filing & Serving	Doe, James et al vs John Smith et al	2012 NA 00001-8888
☑ Mock Court-Filing & Serving	Doe, Jane vs G H I Corp	2011NA00001-888
☑ Mock Court-Filing & Serving	Doe, John vs A B C Corp	2012CV999991-888
☑ Mock Court-Filing & Serving	Doe, John vs Rawl Sales Corp	05-C-999 MNG
☑ Mock Court-Filing & Serving	John, Smith vs Acme Corp et al	2013L 999991
☑ Mock Court-Filing & Serving	Johnson, Janet vs Rawl Sales Corp	06-C-998 MNG
☑ Mock Court-Filing & Serving	O'Brian, Brian vs Acme Asbestos Inc et al	12-999992-NP
☑ Mock Court-Filing & Serving	Robertson, Robert vs Acme Asbestos Inc et al	12-999990-NP
☑ Mock Court-Filing & Serving	Smith, James vs A B C Auto Inc	15CV12345
☑ Mock Court-Filing & Serving	Stevenson, Steven vs Acme Asbestos Inc et al	12-999991-NP

1-11 of 11 case(s)

1-11 of 11 case(s)

Add Tracked Item(s)

Tracked Items Tips:

✓ 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.

✓ 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.

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

4. 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 Items** 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.

5. Once you have created a list of cases to track on your home page, they will remain there until you remove them.

Managing Tracked Items

From the **Selected Items** tab of the **Tracking Setup** page, you can remove **Tracked Items** you are no longer interested in Tracking.

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.