

File & Serve *Xpress*™

Calendar - User Guide



File & ServeXpress

Calendar

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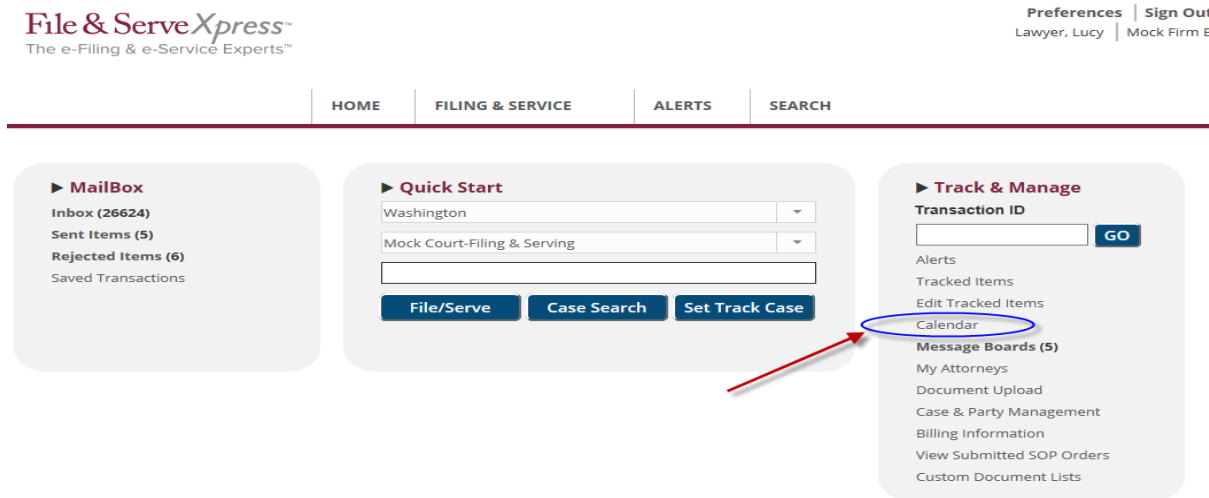
File & ServeXpress Resources

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 & 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.

Calendar Overview

Use the **Calendar** function to create a calendar event or view a list of calendared events in cases on File & ServeXpress. The **Calendar** can be found in the **Track & Manage** section of the File & ServeXpress homepage:



Calendar Tips:

- ✓ **Note:** Not all jurisdictions use the Calendar feature in File & ServeXpress.
- ✓ **Note:** The following Calendar options will be outlined in this guide:
 1. Search for Events
 2. Add an Event

Once the **Calendar** hyperlink is clicked, the user will be given the following choices:

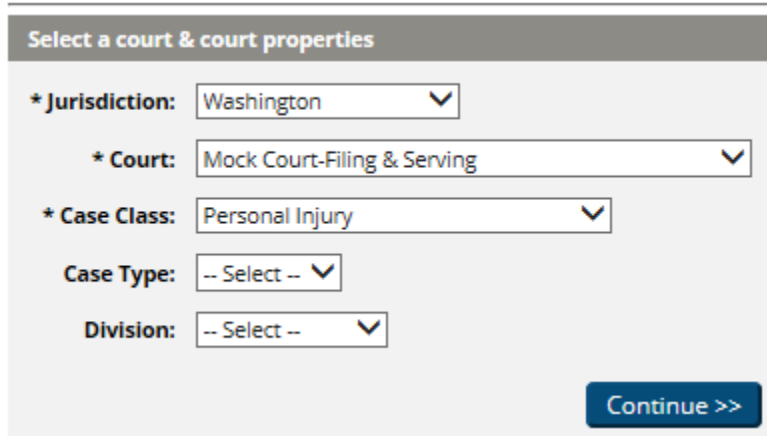
Calendar Events

- Search for events in a specific court and case class.
- Add an event in a specific court and case class.
- Resume event creation.

Go

Searching for Calendar Events

1. Click the Calendar under **Track & Manage** to display the Calendar screen.
2. Click the radio button next to “Search for events in a specific court and case class.”
3. Click the **Go** button to display the **Select a court & court properties** screen.



The screenshot shows a web form titled "Select a court & court properties". It contains five dropdown menus and a "Continue >>" button. The first three dropdowns are marked with an asterisk, indicating they are mandatory. The selected values are: Jurisdiction: Washington, Court: Mock Court-Filing & Serving, and Case Class: Personal Injury. The Case Type and Division dropdowns are currently set to "-- Select --".

Field	Value
* Jurisdiction:	Washington
* Court:	Mock Court-Filing & Serving
* Case Class:	Personal Injury
Case Type:	-- Select --
Division:	-- Select --

4. Select a jurisdiction from the Jurisdiction drop-down menu.
5. Select a court from the Court drop-down menu.
6. Select a case class from the Case Class drop-down menu.
7. Click the **Continue** button to view the **Input Criteria** screen.

Calendar Tips:

- ✓ **Note:** Only the drop-down menus with asterisks are mandatory selections. However, users may use the “Case Type” and “Division” drop-down menus to narrow their search.

Search for Calendar Events.

Input criteria.

Jurisdiction: Washington
Court: Mock Court-Filing & Serving
Case Class: Civil
Case Type: none selected
Division: none selected

Transaction ID: When using transaction id, the rest of the fields will be ignored.

Case Name: i

Case Number: i

Case Group:

Judge: First: Middle: Last:

Event Type:

* **From:** (mm/dd/yyyy)

* **To:** (mm/dd/yyyy)

* **Filter:** My Firm's Cases All Cases

List View
 Calendar View

8. Enter your case name, case number, or type of event in the **Case Name**, **Case Number**, or **Event Type** open-type fields or drop-down menu.
9. Enter dates in the **From** and **To** fields to limit your results to a particular date range.
10. Choose the radio button next to **My Firm's Cases** or **All Cases**.
11. Choose the radio button next to **List View** or **Calendar View**.

Calendar Tips:

- ✓ **Note:** When you enter search criteria, enter only the information necessary to narrow your search results. You do not need to add items to each field.

12. Click **Go** to display the Calendar.

List View

1-2 of 2												
<u>Transaction ID</u>	<u>Case Name</u>	<u>Case Number</u>	<u>Begin Date/Time (CDT)</u>	<u>End Date/Time (CDT)</u>	<u>Location</u>	<u>Event Type</u>	<u>Event Name</u>	<u>Note</u>	<u>Event Status</u>	<u>Created By</u>	<u>Authorized By</u>	<u>Last Modified By</u>
44807736	Doe, John vs A B C Corp	2012CV999991-888	6/15/2012 9:00:00 AM	6/15/2012 10:00:00 AM	2	Hearing	Motions Hearing	miscellaneous notes can be entered	Tentative	Clerk, Review	Brown, Judge	Clerk, Review
44291558	Doe, John vs A B C Corp	2012CV999991-888	6/15/2012 9:00:00 AM	6/15/2012 10:00:00 AM	2	Hearing	Motion Hearing	ADA sign language interpreter needed	Tentative	Clerk, Review	Clerk, Review	Clerk, Review
1-2 of 2												

Calendar View

June 2012							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
-->						1	2
-->	3	4	5	6	7	8	9
-->	10	11	12	13	14	15	16
						2012CV999991-888: Hearing	
						2012CV999991-888: Hearing	
-->	17	18	19	20	21	22	23
-->	24	25	26	27	28	29	30

Adding Calendar Events

Calendar Events

- Search for events in a specific court and case class.
- Add an event in a specific court and case class.
- Resume event creation.

Go

1. Click Calendar under **Track & Manage** to display the Calendar screen.
2. Click the radio button next to “Add an event in a specific court and case class.”
3. Click the **Go** button to display the **Select a court & court properties** screen.

Add a Calendar Event

Select a court & court properties

* **Jurisdiction:** Washington ▾

* **Court:** Mock Court-Filing & Serving ▾

* **Case Class:** Civil ▾

Case Type: -- Select -- ▾

Division: -- Select -- ▾

Continue >>

4. Select a jurisdiction from the Jurisdiction drop-down menu.

Calendar Tips:

- ✓ **Note:** Only the drop-down menus with asterisks are mandatory selections. However, users may use the “Case Type” and “Division” drop-down menus to narrow their search.

5. Select a court from the Court drop-down menu.
6. Select a case class from the Case Class drop-down menu.
7. Click the **Continue** button to view the **Input Criteria** screen.
8. Enter your case name, case number, or case group name into the Case Name, Case Number, or Case Group field.

Add a Calendar Event

Search for a case.

Jurisdiction: Washington
Court: Mock Court-Filing & Serving
Case Class: Civil
Case Type: none selected
Division: none selected

Case Name: ⓘ

Case Number: ⓘ

Case Group:

Judge: First: Middle: Last:

9. Click Go to display a list of matching cases.

Please select a case and click continue to add your event.

<input type="checkbox"/>	Court	Case Name	Case Number
<input checked="" type="checkbox"/>	Mock Court-Filing & Serving	Smith, James vs A B C Auto Inc	15CV12345
<input type="checkbox"/>	Mock Court-Filing & Serving	Doe, James et al vs John Smith et al	2012 NA 00001-8888
<input type="checkbox"/>	Mock Court-Filing & Serving	Smith vs Jones	2013-abc-07-44
<input type="checkbox"/>	Mock Court-Filing & Serving	John, Smith vs Acme Corp et al	2013L 999991
<input type="checkbox"/>	Mock Court-Filing & Serving	Smith, James vs D E F Corp	987654321

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Calendar Tips:

- ✓ **Note:** When you enter search criteria, enter only the information necessary to narrow your search results. You do not need to add items to each field.

10. Select the appropriate case by selecting the check box and click **Continue**.

The screenshot shows a web form for creating an event. The fields are as follows:

- Event Type:** A dropdown menu with the selected option "am 10:45 hearing".
- Event Name:** A text input field containing "Hearing on Motion for Summary Judgment".
- Location:** An empty text input field.
- Begin Date:** A date input field with "1/29/2015" and a time input field with "10:45 AM". The time zone is "CST (hh:mm AM/PM)".
- End Date:** A date input field with "1/29/2015" and a time input field with "11:45 AM". The time zone is "CST (hh:mm AM/PM)".
- Note:** A large text area with a vertical scrollbar. Below it, the text "Maximum length of text is 200 characters" is displayed.
- Event Status:** A dropdown menu with the selected option "Confirmed".
- Authorizer:** A dropdown menu with the selected option "Associate, Andrew".
- Notification Options:** Three radio buttons:
 - Send online/fax notifications
 - Send online/fax and force email for online notifications
 - Do not send any notifications
- Continue >>** A blue button with white text.

11. Select an event type from the Event Type drop-down.

12. Enter the event name in the Event Name field.

13. Enter the location of the event in the Location field.

14. Enter your beginning date/time in the Begin Date/Time fields.

15. Enter your end date/time in the End Date/Time fields.
16. Choose the event status from the Event Status drop-down.
17. Choose the authorizing attorney for the event from the Authorizer drop-down.
18. Select the radio button to choose your notification options.
19. Click **Continue** to choose parties for notification.

< Prev 1 through 3 of 3 Next > [Show Parties](#) **Continue >>**

<input type="checkbox"/>	Attorney	Firm
<input type="checkbox"/>	Attorney, Adam (representing 1 party) (This person is the event creator)	Mock Firm A-Bellevue
<input type="checkbox"/>	Brown, Judge (representing 0 parties)	Mock Court-Filing & Serving
<input type="checkbox"/>	Lawyer, Lucy (representing 1 party)	Mock Firm B

< Prev 1 through 3 of 3 Next > [Show Parties](#) **Continue >>**

Please select persons to notify and click continue to submit your event. **Continue >>**

20. Click the checkboxes next to the attorneys who you would like notified.
21. Click **Continue** to move to the Review Information screen.

Transaction ID: 54691173
Court: Mock Court-Filing & Serving
Case Number: 15CV12345
Case Name: Smith, James vs A B C Auto Inc

Event Creator: Attorney, Adam
Event Authorizer: Associate, Andrew

Event Type: am 10:45 hearing
Event Name: Hearing on Motion for Summary Judgment
Location:
Begin Date: Jan 29, 2015 10:45 AM CST
End Date: Jan 29, 2015 11:45 AM CST
Note:
Event Status: Confirmed

Notifications (2) [Show Selected](#)

Review the information and click Submit Event. **Submit Event**

22. Once you have reviewed the information for the event click on **Submit Event** to add this item to the Calendar.
23. The screen will display that your event was **created successfully** and you can then click on Calendar Home to add/search for another Calendar Event.

Transaction ID: 54691173
Court: Mock Court-Filing & Serving
Case Number: 15CV12345
Case Name: Smith, James vs A B C Auto Inc

Event Creator: Attorney, Adam
Event Authorizer: Associate, Andrew

Event Type: am 10:45 hearing
Event Name: Hearing on Motion for Summary Judgment
Location:
Begin Date: Jan 29, 2015 10:45 AM CST
End Date: Jan 29, 2015 11:45 AM CST
Note:
Event Status: Confirmed

Notifications (2) [Show Selected](#)

Event created successfully. [Calendar Home](#)