Odyssey® File & Serve

Firm Administrator Guide – Release 3.1

Copyright and Confidentiality

For assistance, contact Tyler Technologies through the following resource numbers.

Resource	Contact Information
Main (Reception) Telephone	972.713.3770
Main (Reception) Fax	972.713.3777
Odyssey File & Serve Telephone	800.297.5377
Odyssey File & Serve E-mail	efiling.support@tylertech.com
Odyssey File & Serve Website	odyssey.tylertech.com
Odyssey File & Serve Support Hours	7 a.m. to 7 p.m. (CT), Monday through Friday

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1 Odyssey® File & Serve Overview

The Odyssey File & Serve solution enables registered users from the legal community to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

2 Before You Begin

Topics Covered in this Chapter

♦ System Requirements
♦ Page Navigation
♦ Error Messages

Before you begin using File & Serve, there are several items you should be aware of to assist you with successful operation of your software.

System Requirements

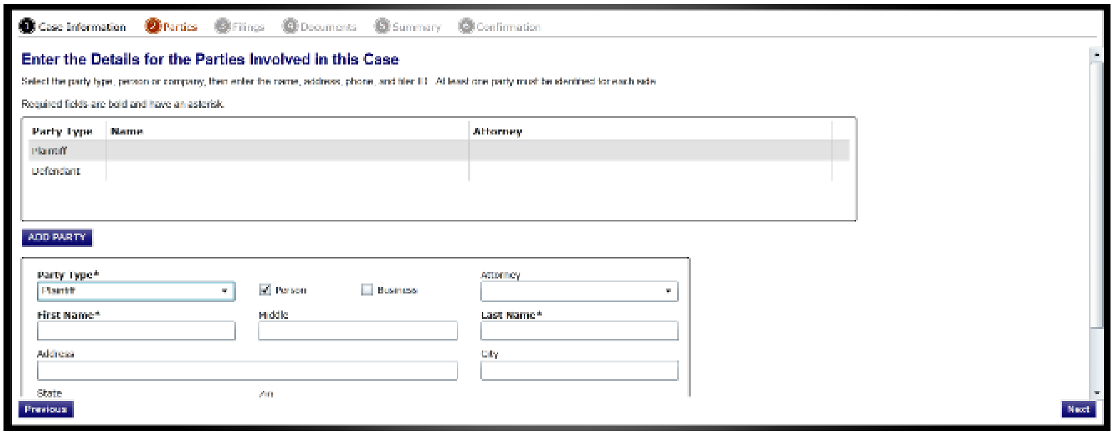
This section describes the recommended system requirements to successfully use File & Serve.

- Browser Requirements – File & Serve supports current versions of the Windows operating system using Internet Explorer 7 or above, and Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- Connection Requirements – A high-speed Internet connection is recommended.
- Minimum Screen Resolution – For best results, a setting of 1024 x 768 or better is highly recommended. If necessary, users can set their monitors to 800 x 600 pixels but doing so may compromise the graphic display.
- File & Serve supports documents in the following formats: .doc, .docx, .wpd, .tiff, and .pdf. The .pdf format is recommended.

Page Navigation

The following describes how to navigate File & Serve and populate data fields throughout the filing process.

Figure 2.1 – Enter Party Details



Navigate with Breadcrumbs

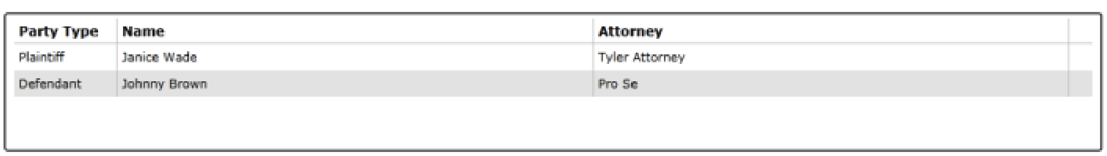
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.

Figure 2.2 – Breadcrumb Navigation

Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.

Figure 2.3 – Data Table

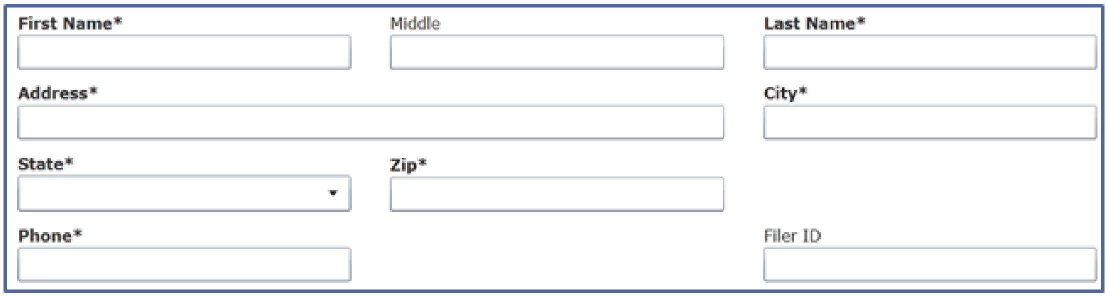


Party Type	Name	Attorney
Plaintiff	Janice Wade	Tyler Attorney
Defendant	Johnny Brown	Pro Se

Enter User Information

The user information you enter or select populates the data table.

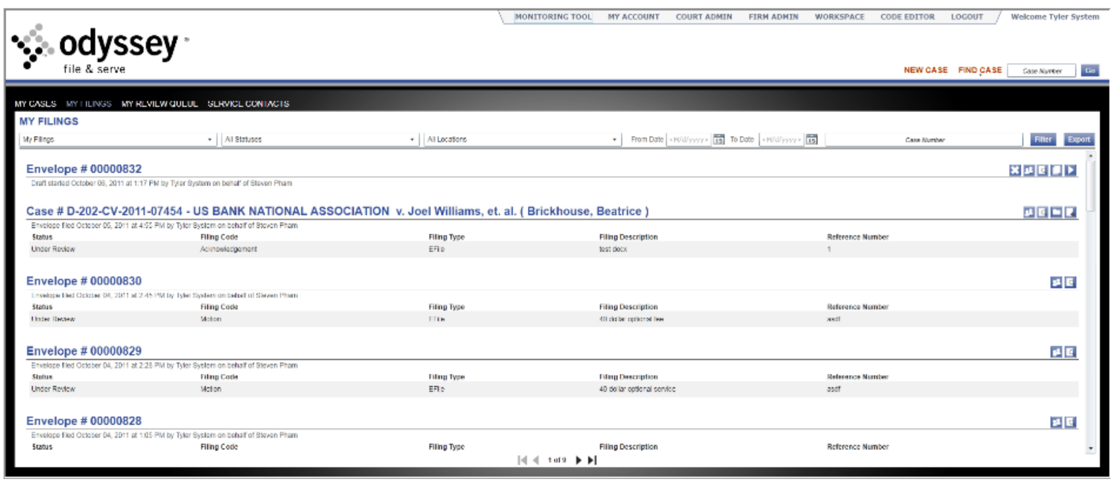
Figure 2.4 – Data Fields



Resume Filing

At any point in the filing process, File & Serve automatically saves a draft of those pages where all required fields have been completed. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click WORKSPACE the link at the top of the page, find your case on the **MY FILINGS** screen, and click the icon to resume your filing.

Figure 2.5 – File & Serve Workspace



Error Messages

File & Serve displays several error messages to alert users when required information is not entered or invalid information is provided.

Enter Data in Required Fields

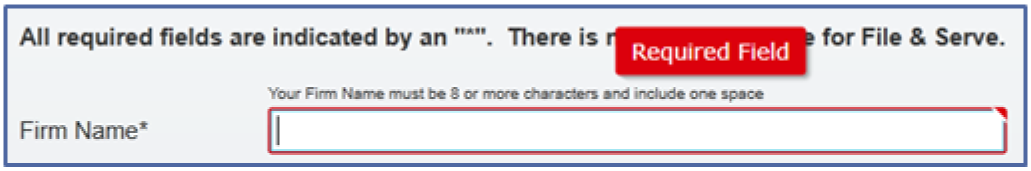
Required fields are those that contain an asterisk **(*)** next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages similar to the figures shown below.

Note: Required fields may vary in different sections.

When a red outline displays around a field, this means you did not enter the required information into the field.

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays. See the example in the figure below.

Figure 2.6 – Required Field Error Message

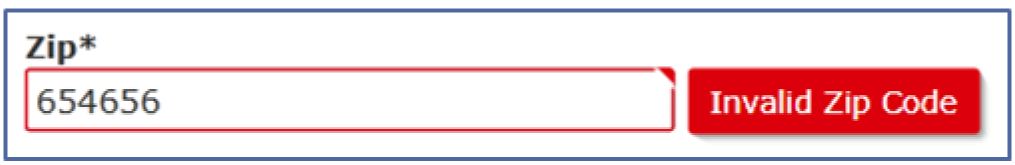


Receive Error Messages

When File & Serve displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays. See the example in the figure below.

Figure 2.7 – Invalid Entry Error Message



Session Expired Due to Inactivity

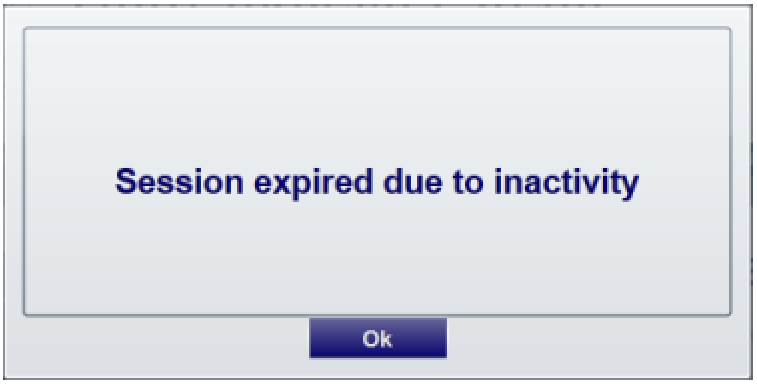
Note: File & Serve displays a warning message stating you will be logged off in 5 minutes before your session expires.

You can click the Continue button to prevent your session from expiring.

The system automatically logs you off after 30 minutes of inactivity, and a **Session expired due to inactivity** notification displays on your screen.

Click the Ok button, to return to the login window.

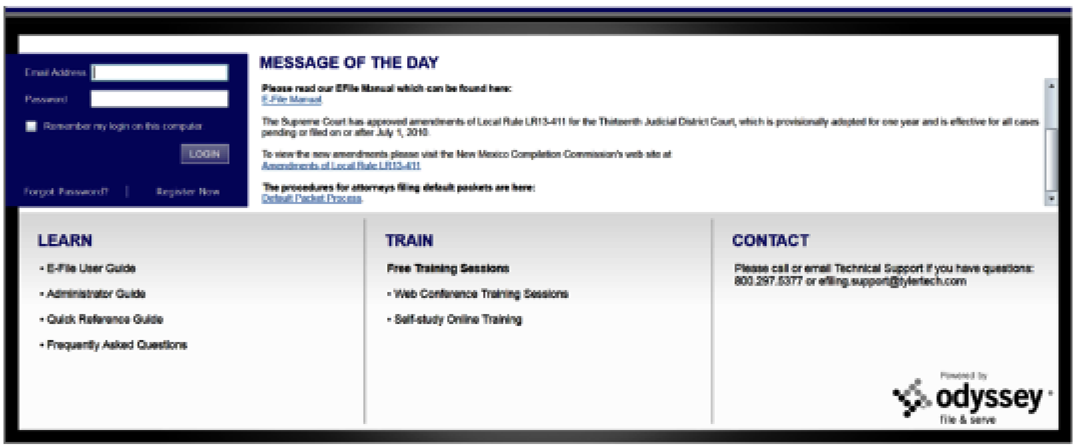
Figure 2.8 – Session Expired Due to Inactivity Notice



3 File & Serve Home Page

The File & Serve Home page serves as the gateway to the File & Serve system. From this screen, you can register, log in, and read your court's **Message of the Day**, access the user guides, training sessions and get contact information for Technical Support.

Figure 3.1 – File & Serve Home Page



Login

The Login window allows the user to log in and use the File & Serve system. The user can log in to File & Serve by entering their email address and password.

Message of the Day

The **Message of the Day** provides important messages from your court. Check this section daily for important messages from the court.

Learn

The Learn section has links to the File & Serve user documentation. There are four types of documents available to help you answer many of your day-to-day operation questions. They are as follows:

- The **File & Serve User Guide** provides step-by-step instructions on using the File & Serve system. The User Guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, how to e-file and serve, and changing your user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm, managing user, payment, and attorney accounts, and creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common File & Serve tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.

- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to File & Serve functionality.

Train

File & Serve offers free regularly scheduled on-line training for File & Serve. You can register for training on-line and download User Manual.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

The File & Serve Technical Support Team is available to assist all users by calling 1.800.297.5377, Monday through Friday between the hours of 7 a .m. to 7 p.m. Central Time. You can also e-mail a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com.

Registration

Registration is the process of registering a user in the system using their name, contact and payment information. File & Serve requires all users–whether firm administrators, attorneys, or individuals representing themselves–to be registered in the system.

4 File & Serve Registration

Topics Covered in this Chapter

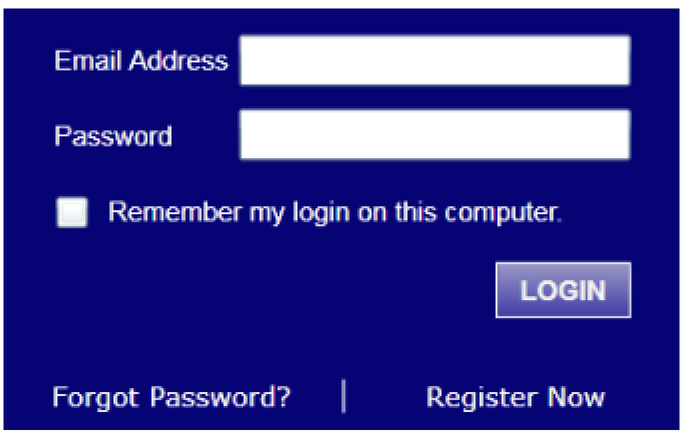
♦ Registering as a New Firm

Registration is the process of registering a user in the system using their name, contact and payment information. File & Serve requires all users–whether firm administrators, attorneys, or individuals representing themselves–to be registered in the system.

Registering as a New Firm

File & Serve enables each firm to designate a person within the firm to administer the E-filing system. The administrator registers the firm and is responsible for setting up and maintaining all user, payment, and attorneys accounts.

Figure 4.1 – File & Serve Login Screen



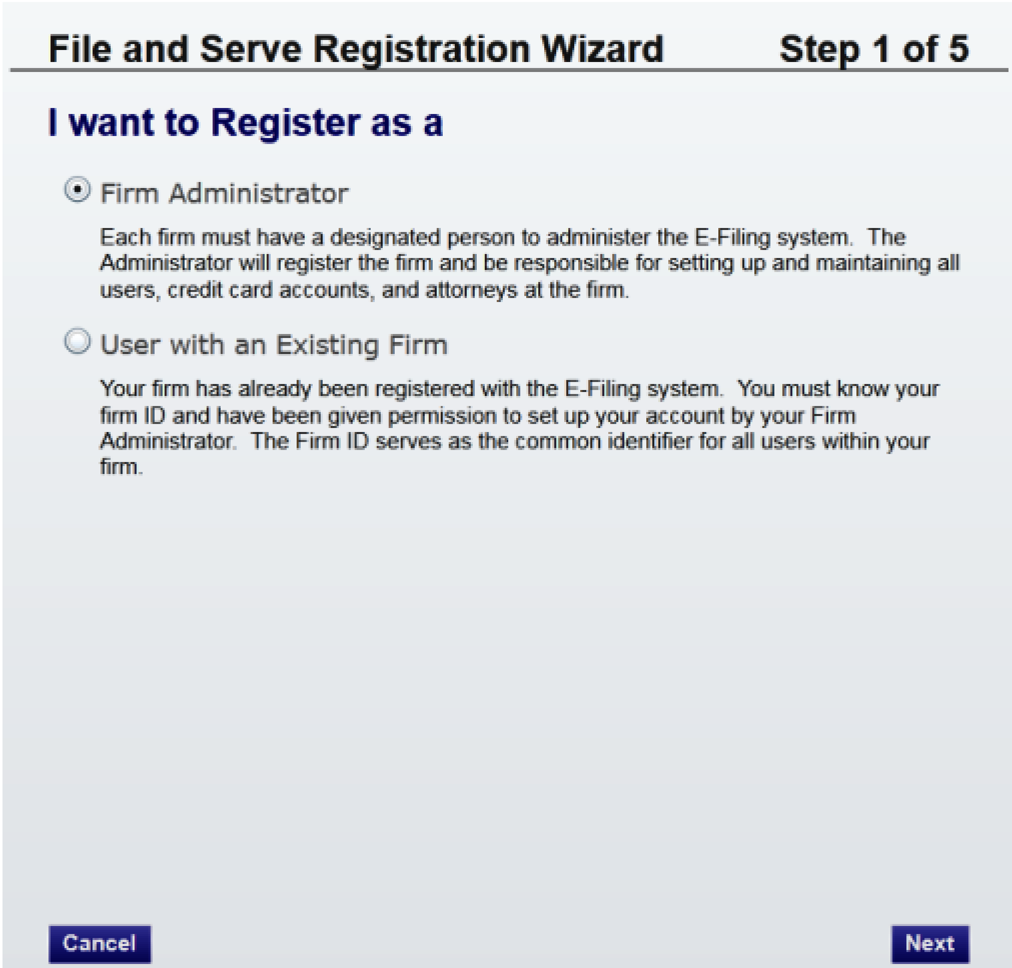
Perform the following steps to register your firm as a new firm:

1. Click the Register Now link on the login screen.

   Note: There is no fee to sign up for File & Serve.

2. Select Firm Administrator the option.

Figure 4.2 – File & Serve Registration Wizard (Step 1 of 5)

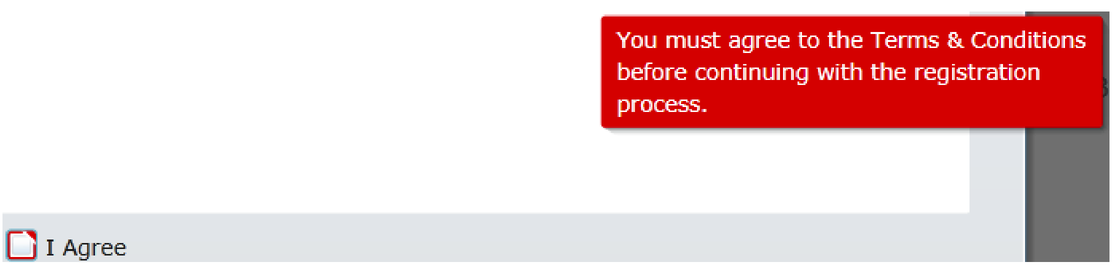


3. Click the **Next** button to continue, or click the **Cancel** button to cancel the registration process.
4. Read the Terms and Conditions for using File & Serve.

Figure 4.3 – File and Serve Registration Wizard (Step 2 of 5)

Note: You must agree to the Terms and Conditions before continuing with the registration process or you will receive the following error message:

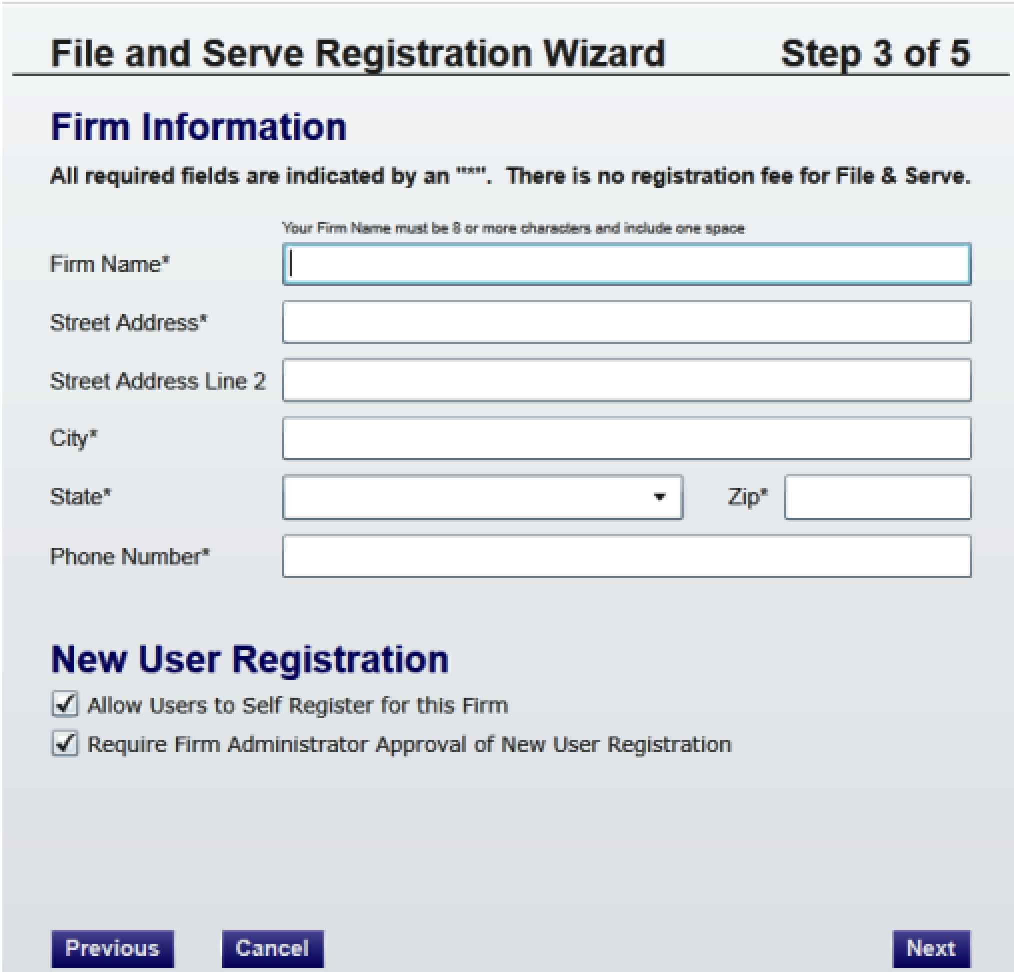
Figure 4.4 – Error Message — Agree to Terms & Conditions



5. Select the I Agree check box to accept the Terms and Conditions for using File & Serve.
6. Click the **Next** button to continue, or click the **Cancel** button to cancel the registration process.
7. Complete the **Firm Information** form.

Note: *indicates a required field.

Figure 4.5 – File and Serve Registration Wizard (Step 3 of 5)



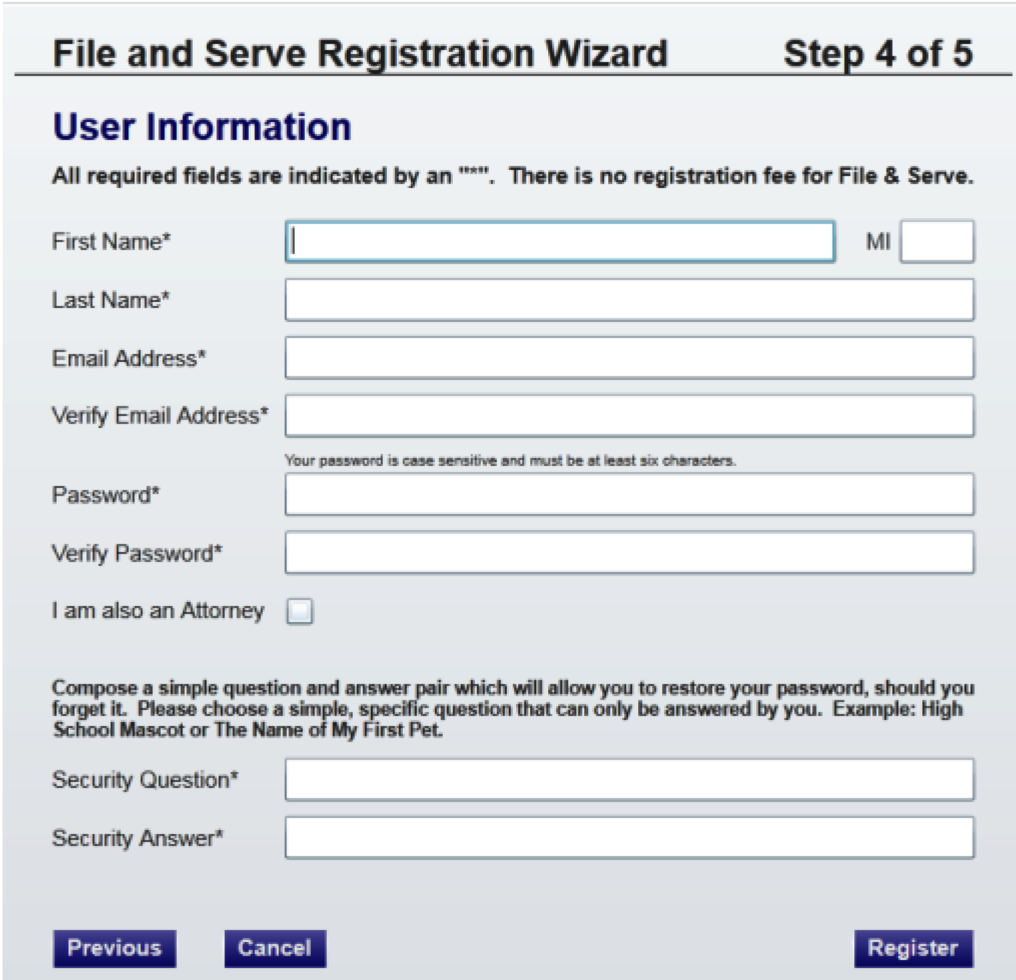
8. Select the **Allow Users to Self Register for this Firm** check box to allow the firm user to register to use File & Serve without contacting a firm administrator.

9. Select the **Require Firm Administrator Approval of New User Registration** check box to have the option to approve every firm user that registers to use File & Serve.

10. Click the Next button to continue; click the Previous button to return to the previous screen; or click the Cancel button to cancel the registration process.

11. Complete the **User Information** form.

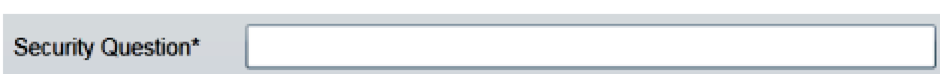
Figure 4.6 – File and Serve Registration Wizard (Step 4 of 5)



12. Enter a question in the **Security Question*** field.

    File & Serve requests your security question to restore your password in case you forget your password.

Figure 4.7 – Security Question



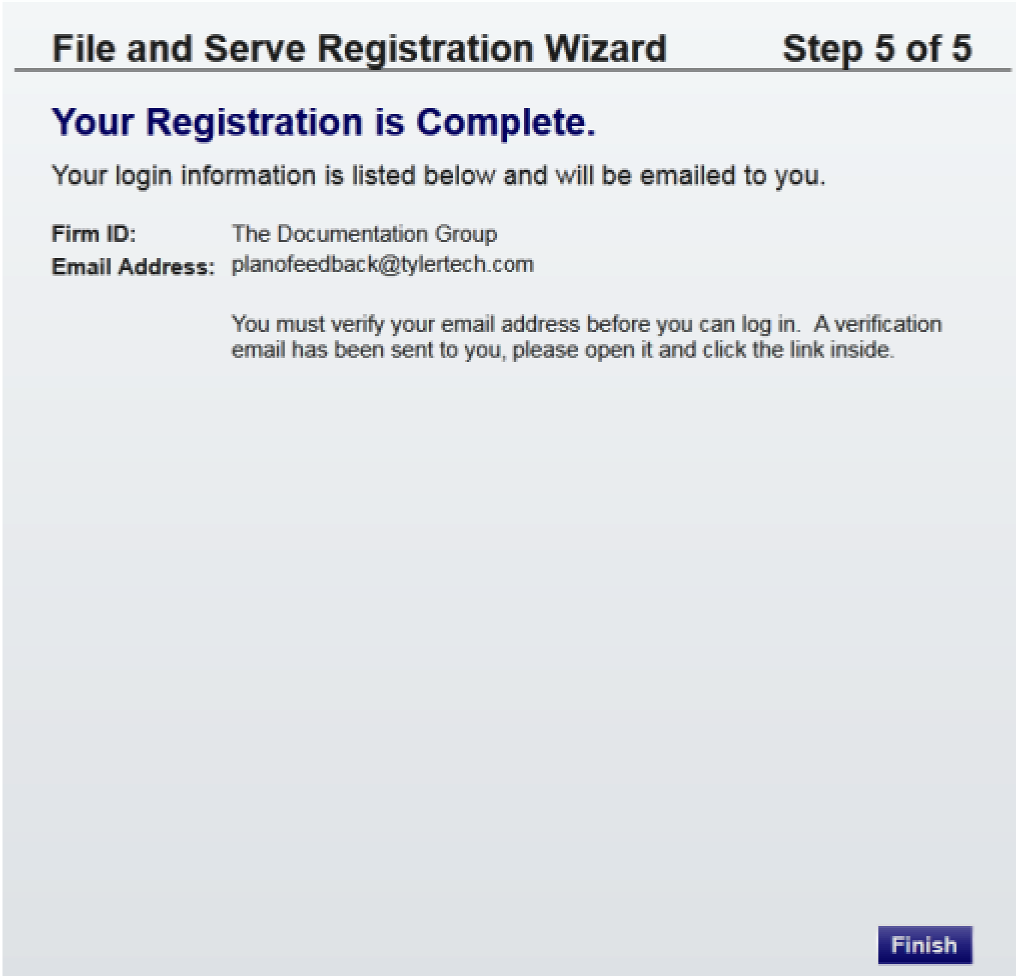
13. Enter a response in the **Security Answer** * field.

Figure 4.8 – Security Answer

14. Click the **Register** button.

    File & Serve displays **Your Registration is Complete.** message on the screen.

Figure 4.9 – Registration Complete Confirmation Screen



15. Click the Finish button to continue.

Note: You must verify your e-mail address to complete the registration process. A verification e-mail will be sent to you; open the e-mail and click the link to confirm your e-mail address.

Your registration is now complete, go to your home page to log in to use File & Serve.

5 File & Serve Login and Logout

Topics Covered in this Chapter

♦ Logging into File & Serve
♦ Logging out of File & Serve

All users are required to log into File & Serve to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out of File & Serve after they have completed their transactions.

Logging into File & Serve

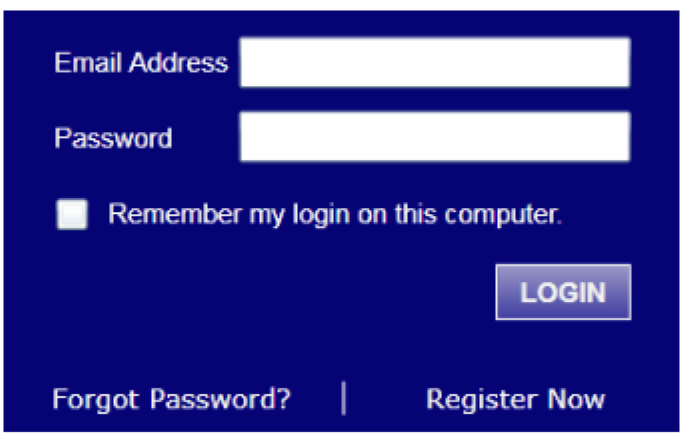
You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to use File & Serve.

Select Register Now to register if you have not registered to use File & Serve.

Perform the following steps to log in to e-file and serve a case:

1. Go to your File & Serve home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

Figure 5.1 – File & Serve Login Screen



3. Select the Remember my login on this computer. check box to save your login on your computer.
4. Click the LOGIN button.

Note: After five failed attempts to log in to the system, your account will be locked. To unlock the account, contact your Firm Administrator to reactivate your account.

Once you have successfully logged in, you can begin to use File & Serve.

Logging out of File & Serve

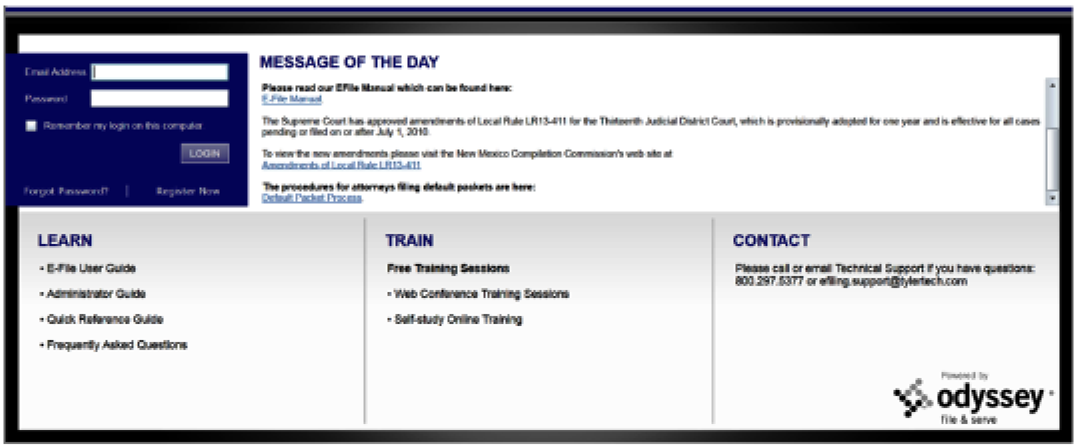
This section describes how to properly log out of File & Serve.

Perform the following steps to log out of File & Serve:

1. Select the LOGOUT link at the top right corner of the page.

   Selecting the link automatically logs you out of File & Serve.
2. Return to the File & Serve home page to log in to the system.

Figure 5.2 – File & Serve Home Page



6 Firm Administrator Functions

Topics Covered in this Chapter

♦ Manage New Users
♦ Manage Firm User Accounts
♦ Manage Attorney Accounts
♦ Manage Payment Accounts
♦ Manage Firm Information

Firm administrators are responsible for managing users, attorneys, payments and updating firm information.

Manage New Users

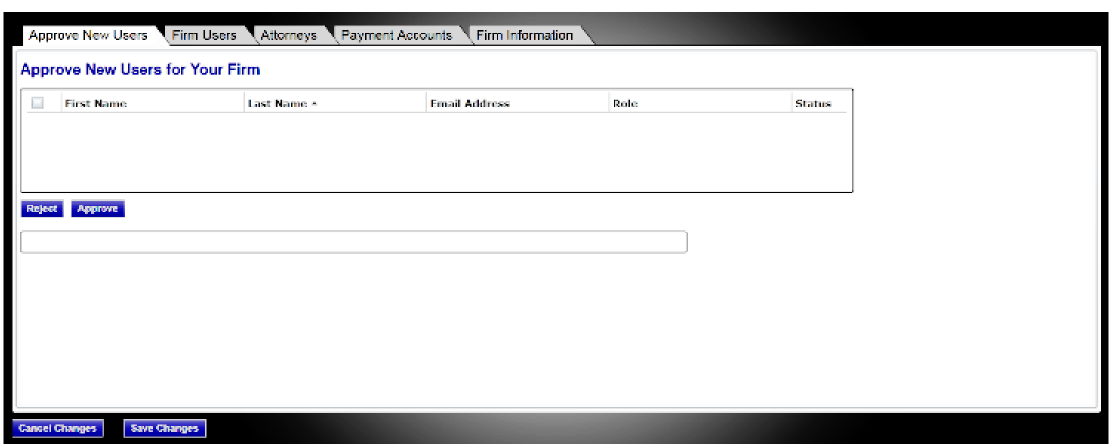
When a new user registers for File & Serve, the administrator receives notification to either approve or reject the request for an account.

Approving and Rejecting New Users

The Firm Administrator approves or rejects new users for the firm. When a user registers for the system, the Firm Administrator receives notification a user has registered and has requested to be added to the firm.

Note: You must be a Firm Administrator to use this feature.

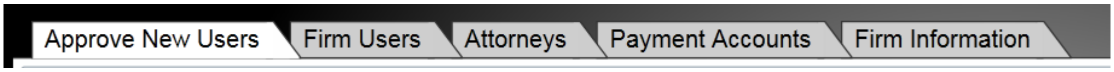
Figure 6.1 – Approve New Users for Your Firm



Perform the following steps to accept or reject new users for your firm:

1. Select the **FIRM ADMIN** link on the top menu.
2. Select the **Approve New Users** tab.

Figure 6.2 – Approve New Users



3. Select the user from the list to approve or reject.

4. Click the **Approve** button to approve the new user, or click the **Reject** button to reject the new user.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Manage Firm User Accounts

The Firm Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, as well as activating and deactivating user accounts for firm users.

Adding Firm User Accounts

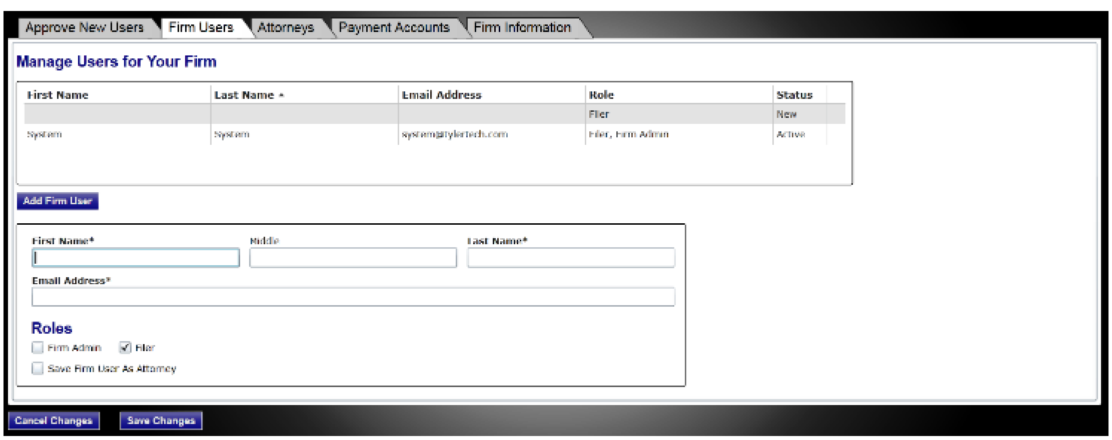
Note: * indicates a required field.

Perform the following steps to add new users to the firm's account:

1. Select the **FIRM ADMIN** link on the top menu.

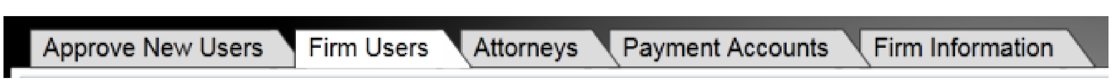
   The firm administrator function screens opens.

Figure 6.3 – Firm Users Screen



2. Select the **Firm Users** tab.

Figure 6.4 – Firm Users Tab Selected



3. Click the **Add Firm User** button.
4. Complete the **Add Firm User** form.
5. Assign a new firm user role:

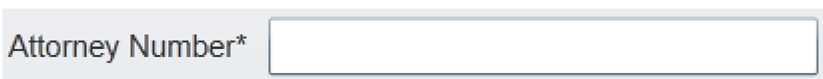
   a. Select ☑ Firm Admin to assign the Firm Administrator role to the new firm user.

   b. Select ☑ Filer to assign the Filer role to the new firm user.

6. Select ☑ Save Firm User As Attorney to allow the attorney to use the File & Serve system for filings.

   Note: Enter the **Attorney Number*** if the user was saved as an attorney.

Figure 6.5 – Attorney Number field



7. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

File & Serve displays the new user information at the top of the screen.

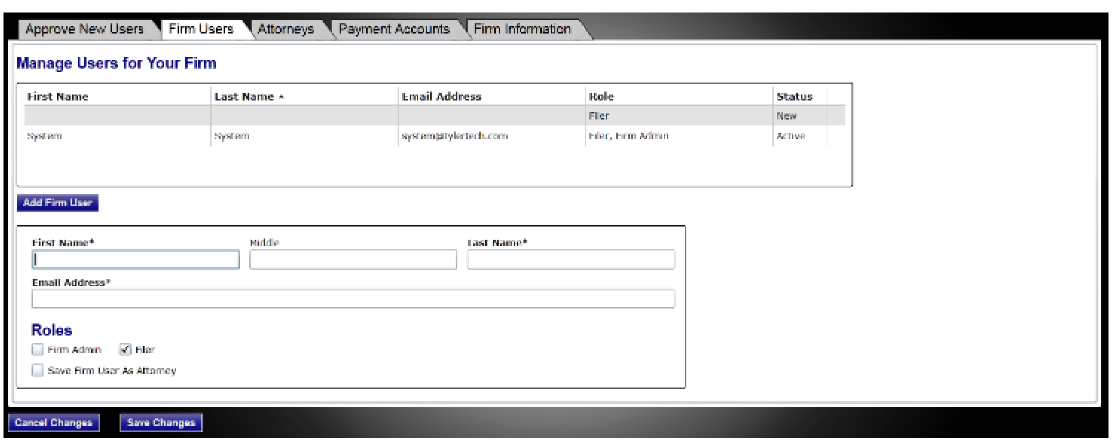
Editing Firm User Accounts

Perform the following steps to edit firm user account information:

1. Select the **FIRM ADMIN** link on the top menu.

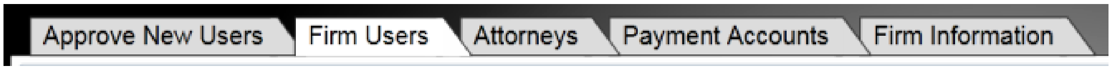
   The firm administrator function screens opens.

Figure 6.6 – Firm Users Screen



2. Select the **Firm Users** tab.

Figure 6.7 – Firm Users tab selected



3. Select the firm user you want to edit from the list.
4. Edit the information in the form.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

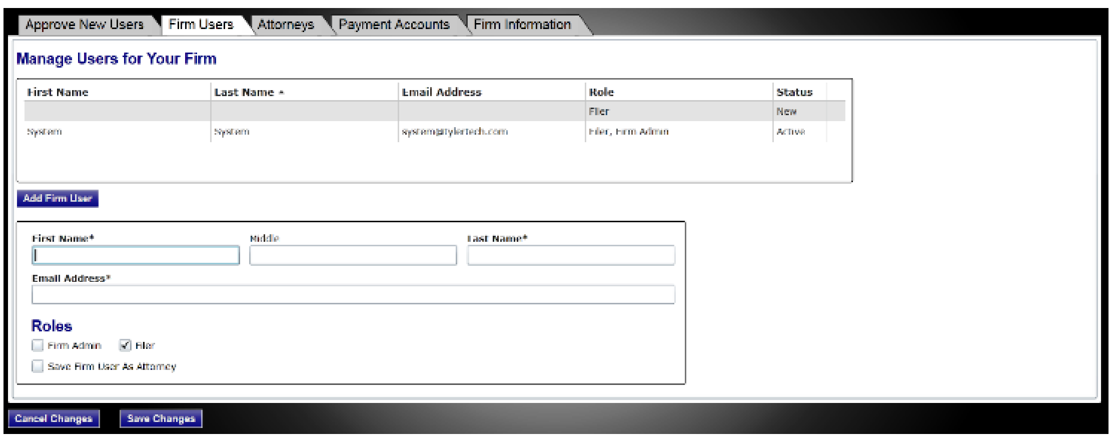
Deleting Firm User Accounts

Perform the following steps to delete a firm user account:

1. Select the **FIRM ADMIN** link on the top menu.

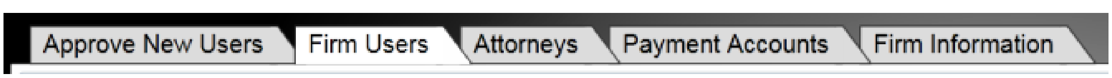
   The firm administrator function screens opens.

Figure 6.8 – Firm Users



2. Select the **Firm Users** tab.

Figure 6.9 – Firm Users Tab Selected



3. Select the firm user to delete on the list.
4. Click the  button to delete the user from the list.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Assigning Firm User Roles

The Firm Administrator assigns users different roles in the system. Users can be assigned the role of a Firm Administrator, Filer or Attorney.

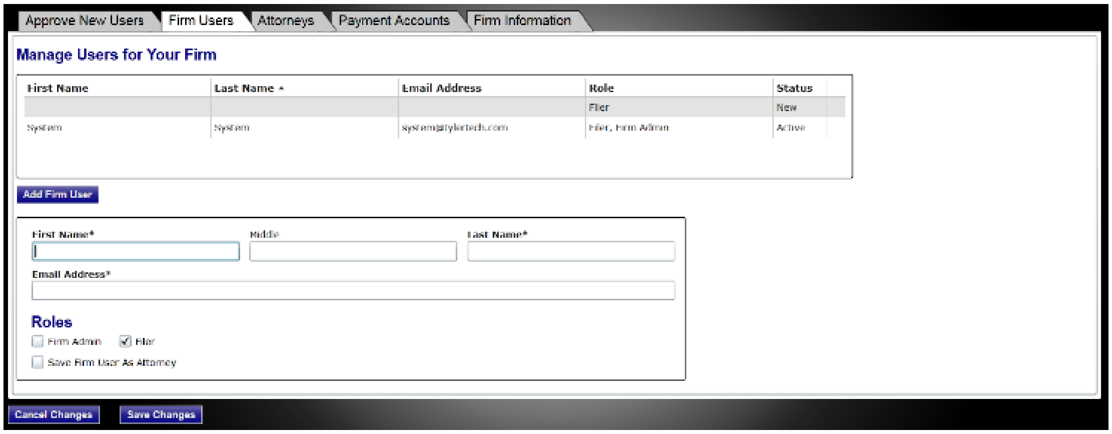
Note: * indicates a required field.

Perform the following steps to assign a user role:

1. Select the **FIRM ADMIN** link on the top menu.

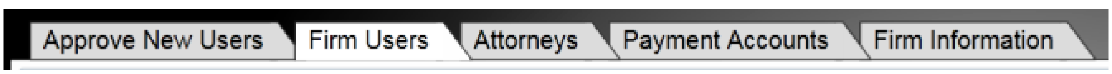
   The firm administrator function screens opens.

Figure 6.10 – Firm Users Screen



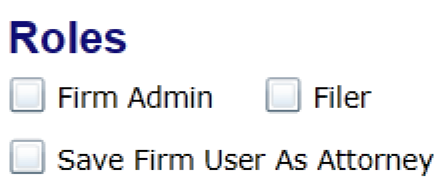
2. Select the **Firm Users** tab.

Figure 6.11 – Firm User Tab Selected



3. Assign roles to a firm user:

Figure 6.12 – Firm User Roles



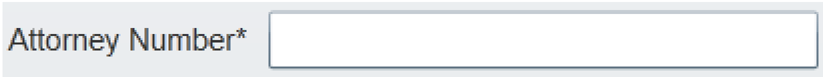
   a. Select ☑ Firm Admin to assign the Firm Administrator role to the new firm user.

   b. Select ☑ Filer to assign the Filer role to the new firm user.

   c. Select ☑ Save Firm User As Attorney to allow the attorney to use the File & Serve system for filings.

   Note: Enter the **Attorney Number*** if the user was saved as an attorney.

Figure 6.13 – Attorney Number field



4. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

File & Serve displays the new firm user information at the top of the screen.

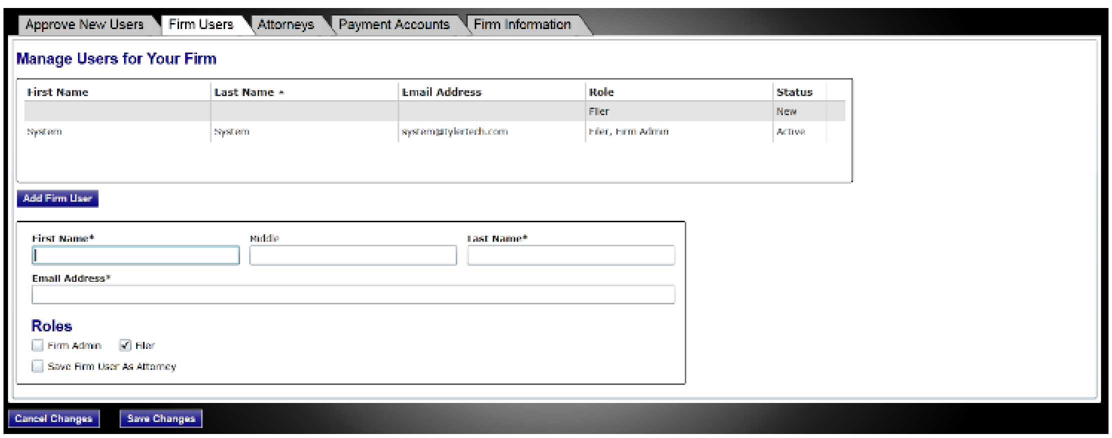
Removing Firm User Roles

Perform the following steps to remove a firm user role:

1. Select the **FIRM ADMIN** link on the top menu.

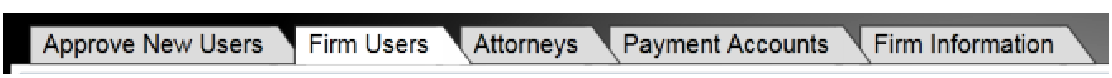
   The firm administrator function screens opens.

Figure 6.14 – Firm Users Screen



2. Select the **Firm Users** tab.

Figure 6.15 – Firm Users Tab Selected



3. Select the user name from the list.
4. Remove the firm user roles:

   a. Clear the ☑ Firm Admin checked box to remove the Firm Administrator role from the user.

   b. Clear the ☑ Filer checked box to remove the Filer role from the user.

   c. Clear the ☑ Save Firm User As Attorney checked box to remove the attorney role from the user.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

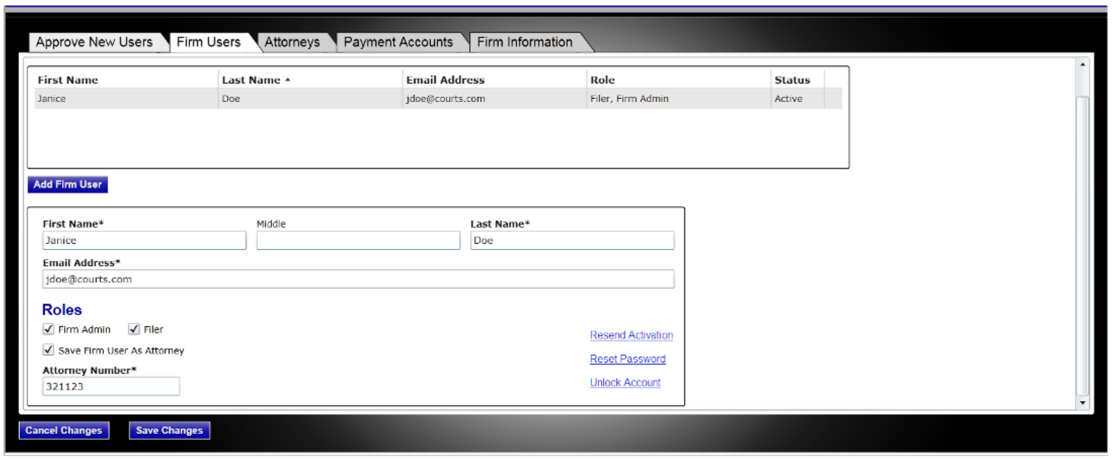
File & Serve removes the roles associated with the user's name.

Resending Activation E-mail

This feature allows the Firm Administrator to resend the activation e-mail for the selected account. Use this feature in situations where the user did not receive the initial activation e-mail or the e-mail address has to be corrected in order to activate the user account. This feature is only available if the account status is "UnVerified".

Note: You must be a Firm Administrator to use this feature.

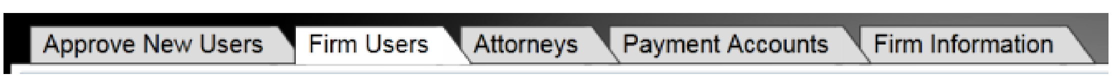
Figure 6.16 – Resend Activation Link



Complete the following steps to resend the activation e-mail to the user:

1. Select the **Firm Users** tab.

Figure 6.17 – Firm Users tab selected



2. Select the Resend Activation link.

   This feature sends the initial activation e-mail previously sent to the user when the Firm Administrator created the new user account.

3. Instruct the user to check the e-mail account for an e-mail with the account activation information.

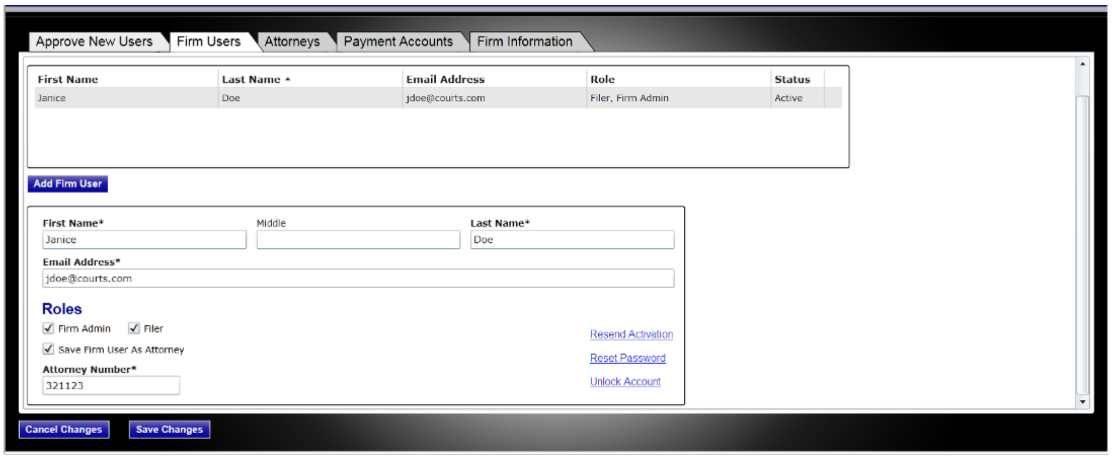
Note: This e-mail includes a link to activate the account as well as the newly system-generated user password.

Resetting User Passwords

This feature allows the Firm Administrator to manually reset the user password. The Firm Administrator manually sends or gives the user the new password as the system will not automatically send an e-mail to the user. This feature is available when the account status is “Active”.

Note: You must be a Firm Administrator to use this feature.

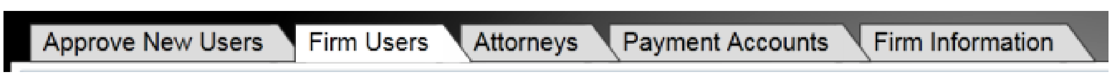
Figure 6.18 – Reset Password Link



Complete the following steps to manually reset the user password:

1. Select the **Firm Users** tab.

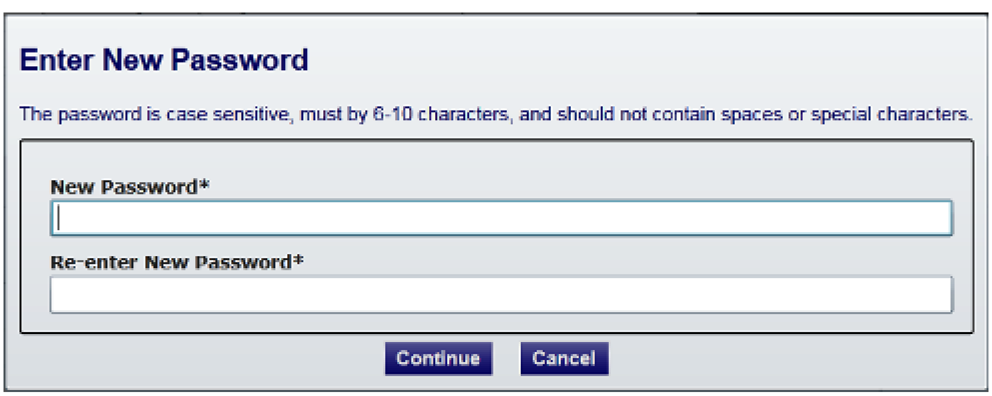
Figure 6.19 – Firm Users tab selected



2. Select the Reset Password link.

   The **Enter New Password** window opens.

Figure 6.20 – Enter New Password



3. Enter a new password in the **New Password** field.

Note: Passwords are case sensitive. A password must be six to ten characters long, and should not contain any spaces or special characters.

4. Reenter the new password in the **Reenter New Password** field.

5. Click the Continue button to continue, click the Cancel button to cancel the new password process.

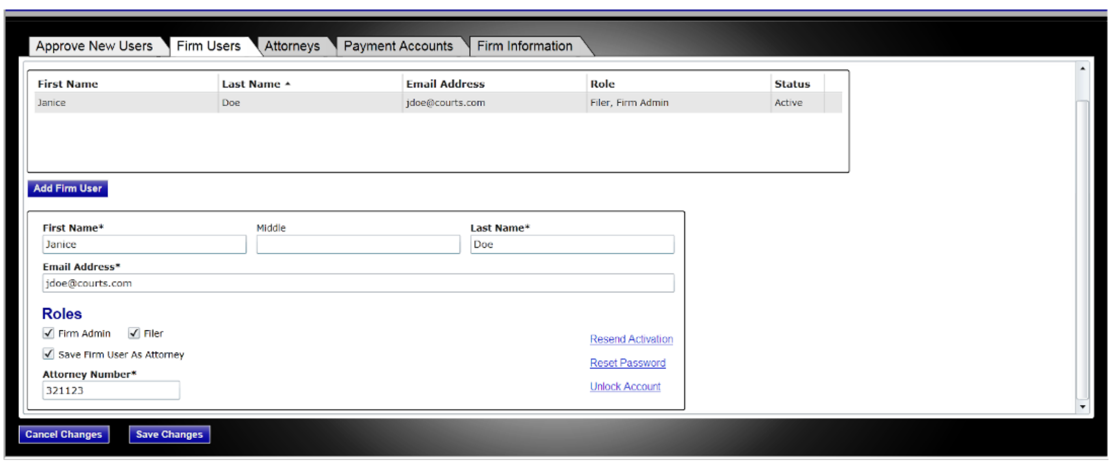
Note: The Firm Administrator manually sends an email, or contacts the user with the new password, as the system will not automatically send the user an e-mail with the new user password.

Unlocking User Account

This feature allows the Firm Administrator to unlock a user's account. An account is locked after five unsuccessful attempts at logging in. The Firm Administrator manually enters a new password for the user. Once the Firm Administrator has unlocked the account, they must send the new password to the user. This feature is only available when the account status is "Locked".

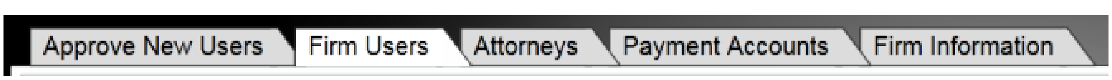
Note: You must be a Firm Administrator to use this feature.

Figure 6.21 – Unlock Account Link



1. Select the **Firm Users** tab.

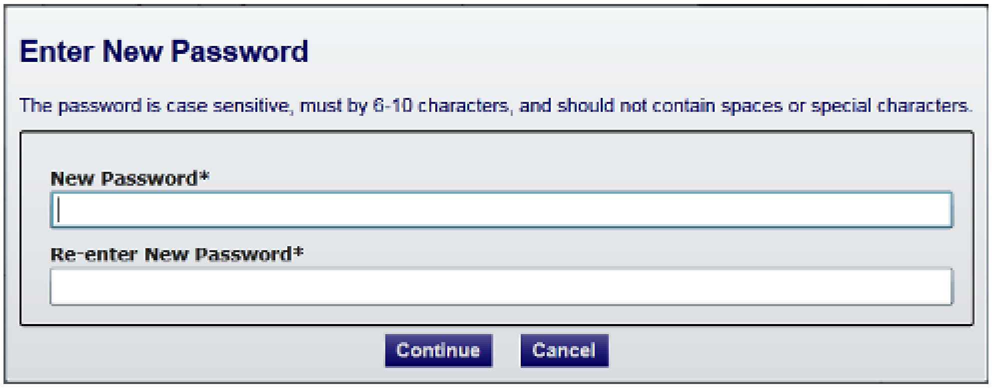
Figure 6.22 – Firm Users tab selected



2. Select the Unlock Account link.

   The **Enter New Password** window opens.

Figure 6.23 – Enter New Password



3. Enter a new password in the **New Password** field.

   Note: Passwords are case sensitive. A password must be six to ten characters long, and should not contain any spaces or special characters.

4. Reenter the new password in the **Re-enter New Password** field.

5. Click the Continue button to continue, click the Cancel button to cancel the new password process.

Note: The Firm Administrator must manually send an email or contact the user with the new password, as the system will not automatically send the user an e-mail with the new user password.

Manage Attorney Accounts

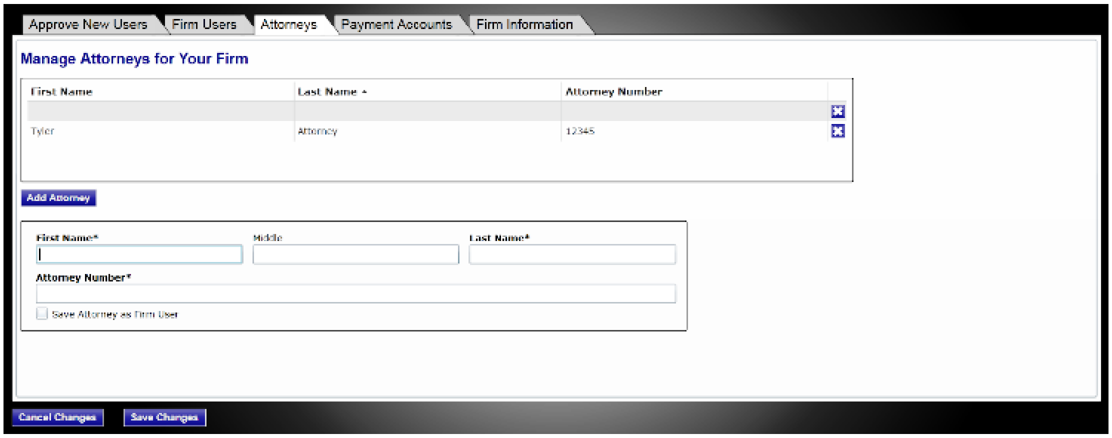
The Firm Administrator is responsible for managing attorney accounts.

Adding Attorney Accounts

The Firm Administrator can add attorneys to the firm's user accounts.

Note: You must be a Firm Administrator to perform this task.

Figure 6.24 – Attorneys tab



Perform the following steps to add an attorney to the Attorney List:

1. Select **FIRM ADMIN** on the top menu.
2. Select the **Attorneys** tab.

Figure 6.25 – Attorneys tab selected

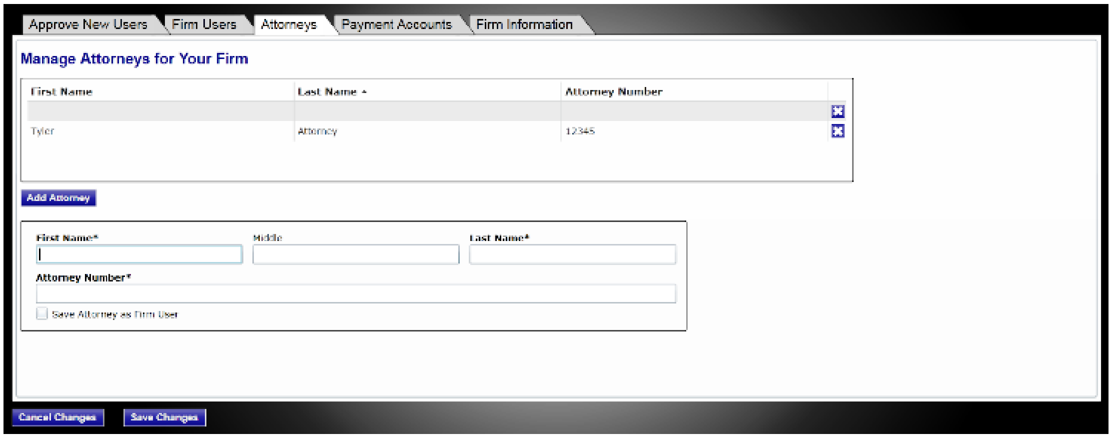
3. Click the Add Attorney button.
4. Complete the **Add Attorney** form.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

Editing Attorney Accounts

The Firm Administrator can edit the attorney's information using the **Attorneys** screen.

Note: You must be a Firm Administrator to perform this task.

Figure 6.26 – Attorneys Tab



Perform the following steps to edit the information entered for each attorney:

1. Select the **FIRM ADMIN** link on the top menu.
2. Select the **Attorneys** tab.

Figure 6.27 – Attorneys tab selected

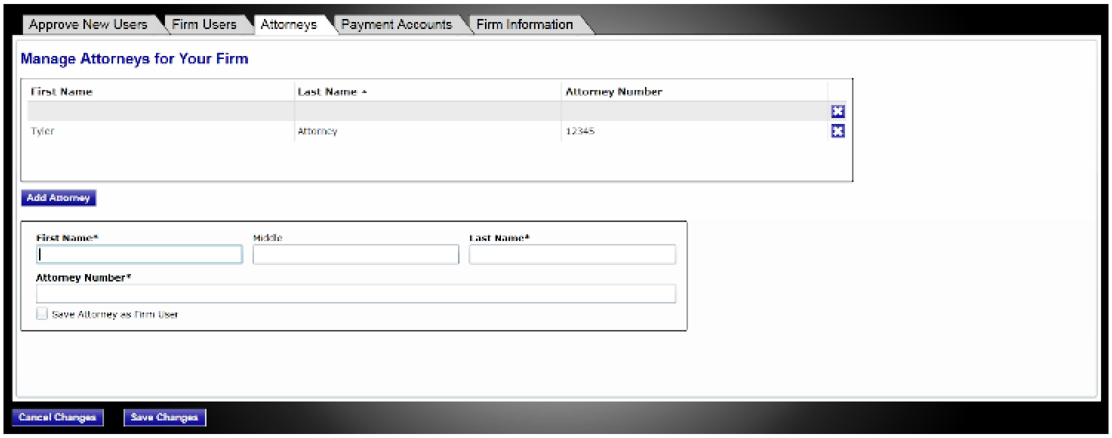
3. Select the firm user you want to edit from the list.
4. Edit the information in the form.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Attorney Account

The Firm Administrator can delete an attorney's account using the **Attorneys** screen.

Note: You must be a Firm Administrator to perform this task.

Figure 6.28 – Attorneys



Perform the following steps to delete an attorney account:

1. Select **FIRM ADMIN** on the top menu.
2. Select the **Attorneys** tab.

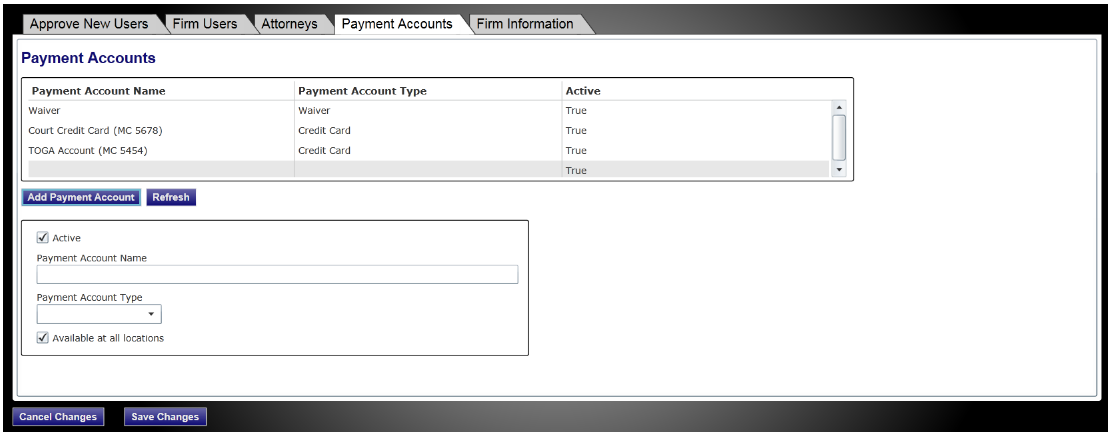
Figure 6.29 – Attorneys tab selected

3. Select the attorney you want to delete from the list.
4. Click the button next to the attorney's name to delete the attorney from the list.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Manage Payment Accounts

The Firm Administrator is responsible for managing payment accounts for vendors and statutory filing fees. Firms can have multiple payment accounts if needed. File & Serve accepts American Express, Discover, Master Card, Visa, and waivers as valid forms of payment.

Figure 6.30 – Payment Accounts screen

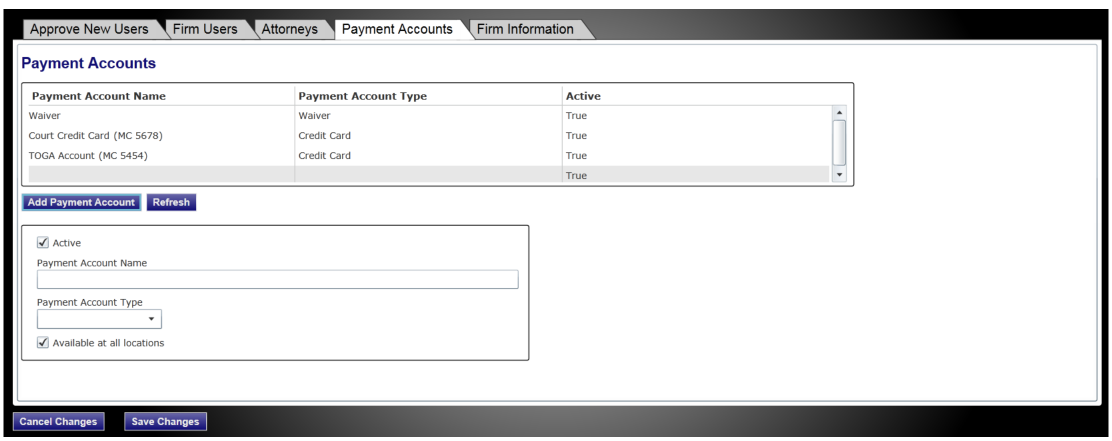


Adding Payment Accounts

File & Serve requires all firms to have a payment account. The Firm Administrator adds payment accounts for the firm.

Note: You must be a Firm Administrator to perform this task.

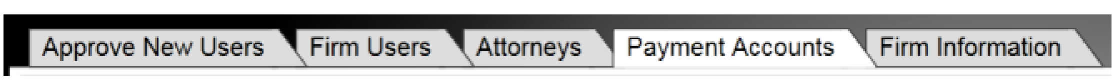
Figure 6.31 – Payment Accounts



Perform the following steps to add payment accounts for your firm:

1. Select **FIRM ADMIN** on the top menu.
2. Select the **Payment Accounts** tab.

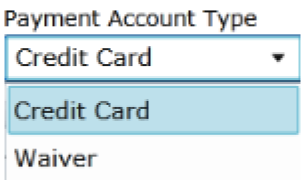
Figure 6.32 – Payment Accounts tab selected



3. Click the **Add Payment Account** button.
4. Complete the **Add Payment Account** form:

a. Select ✓ Active to activate the payment account.
b. Enter a payment account name.
c. Select a payment account type (credit card or waiver) using the drop-down list.

Figure 6.33 – Select Payment Account Type



d. Select **Waiver** if the payment account is a waiver.
e. Select **Credit Card** if the payment account is a credit card.
f. Click the **Enter Credit Card Information** button to enter your credit card information.

Note: File & Serve may re-direct you to a secure payment processing site to enter your credit card information.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

   File & Serve displays the payment account information at the top of the screen.

Deactivating Payment Accounts

Perform the following steps to deactivate firm payment accounts:

1. Select the **FIRM ADMIN** link on the top menu.
2. Select the **Payment Account** tab.

Figure 6.34 – Payment Accounts tab

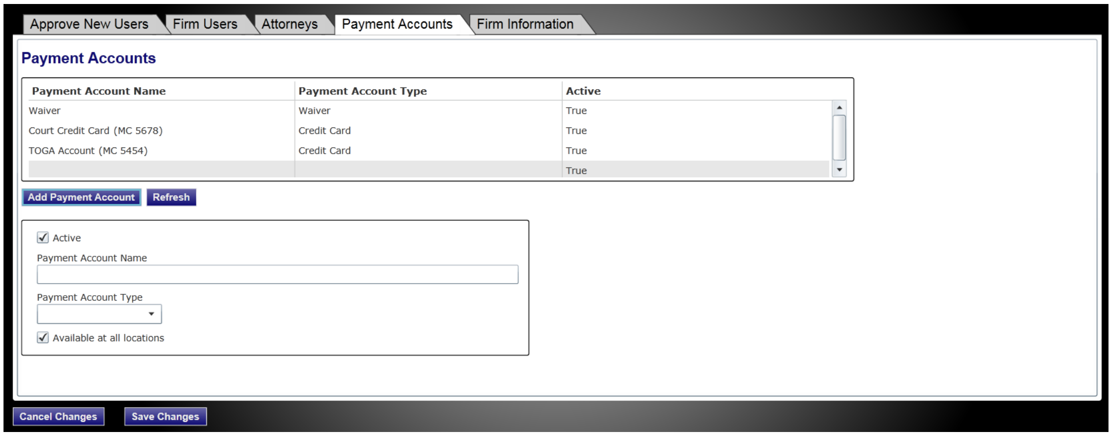
3. Select the firm payment account to deactivate from the list.
4. Clear the ☐ Active check box to deactivate the payment account.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Editing Payment Accounts

Once a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information once it has been entered.

Note: You must be a Firm Administrator to perform this task.

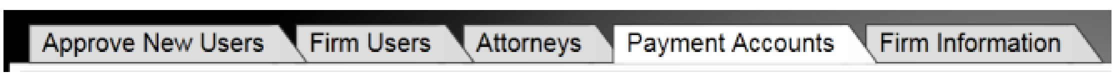
Figure 6.35 – Payment Accounts screen



Perform the following steps to edit firm payment accounts:

1. Select the **FIRM ADMIN** link on the top menu.
2. Select the **Payment Accounts** tab.

Figure 6.36 – Payment Accounts tab selected



3. Select the firm payment account you want to edit from the list.
4. Edit the payment account name or type in the form.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

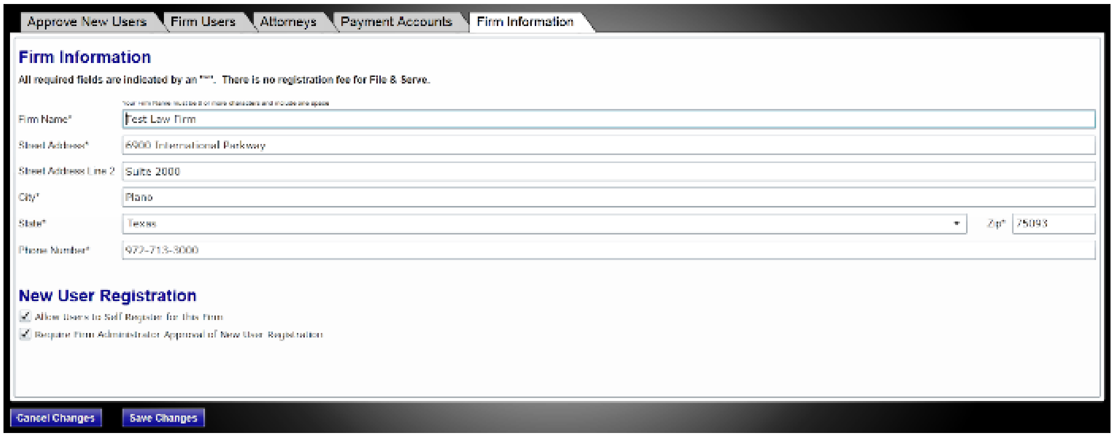
Manage Firm Information

The Firm Administrator uses the Firm Information tab to update the contact information for the firm (name, address, phone number). The Firm Administrator can also use the Firm information tab to manage the registration process by maintaining the authority to register new users or allowing users to self register.

Updating Firm Information

Use the **Firm Information** form to update your firm's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

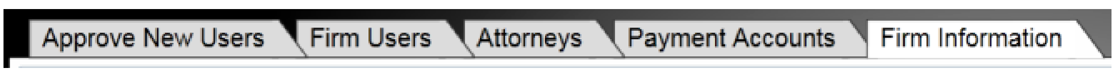
Figure 6.37 – Firm User Information Tab



Perform the following steps to update firm information:

1. Select the **FIRM ADMIN** link on the top menu.
2. Select the **Firm Information** tab.

Figure 6.38 – Firm Information tab selected



3. Update the **Firm Information** form as needed.
4. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

The information entered here updates the firm's information on the **Firm Information** screen and opens the **My Filings** screen.