



Odyssey File & Serve™

Firm Administrator User Guide – Release 3.15

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CHAPTER 1 RELEASE 3.15 NEW FEATURES

The following are new features for Release 3.15.

i Note: Features vary based on your system configuration.

There are no new features for this release.

CHAPTER 2 SYSTEM OVERVIEW

TOPICS COVERED IN THIS CHAPTER

◆ BEFORE YOU BEGIN

This product enables registered users 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.

BEFORE YOU BEGIN

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

i Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

SYSTEM REQUIREMENTS

This section describes the recommended system requirements to successfully use the system.

- **Browser Requirements** – The system supports current versions of the Windows operating system using Internet Explorer 7 or above or 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 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

PAGE NAVIGATION

The following sections describe how to navigate the system and populate data fields throughout the filing process.

Navigate with Breadcrumbs

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

i Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.



Figure 2.1 – Breadcrumb Navigation

Populate the Data Table

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

Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	Jackson Williams	

Figure 2.2 – Data Table


Enter User Information

The user information you enter or select populates the Data Table.

First Name* Amanda	Middle T.	Last Name* Watson
Email* awatson@ops.gov	Administrative Copy ⓘ info@yourfirm.com	Firm Name Madison-Green Law Firm
Country* United States of America		
Address Line 1* 998877 Legal Way		
City* Montgomery		
State* Vermont	Zip Code* 54433	
Phone 876-555-1212		
<input checked="" type="checkbox"/> Make this contact Public		

Figure 2.3 – Data Fields

Resume Filing

At any point in the filing process, the system automatically saves a draft of the page on which you have completed all required fields. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click the [WORKSPACE](#) link at the top of the page, find your case on the *FILINGS* screen, and click the  icon to resume your filing.

The screenshot displays the Odyssey File & Serve web application. At the top, there are navigation tabs: FILINGS, BOOKMARKS, TEMPLATES, and SERVICE CONTACTS. Below these are search filters: My Firm (dropdown), All Statuses (dropdown), All Locations (dropdown), From Date (calendar icon), To Date (calendar icon), Case or Envelope (dropdown), Filter (button), and Export (button). The main content area shows three case entries:

Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)
Envelope # 4645 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Judgment	EFileAndServe	Judg	EFS

Case # 27-ET-CV-12-12 - ()
Envelope # 4643 filed March 21, 2012 at 2:39 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1

Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)
Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO

At the bottom of the table, there are navigation arrows and the text "1 of 5".

Figure 2.4 – Work Space

ERROR MESSAGES

The system displays several error messages to alert users when required information is not entered or invalid information is provided.

Password Reset Errors Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account.

i Note: That user does not exist.

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password.

i Note: Reset your password.

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.

i Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place a cursor on the outline of the field, a required field message is displayed.

The screenshot shows a web form with a navigation bar at the top containing four tabs: '1 Case Information', '2 Parties', '3 Filings', and '4 Summary'. The main heading is 'Enter the Details for the New Case' with a help icon (question mark) to its right. Below the heading, a note states: 'Required fields are bold and have an asterisk (*).'. The form contains several fields:

- 'Select Location*': A dropdown menu.
- 'Select Category*': A dropdown menu with a red 'Required Field' error message to its right.
- 'Select Case Type*': A dropdown menu.
- 'Short Title': A text input field with a help icon (question mark) to its right.
- 'Filing Attorney*': A dropdown menu.
- 'Payment Account*': A dropdown menu.

At the bottom left is an 'Exit' button and at the bottom right is a 'Parties' button.

Figure 2.5 – Required Field Error Message

Receive Error Messages

When an invalid error message is displayed, this means that 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 a cursor on the outline of the field. A required field message is displayed.

The screenshot shows a close-up of a form field labeled 'Zip*'. The field contains the text '654656'. The field is outlined in red, and a red error message 'Invalid Zip Code' is displayed to the right of the field.

Figure 2.6 – Invalid Entry Error Message

CHAPTER 3 E-FILING OVERVIEW

TOPICS COVERED IN THIS CHAPTER

◆ FILING QUEUE STATUS

This section describes the e-filing process.

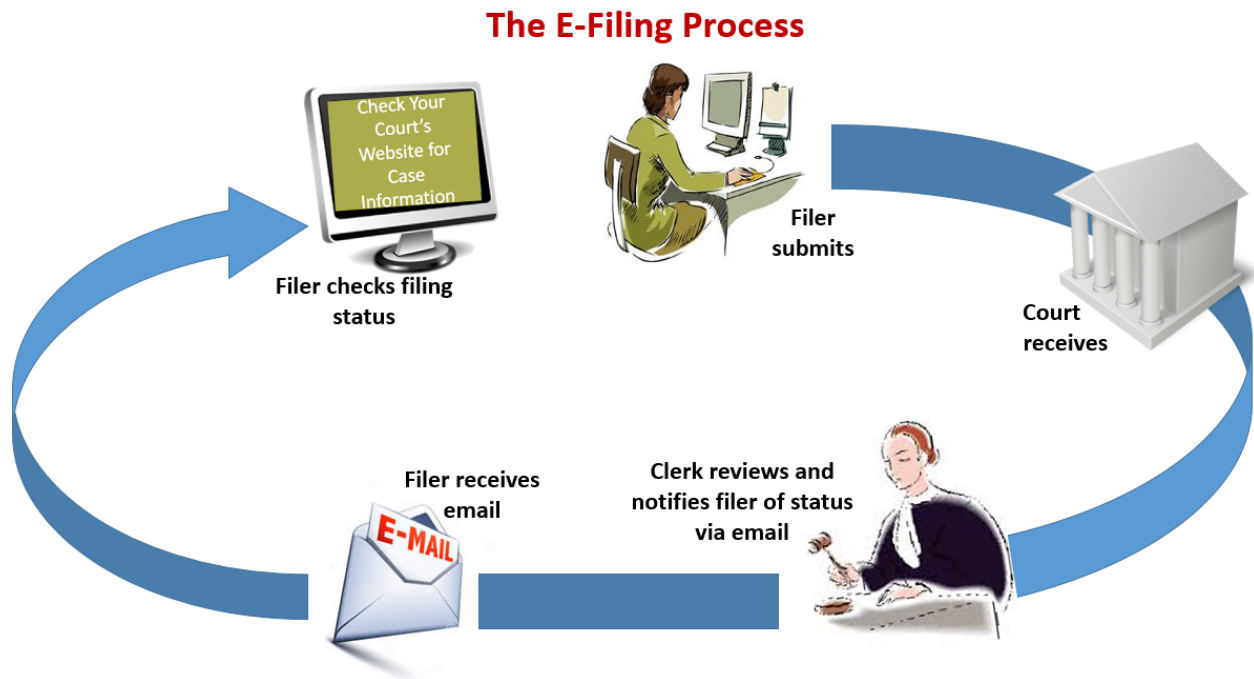


Figure 3.1 – The E-filing Process

Once a user has registered to use File & Serve, a filer can electronically file documents to the court. When the filing is submitted, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects or returns the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An electronic mail is sent to the filer with the case status along with any pertinent information regarding the case. If the option for service was selected during the filing, service is electronically sent to the contacts on the case.

If the filing is returned or rejected, the envelope is sent back to the filer with a reason and the filer is given a time line in which to make the correction and re-submit the filing.

If the filer has questions regarding their filing or case, it is recommended that the filer contact the local court.

FILING QUEUE STATUS

The filing queue status lets you know where you are in the e-filing process. The key represents the status listed for your filing.

The following filing status key table describes the status associated with each filing type.

Status	Filing Type	Definition
Draft	EFO, EFS, SO	Filer entered full or partial filing data, but has not yet submitted filing.
Submitting	EFO, EFS, SO	Filer has submitted filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	Document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process. Note: The system now prevents users from changing an envelope that has already been submitted.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected filing from a queue. Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.
Accepted	EFO, EFS	Reviewer has reviewed filing and accepted.
Rejected	EFO, EFS	Reviewer has reviewed filing and rejected.
Returned	EFO, EFS	Reviewer has reviewed filing and returned the filing as additional action needs to be taken by the filer. Note: Filer can cancel or copy a filing in Returned status.
Served	SO	Service only filings completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed, the service was incomplete. Example: Email or domain rejected. Note: The system will show the Resend Service button for failed electronic service.

Status	Filing Type	Definition
Cancelled	EFO, EFS, SO	Filer has cancelled the filing. Filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	File format or billing error has occurred upon filer submitted filing. Failure specifics are available on the Details screen, and the filer is notified of specifics through email.

CHAPTER 4 FILE & SERVE HOME PAGE

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

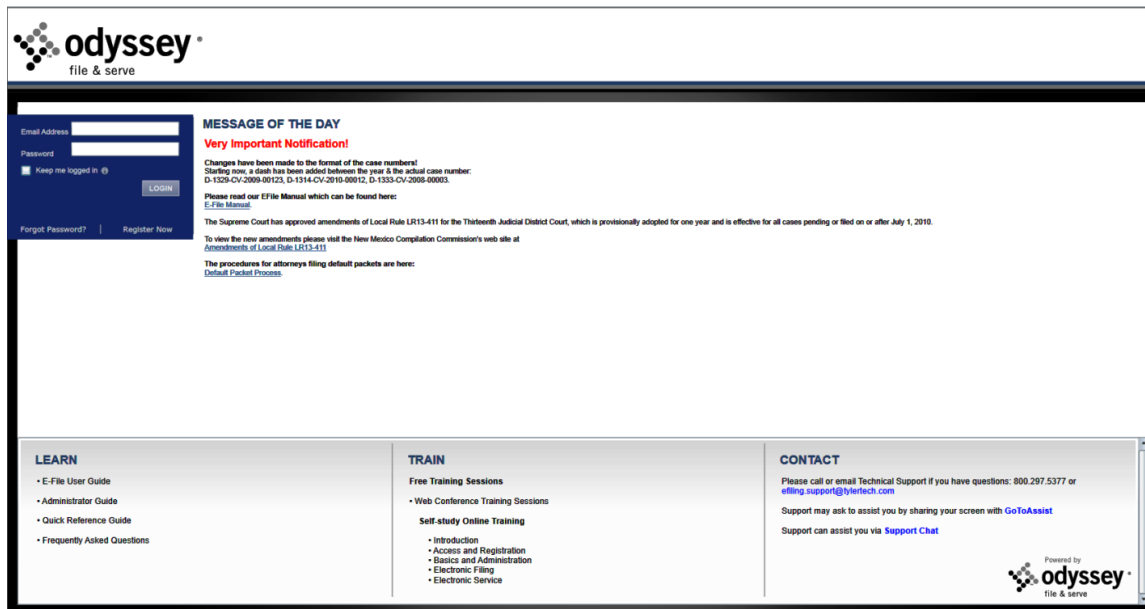


Figure 4.1 – File & Serve Home Page

Message of the Day

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

Login

The **Login** area allows the user to log in and use the system. Users can log in to by entering their e-mail address and password.

Register Now

The *Register Now* link allows a user to register in the system using their name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The *Forgot Password* link allows a user to request their password information be re-sent to them in cases where they have forgotten their password.

Keep Me Logged In

The *Keep me logged in* checkbox allows a user to remain logged into the system for future access.

Learn

The **Learn** section has links to the user documentation. The following types of documents are available to help you answer many of your day-to-day operation questions:

- The **User Guide** provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm, managing users, payments, attorney accounts, as well as, creating and editing the firm's contact lists.
- The **Quick Reference Guide (QRG)** provides only the steps needed to complete common tasks such as logging into 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 functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- 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 800–297–5377 Monday through Friday between the hours of 7 a.m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to efiling.support@tylertech.com or by using the [File & Serve Chat](#) option.

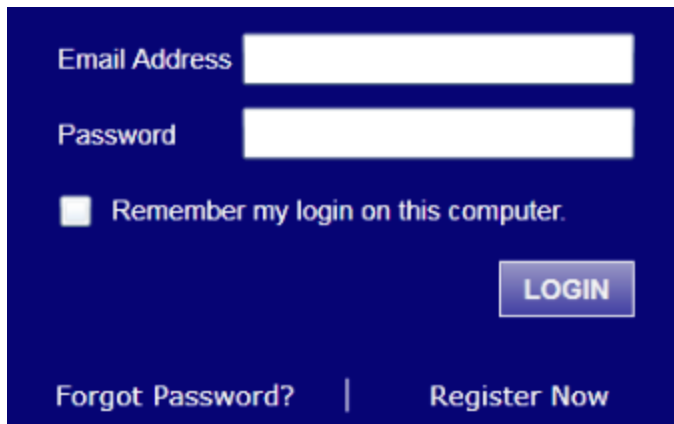
CHAPTER 5 FILE & SERVE REGISTRATION

TOPICS COVERED IN THIS CHAPTER

- ◆ REGISTERING AS A NEW FIRM
- ◆ REGISTERING AS A USER WITH AN EXISTING FIRM
- ◆ REGISTERING AS AN INDEPENDENT USER
- ◆ RESETTING YOUR PASSWORD

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 attorney accounts.



The screenshot shows a login form with the following elements:

- Input field for "Email Address"
- Input field for "Password"
- Checkbox labeled "Remember my login on this computer."
- A blue "LOGIN" button
- Links for "Forgot Password?" and "Register Now" at the bottom.

Figure 5.1 – File & Serve Login Area

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 the **Firm Administrator** option.

File and Serve Registration Wizard **Step 1 of 5**

I want to Register as a

Firm Administrator
Each firm must have a designated person to administer the E-Filing system. The Administrator will register the firm and be responsible for setting up and maintaining all users, credit card accounts, and attorneys at the firm.

User with an Existing Firm
Your firm has already been registered with the E-Filing system. You must know your firm ID and have been given permission to set up your account by your Firm Administrator. The Firm ID serves as the common identifier for all users within your firm.

An Independent User
You are a single user, not associated with or represented by a law firm.

All required fields are indicated by an ****. There is no registration fee for File & Serve.

Figure 5.2 – 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 5.3 – 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.

You must agree to the Terms & Conditions before continuing with the registration process.

I Agree

Figure 5.4 – 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: An asterisk (*) indicates a required field.

File and Serve Registration Wizard **Step 3 of 5**

Firm Information

Name*

Street Address*

Street Address Line 2

City*

State* Zip*

Phone Number*

New User Registration

Allow Users to Self Register

Require Administrator Approval of New User Registration

Figure 5.5 – 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 button to continue; click the button to return to the previous screen; or click the button to cancel the registration process.
11. Complete the **User Information** form.

File and Serve Registration Wizard **Step 4 of 5**

User Information

All required fields are indicated by an "*". There is no registration fee for File & Serve.

First Name* MI

Last Name*

Email Address*

Verify Email Address*

Password*
Your password is case sensitive and must be at least six characters.

Verify Password*

I am also an Attorney

Compose a simple question and answer pair which will allow you to restore your password, should you forget it. Please choose a simple, specific question that can only be answered by you. Example: High School Mascot or The Name of My First Pet.

Security Question*

Security Answer*

Figure 5.6 – 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.

Security Question*

Figure 5.7 – Security Question Field

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

Security Answer*

Figure 5.8 – Security Answer Field

14. Click the button.

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

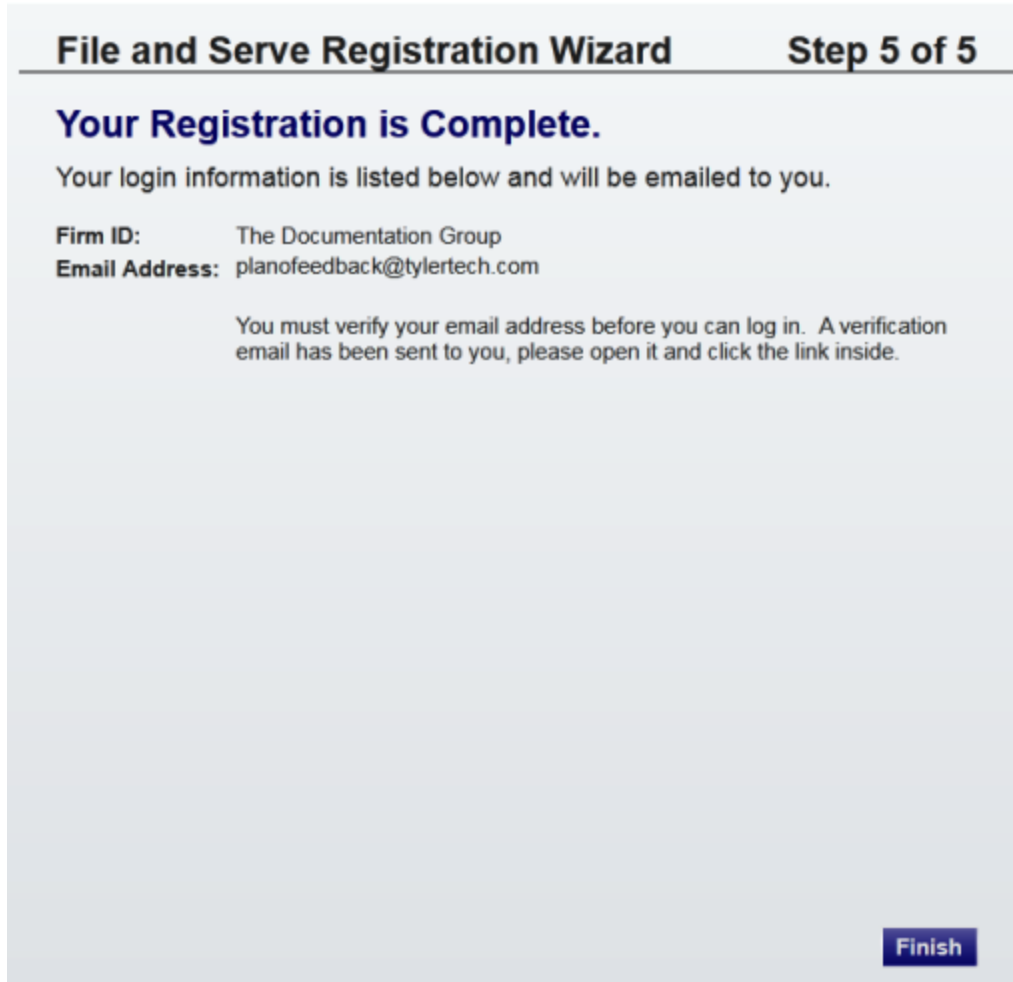


Figure 5.9 – File and Serve Registration Wizard (Step 5 of 5)

15. Click the **Finish** button to continue.

i 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.

REGISTERING AS A USER WITH AN EXISTING FIRM

You can register as a user if your Firm Administrator has already registered with the system and approved users to self-register.

i Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.

Figure 5.10 – Login Window

Perform the following steps to register as a user in the firm:

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

The **Registration Wizard** opens.

Note: There is no fee to sign up for the product.

Note: Registration options vary by site.

2. Select the **User with an Existing Firm** option.
3. Click the **Next** button to select your firm, or click the **Cancel** button to cancel the registration process.
4. Type your **Firm Name**, or click the **Search** button to view a list of all available firms.
5. Select your firm's name from the list.
6. Click the **Next** button to enter your account information; click the **Previous** button to return to the previous screen; or click the **Cancel** button to cancel the registration process.

Note: An asterisk (*) indicates required information.

7. Complete the **User Information** form.
8. Enter a simple **Security Question** in the field provided. (Example: What was your high school mascot?)

Figure 5.11 – Security Question Field

9. Enter a **Security Answer** in the field provided.

Figure 5.12 – Security Answer Field

Note: Select **I am also an Attorney** if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.

Attorney Number*

Figure 5.13 – Attorney Number Field

Note: Click the **Verify** button if prompted. This verifies your attorney number is in the system.

10. Click the **Register** button. The system displays the **Your Registration is Complete** message on the screen.
11. Record the login details displayed for your records.
12. Click the **Finish** button.
13. Go to your e-mail inbox to access your registration confirmation e-mail.

Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you. Open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

Your registration is now complete. Once you have received your e-mail confirmation, return to the login screen to log in.

REGISTERING AS AN INDEPENDENT USER

You can register as an “independent user” if you are a single user of the system, meaning a user not associated with any firm or being represented by any firm.

Note: Refer to your local court’s website before registering as an independent user, as registration options may vary.

Perform the following steps to register as an independent user:

1. Click the **Register Now** link.
 - Note:** There is no fee to sign up for e-filing.
2. Select the **An Independent User** option.
3. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
4. Read the **Usage Agreement** before proceeding.
5. Select the **I Agree** check box to accept and agree to the terms listed on your screen.
6. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
7. Complete the **Contact Information** form.
8. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
9. Complete the **User Information** form.
10. Enter a question in the **Security Question** field.

Note: Your security question is required to restore your password in case you forget your password.

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

12. Click the **Register** button.

The message **Your Registration is Complete** displays on the screen.

13. Click the **Finish** button.

Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you; open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

Your registration is complete, go to your home page to log in.

RESETTING YOUR PASSWORD

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the **Forgot Password?** link.

Note: Your password is case-sensitive. Make sure your caps lock is not on.

Note: You can unlock your account by using the **Forgot Password?** option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

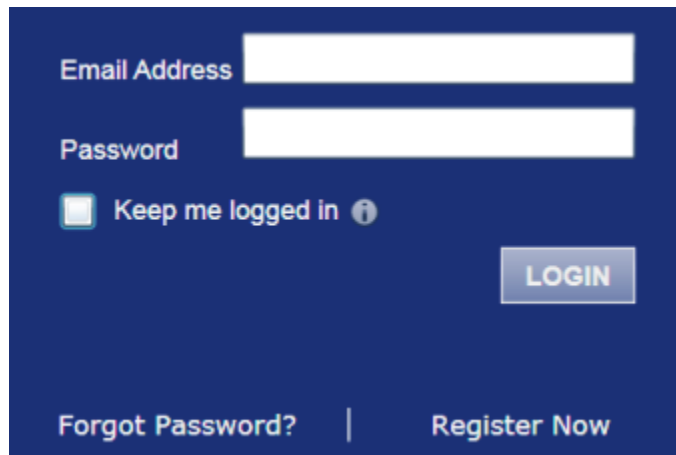


Figure 5.14 – Login Window

1. Click the **Forgot Password?** link on the **Login** window.

The **Reset Password** window opens.



Figure 5.15 – Reset Password – E-mail Address

2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.

Note: An error message stating that no user is registered with the email address is displayed if the system is unable to find your email address.

3. Click the **Next** button to continue.
4. Type your answer in the **Security Answer** field.
5. Click the **Ok** button, or click the **Cancel** button to cancel the reset password process.

The system displays this message: **A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.**

6. Go to your email inbox.
7. Locate the email from no-reply@tylerhost.net.
8. Click the link labeled **Click here** to reset your password.

You will be prompted to choose a new password.

9. Enter a new password in the *New Password* field.
10. Re-enter your new password in the *Repeat New Password* field.
11. Click the *Change Password* button.

A confirmation screen displays: **Your password has been changed successfully.**

CHAPTER 6 LOGIN AND LOGOUT

TOPICS COVERED IN THIS CHAPTER

- ◆ LOGGING IN
- ◆ LOGGING OUT

All users are required to log in 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 after they have completed their transactions.

LOGGING IN

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 e-file or e-serve.

Note: Click **Register Now** to register if you have not registered before.

Perform the following steps to log in:

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

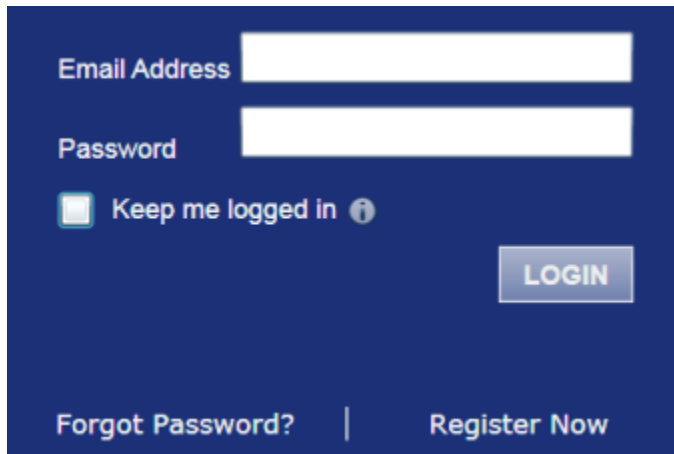
The image shows a login form on a dark blue background. It features two white input fields: 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in' with an information icon to its right. A light blue 'LOGIN' button is positioned to the right of the checkbox. At the bottom of the form, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

Figure 6.1 – Login Area

3. Select the **Keep me logged in** check box to stay logged in. This keeps you logged in until you click the logout link to logout.
4. Click the **LOGIN** button.

Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the **Forgot Password?** option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

Once you have successfully logged in, you can begin to e-file and e-serve.

LOGGING OUT

This section describes how to properly log out.

Perform the following steps to log out:

1. Click the **LOGOUT** link at the top right corner of the page to automatically log out.

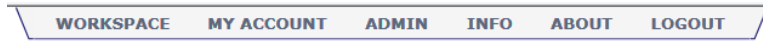


Figure 6.2 – Logout Link

2. Return to the home page to log in to the system.

CHAPTER 7 CASE SEARCH

TOPICS COVERED IN THIS CHAPTER

- ◆ SEARCHING FOR A CASE
- ◆ ADVANCED SEARCH

Search for a case by selecting a location, entering a case number or a party name.

SEARCHING FOR A CASE

You can search for by selecting a location and then entering the case number or the party name in the search field.



Figure 7.1 – Case Search Option

Perform the following steps to search for a case:

1. Click the drop-down arrow to select a location.
2. Type the exact case number assigned by the court, or type the party's name in the search field.

No wildcards can be used in the search field.

3. Click the **Go** button.

The result screen displays the case meeting the criteria entered in the search field.

The image shows a search results window. At the top, it says 'Searching for: 11-000131-CK' and 'As: Case Number'. Below this is a table with three columns: 'Case Number', 'Description', and 'Actions'. There is one row of data with the case number '11-000131-CK' and the description 'Brown, Jane v Black, Jane'. The 'Actions' column contains three icons: a document, a magnifying glass, and a person. A 'Close' button is located at the bottom right of the window.

Case Number	Description	Actions
11-000131-CK	Brown, Jane v Black, Jane	  

Figure 7.2 – Case Search Results

4. Select an icon under the **Actions** column and perform actions as necessary, or click the **Close** button if you choose not to perform any further actions.

ADVANCED SEARCH

The **Advanced Search** feature provides the ability to search by party name using a person's name or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

PERFORMING AN ADVANCED SEARCH BY PERSON

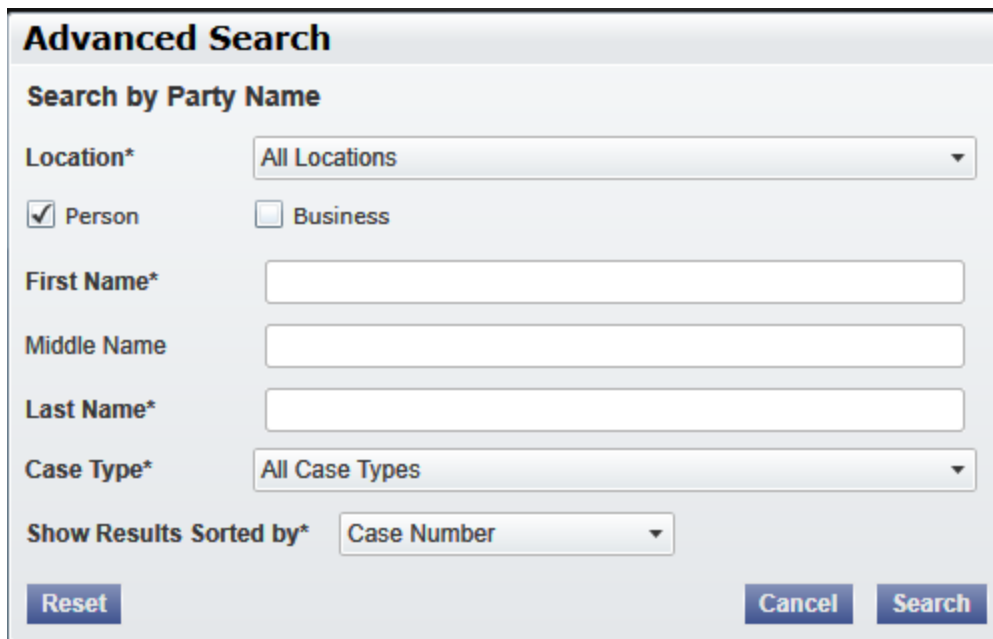
Search for a case by selecting a location, entering a case number or a party name. The **Advanced Search** feature provides the ability to search by party name using a person's name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

The *Advanced Search* dialog box opens.



Advanced Search

Search by Party Name

Location* All Locations

Person Business

First Name*

Middle Name

Last Name*

Case Type* All Case Types

Show Results Sorted by* Case Number

Reset Cancel Search

Figure 7.3 – Advanced Search Dialog Box

2. Select the **Person** check box.

Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

PERFORMING AN ADVANCED SEARCH BY BUSINESS

The Advanced Search feature provides the ability to search by party name using a business name.

An asterisk (*) indicates a required field. **Note:** Color themes may vary by site.

Complete the following steps to perform an *Advanced Search* using the **Business** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

The *Advanced Search* dialog box opens.

Figure 7.4 – Advanced Search Dialog Box

2. Select the **Business** check box.

Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue, or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

CHAPTER 8 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, and payments along with updating firm information.

MANAGE NEW USERS

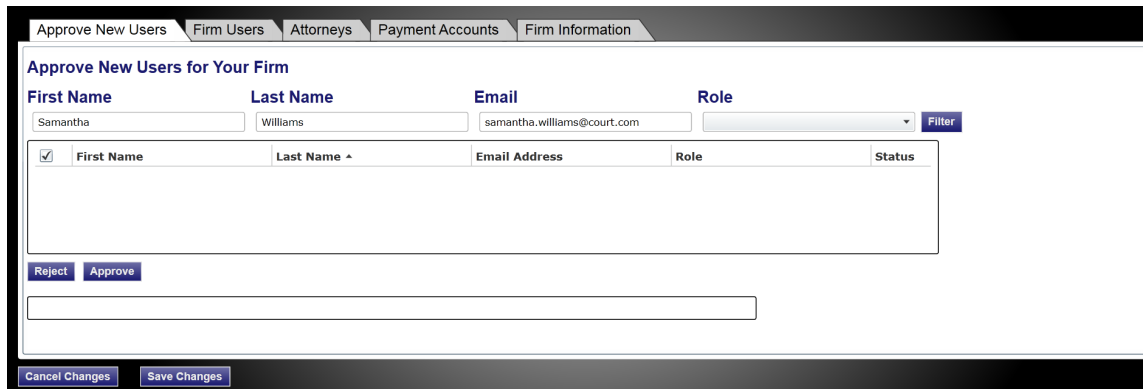
When a new user registers, the administrator receives notification to either approve or reject the request for an account if the **Require Administrator Approval of New User Registration** option is selected on the **Firm Information** screen.

FILTER NEW USERS OPTIONS

The Firm Administrator can filter users by name, email address, and role assigned.

You must be a Firm Administrator to perform this task.

i Note: Features vary based on your system configuration.



The screenshot shows a web application interface for managing users. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The main heading is 'Approve New Users for Your Firm'. Below this, there are four input fields: 'First Name' (containing 'Samantha'), 'Last Name' (containing 'Williams'), 'Email' (containing 'samantha.williams@court.com'), and 'Role' (a dropdown menu). A 'Filter' button is located to the right of the 'Role' field. Below the input fields is a table with a checked checkbox in the first column and headers: 'First Name', 'Last Name', 'Email Address', 'Role', and 'Status'. The table body is currently empty. At the bottom of the table area, there are 'Reject' and 'Approve' buttons. At the very bottom of the interface, there are 'Cancel Changes' and 'Save Changes' buttons.

Figure 8.1 – Filter New Users Options

1. Type the user name or email address, or select a role using the drop-down list.
2. Click **Filter**.

The firm users meeting your criteria are displayed.

APPROVING AND REJECTING NEW USERS

The Firm Administrator approves or rejects new users for the firm.

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

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

Figure 8.2 – Approve New User Tab

3. Select the user from the list to approve or reject.
4. Verify the user information is correct.

Note: If the user information is incorrect, select the next to the user's name and correct the information in the contact window below the **Reject** and **Approve** buttons.

5. Click the **Approve** button to approve the new user, or click the **Reject** button to reject the new user.
6. 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. The Firm Administrator may also add user accounts and reset passwords, as well as activate and deactivate user accounts for firm users.

FILTER FIRM USERS OPTIONS

The Firm Administrator can filter users by name, email address, and role assigned.

You must be a Firm Administrator to perform this task.

Note: Features vary based on your system configuration.

Figure 8.3 – Filter Firm Users Options

1. Type the user name or email address, or select a role using the drop-down list.

2. Click **Filter**.

The firm users meeting your criteria are displayed.

ADDING FIRM USER ACCOUNTS

The Firm Administrator is responsible for adding firm user accounts.

i Note: An asterisk (*) indicates a required field.

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

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screen opens.

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

Manage Users for Your Firm

First Name	Last Name ^	Email Address	Role	Status
			Filer	New
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified
Site	Admin	test.siteadmin@tylertech.com	Filer	Active
Test	Basic	test.basic@tylertech.com	Filer	Active

Add Firm User

First Name* Middle Last Name*

 Email Address*

Roles

Firm Admin Filer
 Attorney

Attorney Number*

Figure 8.4 – Firm Users Screen

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

Roles

- Firm Admin Filer
 Attorney

Figure 8.5 – Firm User Roles

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

Note: Firm Administrators are responsible for managing users, attorneys, payments and updating firm information.

- b. Select **Filer** to assign the Filer role to the new firm user.
6. Select **Attorney** to allow other users to select the option to save a firm user as an attorney when filing.

Figure 8.6 – Attorney Number Field

- a. Type the attorney number in the **Attorney Number** field.
- b. Click the **Verify** button.

The system verifies the attorney number and displays the results.

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

The new user information is displayed at the top of the screen.

EDITING FIRM USER ACCOUNTS

The Firm Administrator is responsible for editing firm user accounts.

Perform the following steps to edit firm user account information:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

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

Approve New Users Firm Users Attorneys Payment Accounts Firm Information

Manage Users for Your Firm

First Name	Last Name ^	Email Address	Role	Status	
			Filer	New	
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	
Site	Admin	test.siteadmin@tylertech.com	Filer	Active	
Test	Basic	test.basic@tylertech.com	Filer	Active	

Add Firm User

First Name* Middle Last Name*

Email Address*

Roles

Firm Admin Filer

Attorney

Attorney Number* **Verify**

Cancel Changes **Save Changes**

Figure 8.7 – Firm Users Screen

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

The Firm Administrator is responsible deleting firm user accounts.

Perform the following steps to delete a firm user account:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

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

First Name	Last Name ^	Email Address	Role	Status	
			Filer	New	
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	
Site	Admin	test.siteadmin@tylertech.com	Filer	Active	
Test	Basic	test.basic@tylertech.com	Filer	Active	

Add Firm User

First Name* Middle Last Name*

Email Address*

Roles

Firm Admin Filer

Attorney

Attorney Number* **Verify**

Cancel Changes **Save Changes**

Figure 8.8 – Firm Users Screen

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.

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.”

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

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

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

The screenshot shows a web application interface with a navigation menu at the top containing 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. Below the menu is a table listing users:

First Name	Last Name	Email Address	Role	Status
Janice	Doe	jdoe@courts.com	Filer, Firm Admin	Active

Below the table is an 'Add Firm User' button. Underneath is a form for adding a new user with the following fields:

- First Name*: Janice
- Middle: (empty)
- Last Name*: Doe
- Email Address*: jdoe@courts.com
- Roles:
 - Firm Admin
 - Filer
 - Save Firm User As Attorney
- Attorney Number*: 321123

At the bottom of the form is a 'Resend Activation' link. At the very bottom of the interface are 'Cancel Changes' and 'Save Changes' buttons.

Figure 8.9 – Resend Activation Link

3. 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.

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

i 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.”

Complete the following steps to manually reset the user password:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

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

The screenshot shows a web application interface for managing users. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. Below these is a section titled 'Manage Users for Your Firm' containing a table with the following data:

First Name	Last Name	Email Address	Role	Status
Janey	Dominican	janeydominican@test.com	Filer, Firm Admin, Court Admin, Review	Active

Below the table is an 'Add Firm User' form. It includes fields for 'First Name*' (Janey), 'Middle', and 'Last Name*' (Dominican). The 'Email Address*' field contains 'janeydominican@test.com'. Under the 'Roles' section, there are checkboxes for 'Firm Admin' (checked), 'Filer' (checked), and 'Attorney' (unchecked). A 'Reset Password' link is located at the bottom right of the form. At the bottom of the interface are 'Cancel Changes' and 'Save Changes' buttons.

Figure 8.10 – Reset Password Link

- Click the [Reset Password](#) link.

The **Enter New Password** window opens.

The screenshot shows a dialog box titled 'Enter New Password'. It contains the following text: 'The password is case sensitive, must be 6-10 characters, and should not contain spaces or special characters.' Below this text are two input fields: 'New Password*' and 'Re-enter New Password*'. At the bottom of the dialog are 'Continue' and 'Cancel' buttons.

Figure 8.11 – Enter New Password Window

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

Note: Passwords are case sensitive. A password must be six to 10 characters long and should not contain any spaces or special characters.

- Re-enter the new password in the **Re-enter New Password** field.
- Click the **Continue** button to continue, or click the **Cancel** button to cancel the new password process.

UNLOCKING USER ACCOUNTS

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, he or she must send the new password to the user. This feature is only available when the account status is "Locked."

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

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

The screenshot shows a web application interface with a navigation menu at the top containing 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. Below the menu is a table with the following data:

First Name	Last Name	Email Address	Role	Status
Janice	Doe	jdoe@courts.com	Filer, Firm Admin	Active

Below the table is an 'Add Firm User' form with the following fields and options:

- First Name***: Janice
- Middle**: (empty)
- Last Name***: Doe
- Email Address***: jdoe@courts.com
- Roles**:
 - Firm Admin
 - Filer
 - Save Firm User As Attorney
- Attorney Number***: 321123

An [Unlock Account](#) link is located at the bottom right of the form. At the bottom of the interface are 'Cancel Changes' and 'Save Changes' buttons.

Figure 8.12 – Unlock Account link

3. Click the [Unlock Account](#) link.

The **Enter New Password** window opens.

The screenshot shows a dialog box titled 'Enter New Password'. It contains the following text and fields:

The password is case sensitive, must be 6-10 characters, and should not contain spaces or special characters.

New Password*

Re-enter New Password*

At the bottom are 'Continue' and 'Cancel' buttons.

Figure 8.13 – Enter New Password Window

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

Note: Passwords are case sensitive. A password must be six to 10 characters long and should not contain any spaces or special characters.

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

6. Click the **Continue** button to continue, or click the **Cancel** button to cancel the new password process.

Note: The Firm Administrator must manually send an e-mail or contact the user with the new password. 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 or the attorney list.

Perform the following steps to add an attorney to the attorney list:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screen opens.

2. Select the **Attorneys** tab.

The screenshot displays the 'Manage Attorneys for Your Firm' interface. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The 'Attorneys' tab is selected. Below the tabs is a table with the following data:

First Name	Last Name ^	Attorney Number
Joshua	Okanawa	978546

Below the table is an 'Add Attorney' section with the following form fields:

- First Name***: Joshua
- Middle**: (empty)
- Last Name***: Okanawa
- Attorney Number***: 978546 (with a **Verify** button)
- Save Attorney as Firm User
- Roles**:
 - Firm Admin
 - Filer
- Email Address***: jokanawa@bradfordlaw.com

At the bottom of the form are two buttons: **Cancel Changes** and **Save Changes**.

Figure 8.14 – Attorneys Screen

3. Click the **Add Attorney** button.
4. Complete the **Add Attorney** form.
5. Type the attorney's number in the **Attorney Number** field.
6. Click the **Verify** button.

The system verifies the attorney number.

- 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.

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

- Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

- Select the **Attorneys** tab.

The screenshot displays the 'Manage Attorneys for Your Firm' interface. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The main heading is 'Manage Attorneys for Your Firm'. Below this is a table with columns for 'First Name', 'Last Name ^', and 'Attorney Number'. The table contains one entry: Joshua Okanawa with Attorney Number 978546. Below the table is an 'Add Attorney' button. The form below contains the following fields and options:

- First Name***: Joshua
- Middle**: (empty)
- Last Name***: Okanawa
- Attorney Number***: 978546 (with a 'Verify' button)
- Save Attorney as Firm User
- Roles**:
 - Firm Admin
 - Filer
- Email Address***: jokanawa@bradfordlaw.com

At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 8.15 – Attorneys Screen

- Select the firm user you want to edit from the list.
- Edit the information in the form.
- 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.




Perform the following steps to delete an attorney account:

- Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

- Select the **Attorneys** tab.

Figure 8.16 – Attorneys Screen

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  button to save the changes and continue, or click the  button to cancel any changes made.

MANAGE PAYMENT ACCOUNTS

The Firm Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Firms can have multiple payment accounts if needed. Credit cards and waivers are valid forms of payments for filing fees.

ADDING PAYMENT ACCOUNTS

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

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

1. Click the **FIRM ADMIN** link on the top menu on the home page.
The Firm Administrator function screen opens.
2. Select the **Payment Accounts** tab.

Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

Approve New Users Firm Users Attorneys Payment Accounts Firm Information

Payment Accounts

Payment Account Name	Payment Account Type	Active
Test Amex (AMEX 0005)	Credit Card	Yes
Test Waiver	Waiver	Yes
Credit Card	Credit Card	No
Plano County	Draw Down	No

Add Payment Account Refresh

Payment Account Name*

Payment Account Type*

Available at all locations

Cancel Changes Save Changes

Figure 8.17 – Payment Accounts Screen

3. Click the **Add Payment Account** button.
4. Type a payment account name.
5. Select a payment account type (cash, credit card, draw down, or waiver) from the drop-down list.

Payment Account Type*

Cash
 Credit Card
 Draw Down
 Waiver

Figure 8.18 – Payment Account Type Drop-Down List

- a. Select **Cash** if the payment account is cash.

Payment Account Name*

Payment Account Type*

Active

Available at all locations

Figure 8.19 – Add Payment Accounts

- b. Select **Credit Card** if the payment account is a credit card.
- c. Click the **Enter Credit Card Information** button to enter the credit card information.

Note: The system may re-direct you to a secure payment processing site to enter the credit card information. You may need to turn off your browser's pop-up blocker to be able to add the credit card information.

- d. Select **Draw Down** if the payment account is a draw-down account.
- e. Click the **Enter Draw Down Information** button to select a draw-down account.

The **Draw Down** selection window opens.

Figure 8.20 – Draw Down Selection Window

- f. Select a draw-down account from the drop-down list.
- g. Select **Waiver** if the payment account is a waiver.

Note: The **Active** check box appears when the **Waiver** payment account type is selected.

- h. Select the **Active** check box to activate the payment account.
 - i. Select the **Available at all locations** check box to make the selected payment type available at all locations associated with the payment account.
6. Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

The system displays the payment account information at the top of the screen.

DEACTIVATING PAYMENT ACCOUNTS

The Firm Administrator is responsible for deactivating payments accounts.

Perform the following steps to deactivate firm payment accounts:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

2. Select the **Payment Account** tab.

Payment Account Name	Payment Account Type	Active
Waiver	Waiver	True
Court Credit Card (MC 5678)	Credit Card	True
TOGA Account (MC 5454)	Credit Card	True

Active
 Payment Account Name:
 Payment Account Type:
 Available at all locations

Figure 8.21 – Payment Accounts Screen

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 button to save the changes and continue, or click the 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. Instead, deactivate the payment account, and add a new one.

Perform the following steps to edit firm payment accounts:

1. Click the **FIRM ADMIN** link on the top menu on the home page.
The Firm Administrator function screens opens.
2. Select the **Payment Accounts** tab.

Payment Account Name	Payment Account Type	Active
Waiver	Waiver	True
Court Credit Card (MC 5678)	Credit Card	True
TOGA Account (MC 5454)	Credit Card	True

Active
 Payment Account Name:
 Payment Account Type:
 Available at all locations

Figure 8.22 – Payment Accounts Screen

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.

Perform the following steps to update firm information:

1. Click the **FIRM ADMIN** link on the top menu on the home page.

The Firm Administrator function screens opens.

2. Select the **Firm Information** tab.

Approve New Users Firm Users Attorneys Payment Accounts Firm Information

Firm Information

Name* Law Firm of America

Country* United States of America

Address Line 1* 6500 Industrial Pkwy

City* Huntsville

State* Texas Zip Code* 73024

Phone Number* 972-999-2343

New User Registration

Allow Users to Self Register

Require Administrator Approval of New User Registration

Cancel Changes Save Changes

Figure 8.23 – Firm User Information Screen

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 **Filings** screen.

Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Telephone	800.297.5377
Odyssey File & Serve E-mail	efiling.support@tylertech.com
Odyssey File & Serve Support Hours	7 a.m. to 9 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through Support Chat .
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist .