FileTime Administrative Reports Guide

FileTime provides your with a powerful suite of report options to help you manage your firm's eFiling and eService activities.

You'll find that the eFiling reports provide you the information you need to assist you in efficiently billing for your firm's eFiling and eService submissions.

The eServices and Alerts Reports enable you to stay on top of issues that could adversely impact the outcome of your cases.

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Revised 8/7/2015

FileTime Reports Guide

The FileTime Reports feature provides your firm powerful tools for generating reports on virtually any aspect of your firm's eFiling and/or eService activities and Alerts. This can be for billing purposes, for case reviews, etc. Only firm eFiling administrators have access to the Reports features.

We provide your firm three major categories of report types:

- **eFilings** - These reports provide different ways to view filings, submission, and billing details for your firms activities.
- **eServices** - These reports provide you the ability to view eServices inbound to your firm by other case counsel and outbound services by your firm to other firm counsel.
- **Alerts** - These reports enable you to view firm-wide failed filings, returned for correction filings, failed eServices by your firm to other case counsel, and failed fax services.

1. Accessing the Reports Feature

Login at www.filetime.com and click the **Admin** button. If you do not see the Admin button you need to have your firm eFiling administrator assign the Admin role to you so you have access to this feature.

Click the **Reports** button on the sub-navigation bar.

The reports drop-down menu opens. Select the report type you want to generate.

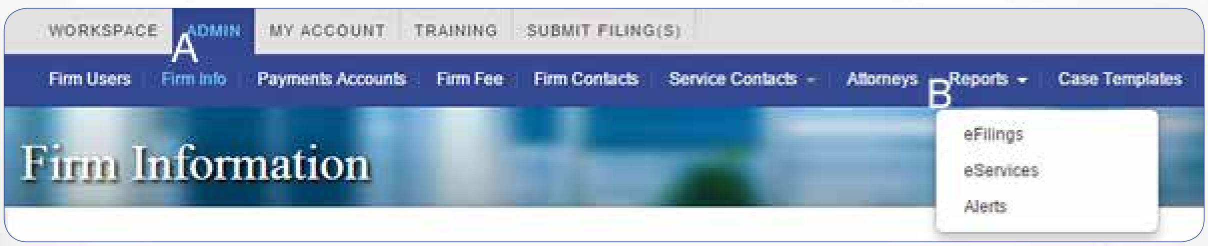


Figure 1, Accessing The Reports Section

2. eFiling Reports

When you click eFilings on the Reports drop-down menu (Figure 1, B) you are taken to the **eFiling Reports** page (Figure 2).

We suggest that you take the time to review and generate all the report types after your firm has some eFiling submissions through FileTime. We found that firms have different requirements and one of our report types generally best meets their needs.

You won't really know which of the following reports best meets your needs until you run them and become familiar with them.

Figure 2, FileTime Report Options

A. Quick Overview Report

The overview report provides you a quick overview of eFiling and/or eService activities matching your selection criteria.

Figure 3 shows you the Generator page and Figure 4 shows a sample report.

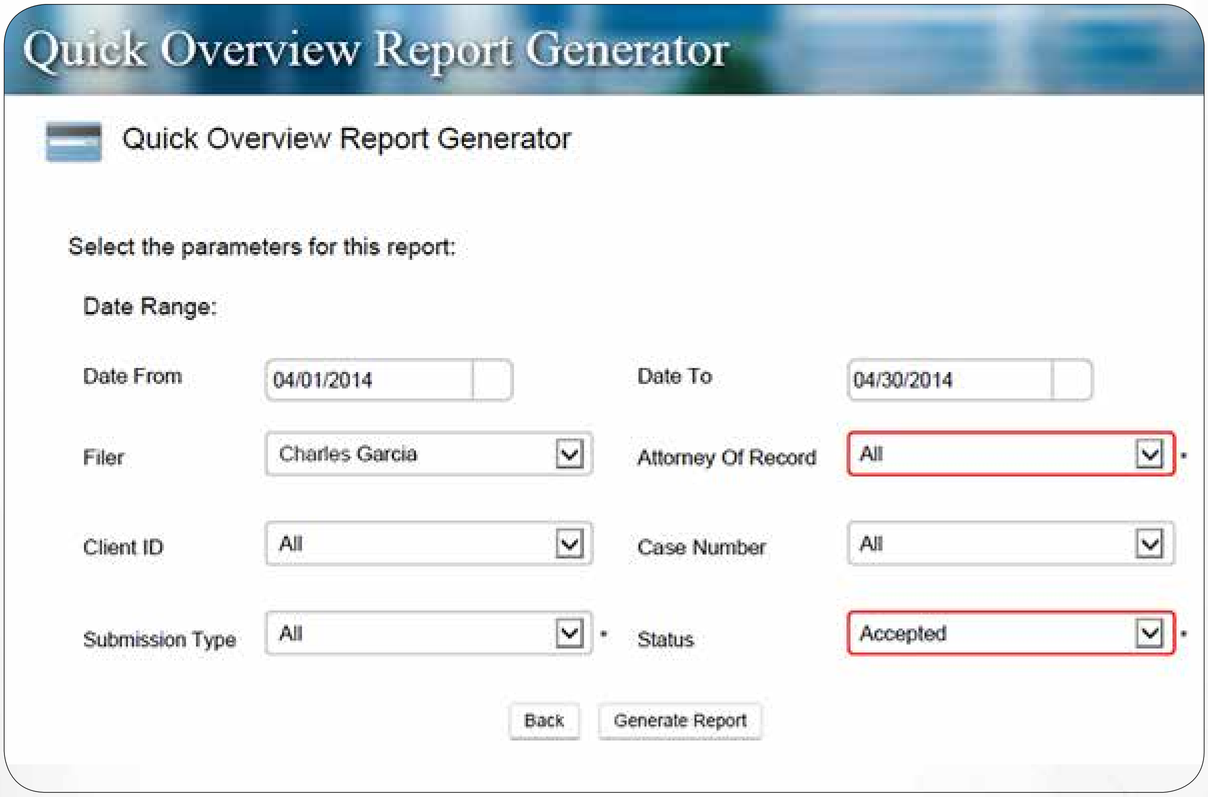


Figure 3, The Quick Overview Report Generator

If you require only the total fees for a submission, for instance, you may find that this concise report provides all the information you need for billing purposes.

You can export the report in PDF or Microsoft Excel format.

Quick Overview Report

Report Parameters:

Export to PDF | Export to Excel

Date Range:	03/01/2015 - 06/18/2015
Filer:	All
Attorney:	All
Client ID:	All
Cause Number:	All
Submission Type:	All
Status:	Accepted

Client ID: **FT-20150611** Case Style: **Amy L Greene3 V Great StatE iNSURANCE**

Submission ID 116417 submitted by behalf of Wilma Adair

Date	Status	Filing	Type	Description
06-11-15	accepted	Petition	Both	Petition

Total	**$303.77**

Client ID: **FT-150526** Case Style:

Submission ID 114365 submitted by behalf of Thomas Schoolcraft

Date	Status	Filing	Type	Description
05-26-15	accepted	Petition	Both	Petition

Total	**$328.47**

Client ID: **FT-15-11-9** Case Style: **Tyra Banks v Joseph Brown**

Submission ID 113937 submitted by behalf of Thomas Schoolcraft

Date	Status	Filing	Type	Description
05-19-15	accepted	No Fee Documents	Both	No Fee Documents

Total	$3.33

Figure 4, Sample Quick Overview Report

B. Design Your Report

The **Design-Your-Report Generator** enables you to create a report that exactly matches your needs.

The data types that you check in the **Select Table Columns** section below (Figure 5, A) establishes the column headers in your report. The more data types you select the more columns you will see on your report.

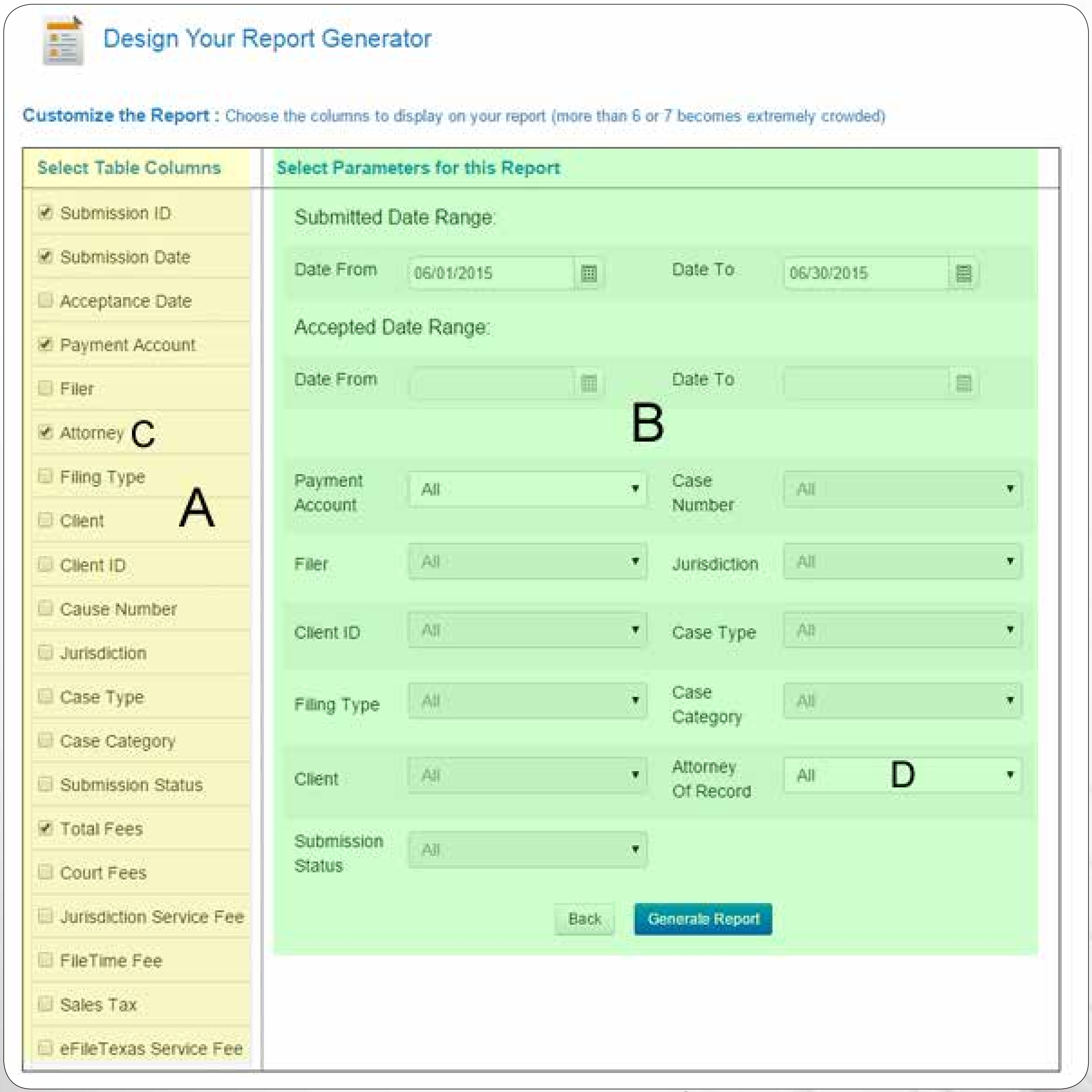
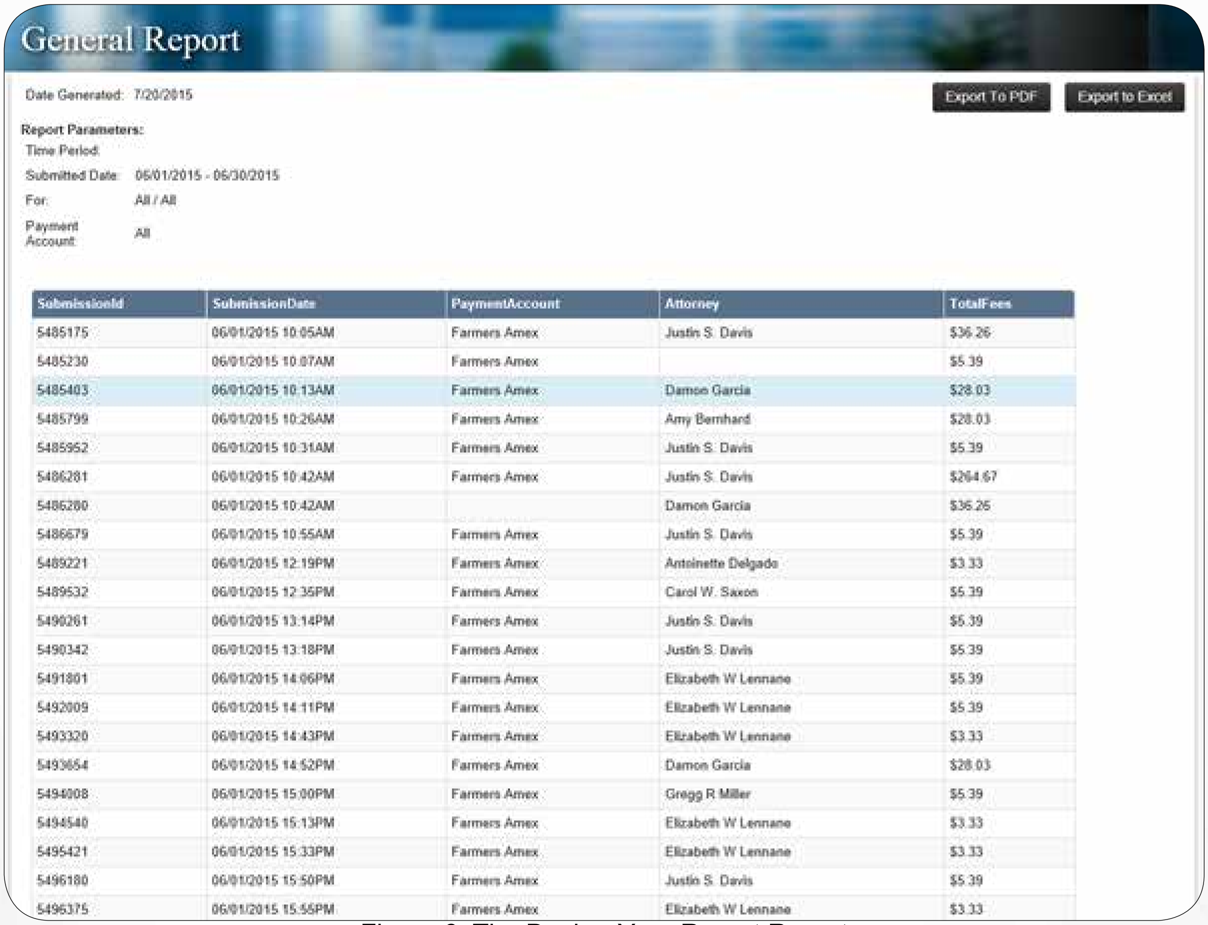


Figure 5, The Design-Your-Report Generator

Any data types you selected in section A above can now be filtered by the corresponding filter in section B. For example, since Attorney was selected in column A (Figure 5, C), the user can now choose to filter the report for a specific attorney (Figure 5, D), if desired. In this example the user wants to filter for all submissions by all firm attorneys for the selected date range.

If you select more than six or seven columns the initial report as you see it in Figure 6 will be quite crowded. However, after you export the report to Microsoft Excel® (csv) format you can then adjust the column widths to best suit your needs.

You can save this export this report to PDF file format.



General Report

Export To PDF | Export to Excel

Date Generated: 7/20/2015

Report Parameters:

Time Period:

Submitted Date: 06/01/2015 - 06/30/2015

For: All / All

Payment Account: All

SubmissionId	SubmissionDate	PaymentAccount	Attorney	TotalFees
5485175	06/01/2015 10:05AM	Farmers Amex	Justin S. Davis	$36.26
5485230	06/01/2015 10:07AM	Farmers Amex		$5.39
5485403	06/01/2015 10:13AM	Farmers Amex	Damon Garcia	$28.03
5485799	06/01/2015 10:26AM	Farmers Amex	Amy Bernhard	$28.03
5485952	06/01/2015 10:31AM	Farmers Amex	Justin S. Davis	$5.39
5486281	06/01/2015 10:42AM	Farmers Amex	Justin S. Davis	$264.67
5486280	06/01/2015 10:42AM		Damon Garcia	$36.26
5486679	06/01/2015 10:55AM	Farmers Amex	Justin S. Davis	$5.39
5489221	06/01/2015 12:19PM	Farmers Amex	Antoinette Delgado	$3.33
5489532	06/01/2015 12:35PM	Farmers Amex	Carol W. Saxon	$5.39
5490261	06/01/2015 13:14PM	Farmers Amex	Justin S. Davis	$5.39
5490342	06/01/2015 13:18PM	Farmers Amex	Justin S. Davis	$5.39
5491801	06/01/2015 14:06PM	Farmers Amex	Elizabeth W Lennane	$5.39
5492009	06/01/2015 14:11PM	Farmers Amex	Elizabeth W Lennane	$5.39
5493320	06/01/2015 14:43PM	Farmers Amex	Elizabeth W Lennane	$3.33
5493654	06/01/2015 14:52PM	Farmers Amex	Damon Garcia	$28.03
5494008	06/01/2015 15:00PM	Farmers Amex	Gregg R Miller	$5.39
5494540	06/01/2015 15:13PM	Farmers Amex	Elizabeth W Lennane	$3.33
5495421	06/01/2015 15:33PM	Farmers Amex	Elizabeth W Lennane	$3.33
5496180	06/01/2015 15:50PM	Farmers Amex	Justin S. Davis	$5.39
5496375	06/01/2015 15:55PM	Farmers Amex	Elizabeth W Lennane	$3.33

Figure 6, The Design-Your-Report Report

C. Credit Card Reconciliation Report

This option provides you a quick fairly detailed report of all accepted submissions and eService-only submissions for your firm during the date range you choose.

You can also choose to filter the report by Payment Account.

Figure 7, The Credit Card Reconciliation Report Generator

You can save this report in PDF or Microsoft Excel (csv) file formats.

The resulting report will resemble Figure 8.

Credit Card Reconciliation Report

Credit Card Reconciliation Report

Date Range: 03/01/2015 - 05/10/2015   Payment Account: All

Export to PDF   Export to Excel

ID	Submission Date	Acceptance Date	Cause Number	MatterNumber	Attorney	FilerName	Payment Account	Transaction #	Fees
110414	04-10-15	04-10-15	13-DCV-209661	FT2014-1110	Wilma Adair	Thomas Schoolcraft	AmEx		**Total** **$68.15**
109242	03-30-15	03-30-15	13-DCV-209661	FT2014-1110	Wilma Adair	Thomas Schoolcraft	Firm	120730	**Total** **$51.69**
105891	03-15-15	03-15-15	78690973	FT-15-11-9	Thomas Schoolcraft	Thomas Schoolcraft	Firm	118011	**Total** **$3.33**

Filings (110414):

Filing	Type	Description
Motion for New Trial	Both	

Jurisdiction	$66.24
eFileTexas	$1.91

Filings (109242):

Filing	Type	Description
No Fee Documents	Both	
No Fee Documents	Both	

Jurisdiction	$50.24
eFileTexas	$1.45

Filings (105891):

Filing	Type	Description
Motion (No Fee)	Both	

Jurisdiction	$3.24
eFileTexas	$0.09

Figure 8, Credit Card Reconciliation Report

D. Accepted Submissions Report

This report provides you greater control over what data is contained on your report of accepted filings for your firm than does the Credit Card Reconciliation Report. It takes more time to generate as you need to select which data fields you wish to have displayed. This report also enables you to be more selective of the data on which you wish to filter.

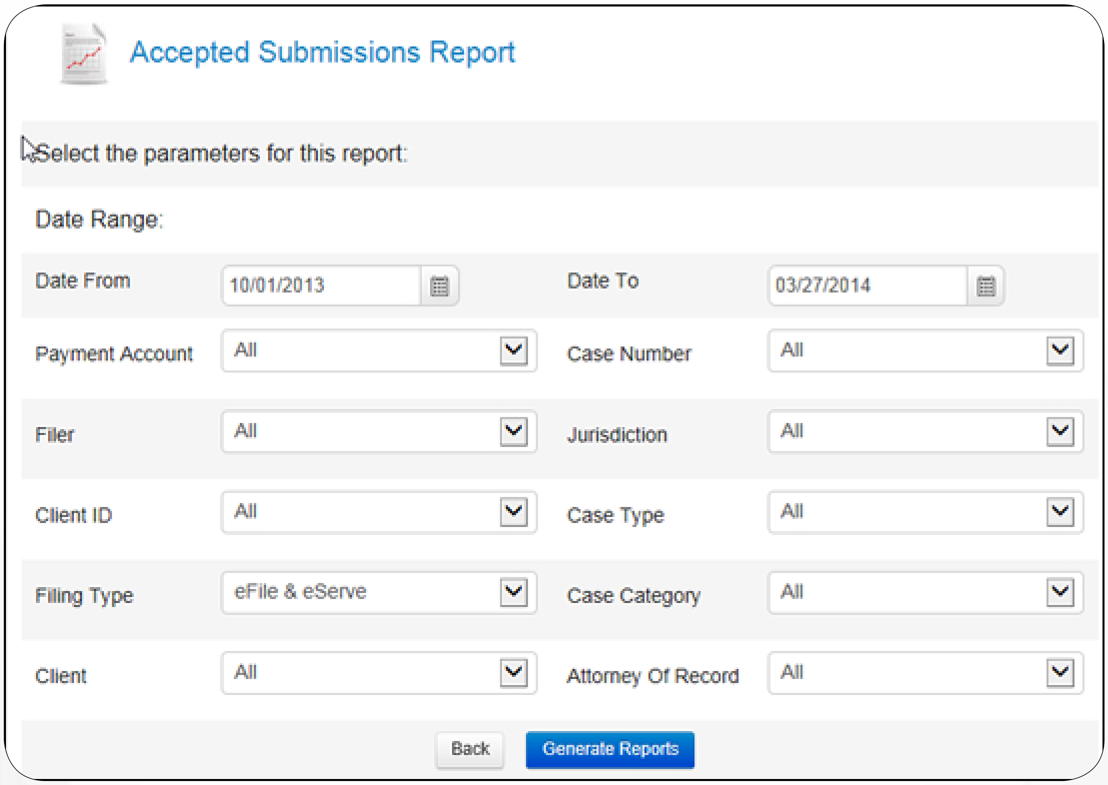


Figure 9, Accepted Submissions Report Generator

You can save this report in PDF format.

Figure 10 provides a sample report.

Accepted Submissions Report

Date Range: 03/01/2015 - 06/11/2015 Payment Account: All Attorney: All

Export to PDF | Export to Excel

ID	Submit Date	Accept Date	Cause Number	MatterNumber	Client	Fees	
116417	06-11-15	06-11-15	1-DG-34875	FT-20150611	Amy Greene	**Total**	**$303.77**
	Filing	Type	Description			Court Costs	$295.24
	Petition	Both				Other Fees	$8.53
114365	05-26-15	05-26-15	D-1-GN14-04216	FT-150526	Randall Woods	**Total**	**$328.47**
	Filing	Type	Description			Court Costs	$319.24
	Petition	Both				Other Fees	$9.23
113937	05-19-15	05-19-15	78690973	FT-15-11-9	tyra bankss	**Total**	**$3.33**
	Filing	Type	Description			Court Costs	$3.24
	No Fee Documents	Both				Other Fees	$0.09
110414	04-10-15	04-10-15	13-DCV-209661	FT2014-1110	Kingsley Osagie	**Total**	**$68.15**
	Filing	Type	Description			Court Costs	$66.24
	Motion for New Trial	Both				Other Fees	$1.91
109242	03-30-15	03-30-15	13-DCV-209661	FT2014-1110	Kingsley Osagie	**Total**	**$51.69**
	Filing	Type	Description			Court Costs	$50.24
	No Fee Documents	Both				Other Fees	$1.45
	No Fee Documents	Both					
105891	03-15-15	03-15-15	78690973	FT-15-11-9	tyra bankss	**Total**	**$3.33**
	Filing	Type	Description			Court Costs	$3.24
	Motion (No Fee)	Both				Other Fees	$0.09
					Total Submission Fees		**$758.74**

Figure 10, Sample Accepted Submissions Report

E. Accepted Filing Billing Report

Use this report to bill each case individual filings rather that by submission if that is your desire. Most firms bill by submission.

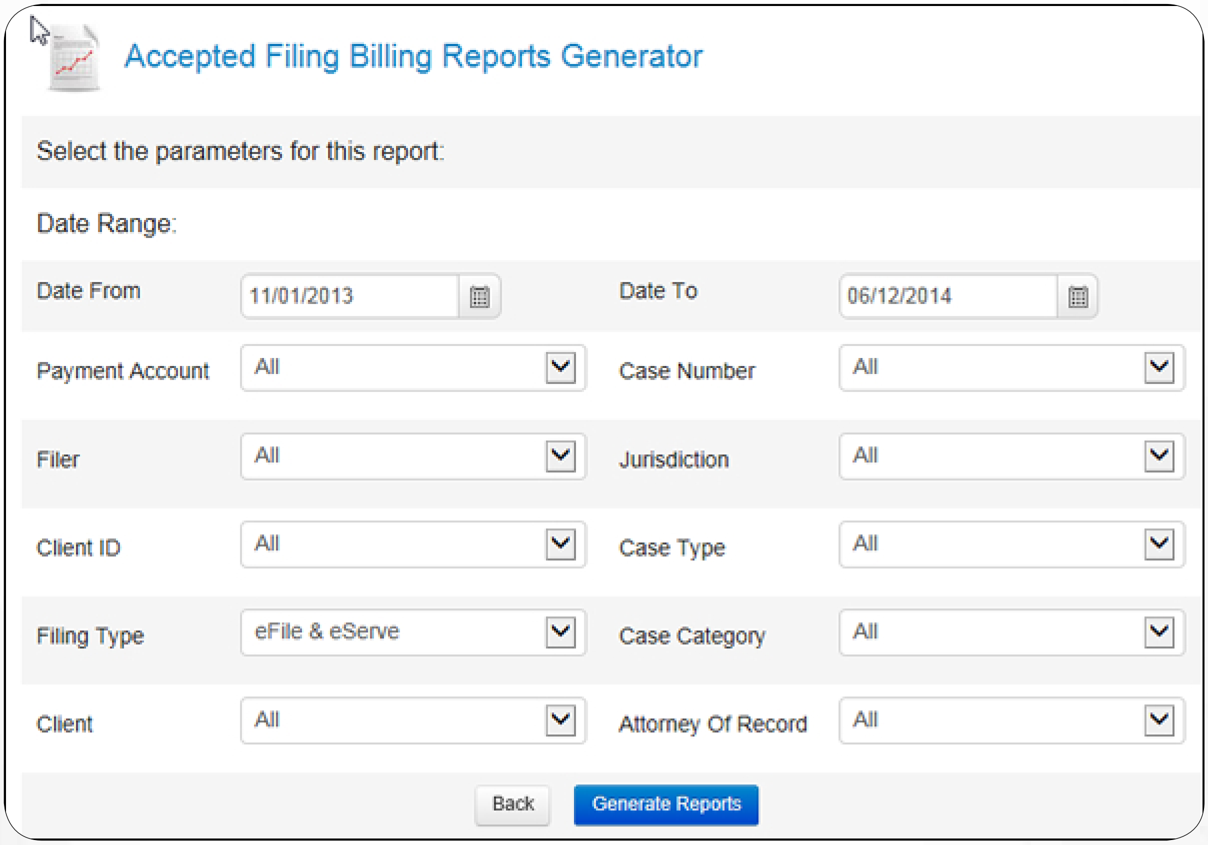


Figure 11, Accepted Filings Billing Report

By using the appropriate filtering parameters you can create a wide range of reports such as all filings by all firm members during a specified time period.

You can save this report in PDF or Microsoft Excel® (csv) format. View a sample PDF report here.

Accepted Filings Billing Report

Submission Acceptance Date Range: **03/01/2015 - 05/15/2015** Payment Account: **All** Attorney: **All**

Export to PDF Export to Excel

ID	Submission Date	Acceptance Date	Attorney	Cause Number	MatterNumber	Fees	
113789	05-15-15		Thomas Schoolcraft	201212345	FT20140819	**Total**	**$0.00**
	Filing	Type	Description	Status		Court	$0.00
	Service Only	EService		served		Other	$0.00
113656	05-13-15	05-13-15	Wilma Adair	13-DCV-209661	FT2014-1110	**Total**	**$0.00**
	Filing	Type	Description	Status		Court	$0.00
	Service Only	EService		served		Other	$0.00
110414	04-10-15	04-10-15	Wilma Adair	13-DCV-209661	FT2014-1110	**Total**	**$68.15**
	Filing	Type	Description	Status		Court	$66.24
	Motion for New Trial	Both		accepted		Other	$1.91
109242	03-30-15	03-30-15	Wilma Adair	13-DCV-209661	FT2014-1110	**Total**	**$51.69**
	Filing	Type	Description	Status		Court	$50.24
	No Fee Documents	Both		accepted		Other	$1.45
	No Fee Documents	Both		accepted			
105891	03-15-15	03-15-15	Thomas Schoolcraft	78690973	FT-15-11-9	**Total**	**$3.33**
	Filing	Type	Description	Status		Court	$3.24
	Motion (No Fee)	Both		accepted		Other	$0.09
					Total Submission Fees		**$123.17**

Figure 12, Sample Accepted Filings Billing Report

F. Individual Filing Report

Use this generate a separate, detailed, one-page report on each filing matching your filtering criteria.

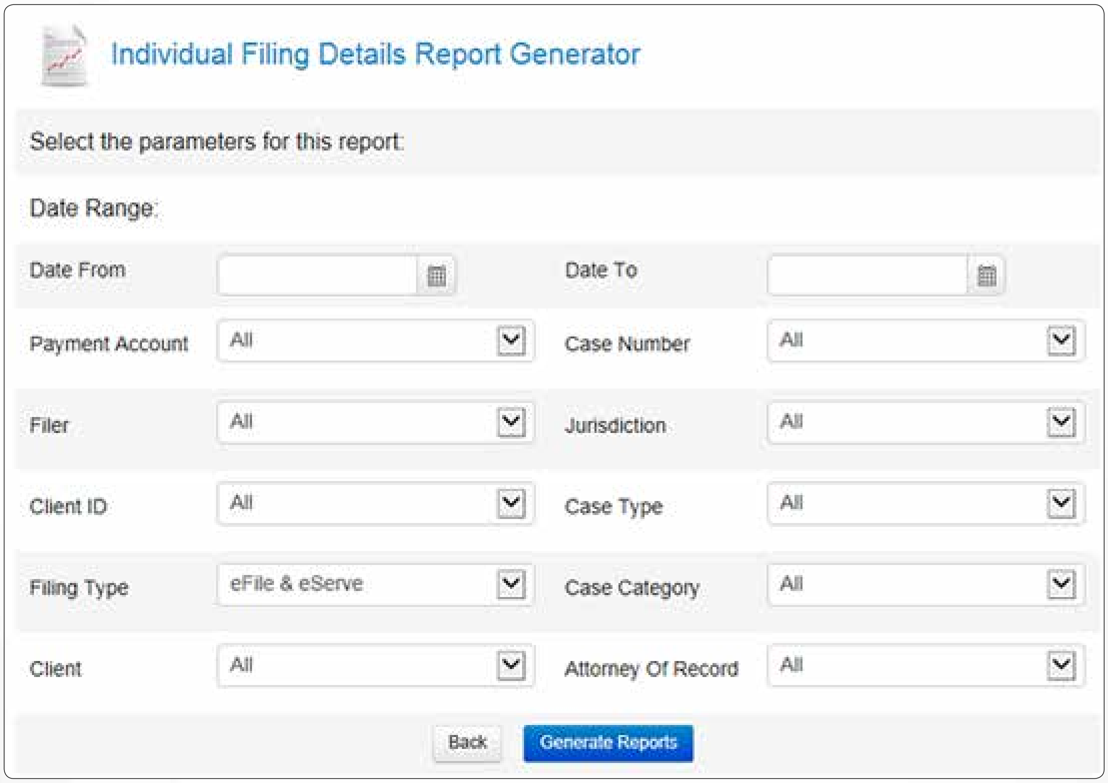


Figure 13, Individual Filings Report Generator

You can save this report in PDF format.

Each filing prints on a separate page and each page would resemble the following:

Filing Details

Date :	:	10/21/14
Type :	:	Both
Client ID:	:	2014-1021
Client:	:	AnnMarie V. Armstrong
Cause Number:	:	
Jurisdiction:	:	Bexar County - District Clerk
Filing Code:	:	150939
Attorney:	:	Kindra Reese
Filer:	:	Kindra J. Reese

Billing Details

Pending	:	$0.00
Jury Demand	:	$0.00
Case Initiation Fee	:	$272.00
Court Service Fee	:	$2.00
eFileTexas Convenience Fee	:	$8.21
FileTime Fee	:	$0.00
Sales Tax	:	$0.00
Total	:	**$292.21**

Payment Account

Firm

Billing Overview

Court Fees	:	$0.00
Other Fees	:	$10.21
Total Fees	:	$292.21

Figure 14, Sample Individual Filings Report

G. Export Report Generator

Use this feature to generate a report that you can save as a CSV file for importing the data into your firm's case management system.

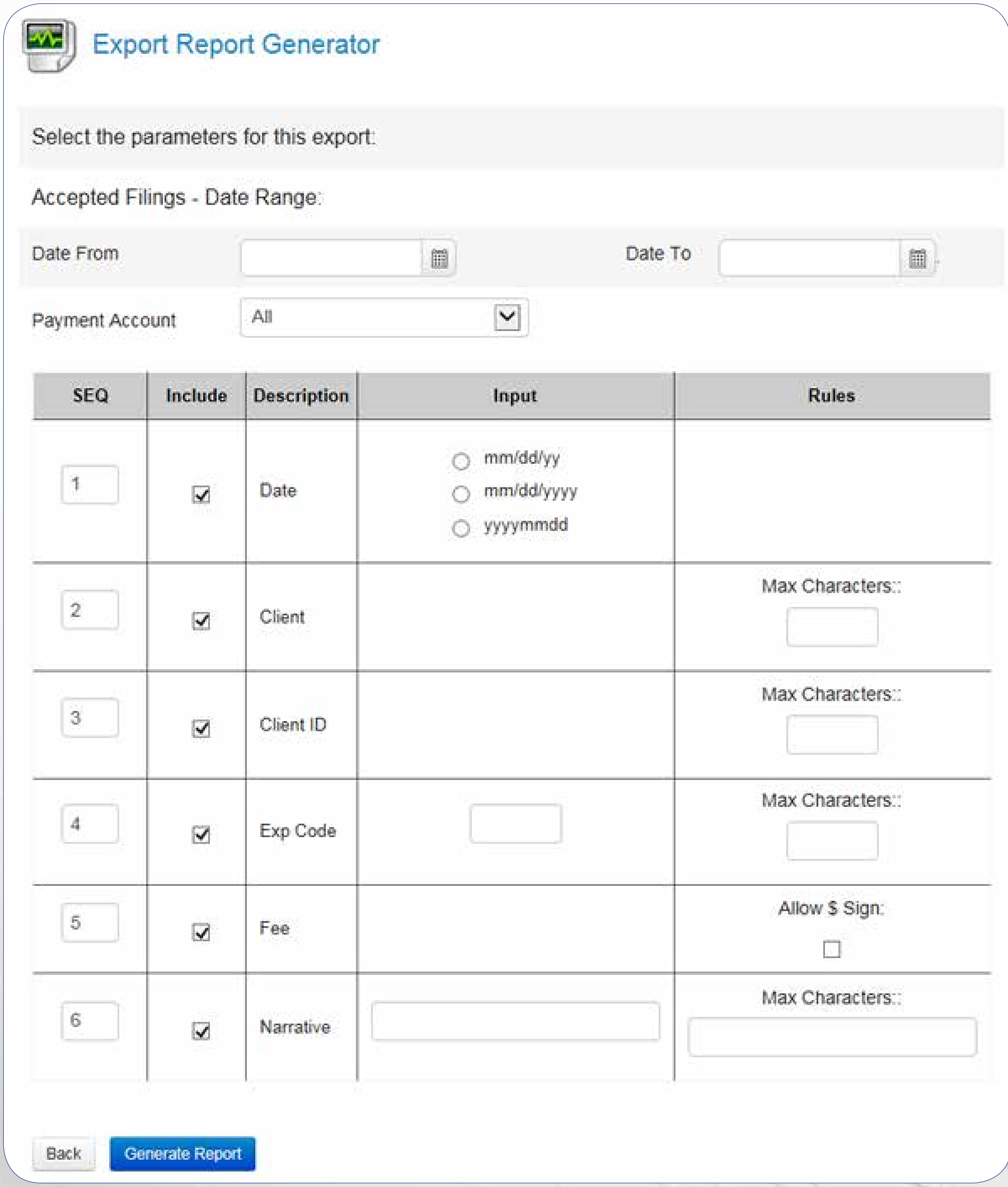


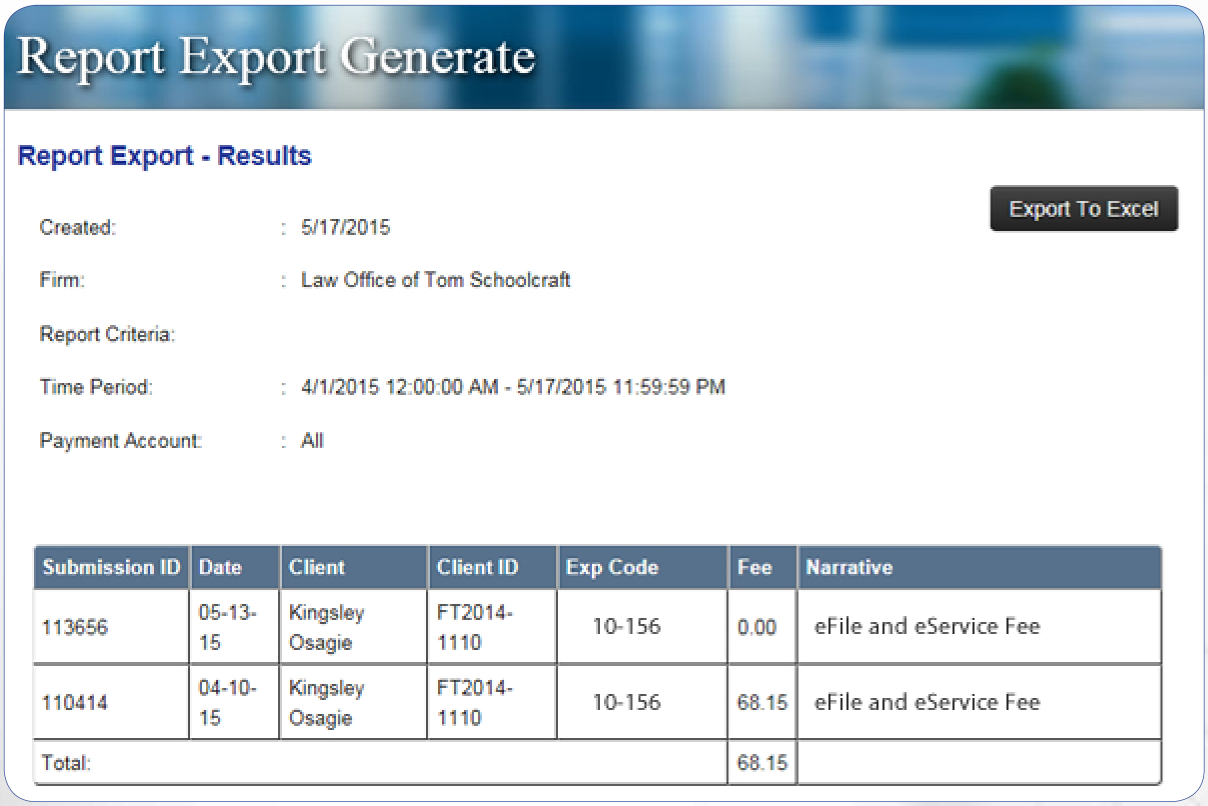
Figure 15, Export Report Generator

The data provided by default in this report is:

- **SEQ** - The Sequence column shows the order in which the data will display left-to-right in column format in your report
- **Include** - Uncheck the check box in this column to exclude the data in that row in your report.

- **Input** - This column provides a way for you to control the output format for:
  - **Date** – select the date formation you prefer
  - **Exp Code** – Enter the Expense code used in your case management system for billing eFilings.
  - **Narrative** – Enter whatever narrative you want to display for each filing billing
- **Rules** – This column enables you to define any data issues for the data for the row.
  - Set the maximum number of characters for specific data row if your case management system limits the number of characters for that data.
  - Select whether we should parse out $ for the Fees data as it is exported to the report.

Depending on the options you chose for the report it might resemble the following (Figure 65):


Report Export Generate

Report Export - Results

Export To Excel

Created: : 5/17/2015

Firm: : Law Office of Tom Schoolcraft

Report Criteria:

Time Period: : 4/1/2015 12:00:00 AM - 5/17/2015 11:59:59 PM

Payment Account: : All

Submission ID	Date	Client	Client ID	Exp Code	Fee	Narrative
113656	05-13-15	Kingsley Osagie	FT2014-1110	10-156	0.00	eFile and eService Fee
110414	04-10-15	Kingsley Osagie	FT2014-1110	10-156	68.15	eFile and eService Fee
Total:					68.15	

Figure 16, Sample General Report

3. eServices Reports

The eServices reports (Figure 17) enable you to view a list of eServices to your firm filers from case counsel (the Inbox) and eServices from your firm to other case counsel (Outbox).

Figure 17, eServices Reports

A. Inbox Reports

The Inbox report provides you a report of all eServices to your firm service contacts that match the filter criteria.

For example, if you are told that your firm was eServed by counsel in a case on a certain day and you are pretty certain that no one in your firm received the service, you could use this report and filter for all eServices received on that date, or for a date range, for the specific case.

In other instances, a firm administrator might run this report every morning, filtering for all inbound eServices firm-wide received the previous day. The purpose being to not overlook any inbound eServices.

You can filter the **Inbox Report** as shown in Figure 18.

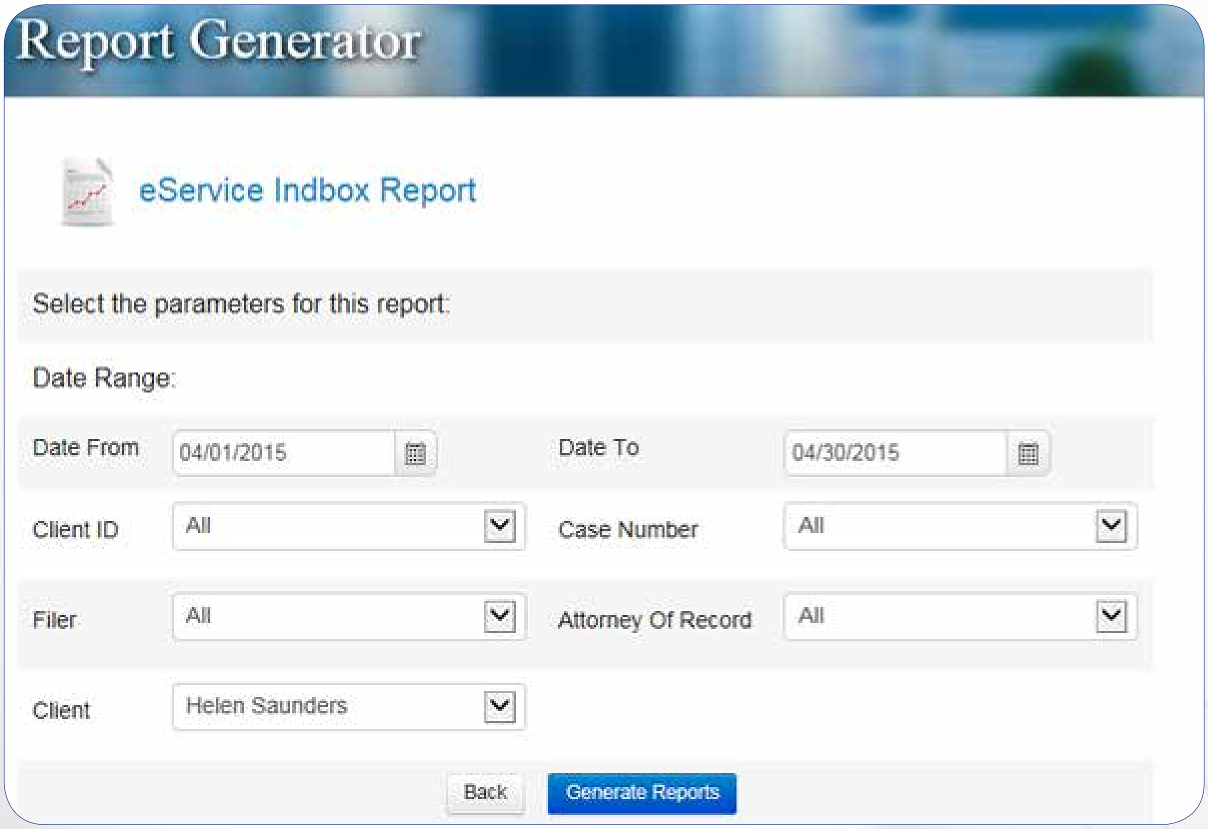


Figure 18, eService Inbox Report Generator

Enter your filtering criteria and click the **Generate Report** button.

Your report will resemble Figure 19.

eService Inbox Report

Date Range: 04/01/2015 - 04/30/2015 Client ID: All Case Number: All
Filer: All Attorney: All Client: Helen Saunders

Export to PDF Export to Excel

Served Date	Case Number	Jurisdiction	Attorney	Firm	Document
04/01/15	DC-14-12214	Dallas County - 191st District Court	Gabriela Valadez	Gabriela's Law Firm	Request for Production.pdf
04/01/15	DC-14-12214	Dallas County - 191st District Court	Gabriela Valadez	Gabriela's Law Firm	Request for Production.pdf
04/05/15	DC-14-12214	Dallas County - 191st District Court	Charles Smith	Smith, Peabody, and Brown	Motion for Discovery.pdf
04/05/15	DC-14-12214	Dallas County - 191st District Court	Charles Smith	Smith, Peabody, and Brown	Motion for Discovery.pdf
04/27/15	DC-14-12214	Dallas County - 191st District Court	Kindra Reese	Law Office of Tom Schoolcraft	Motion for Voir Dire of Expert Witnesses.pdf

Figure 19, eService Inbox Report

B. Outbox Reports

The eService Outbox Report Generator enables you to generate firm-wide reports of eService from your firm to other case counsel.

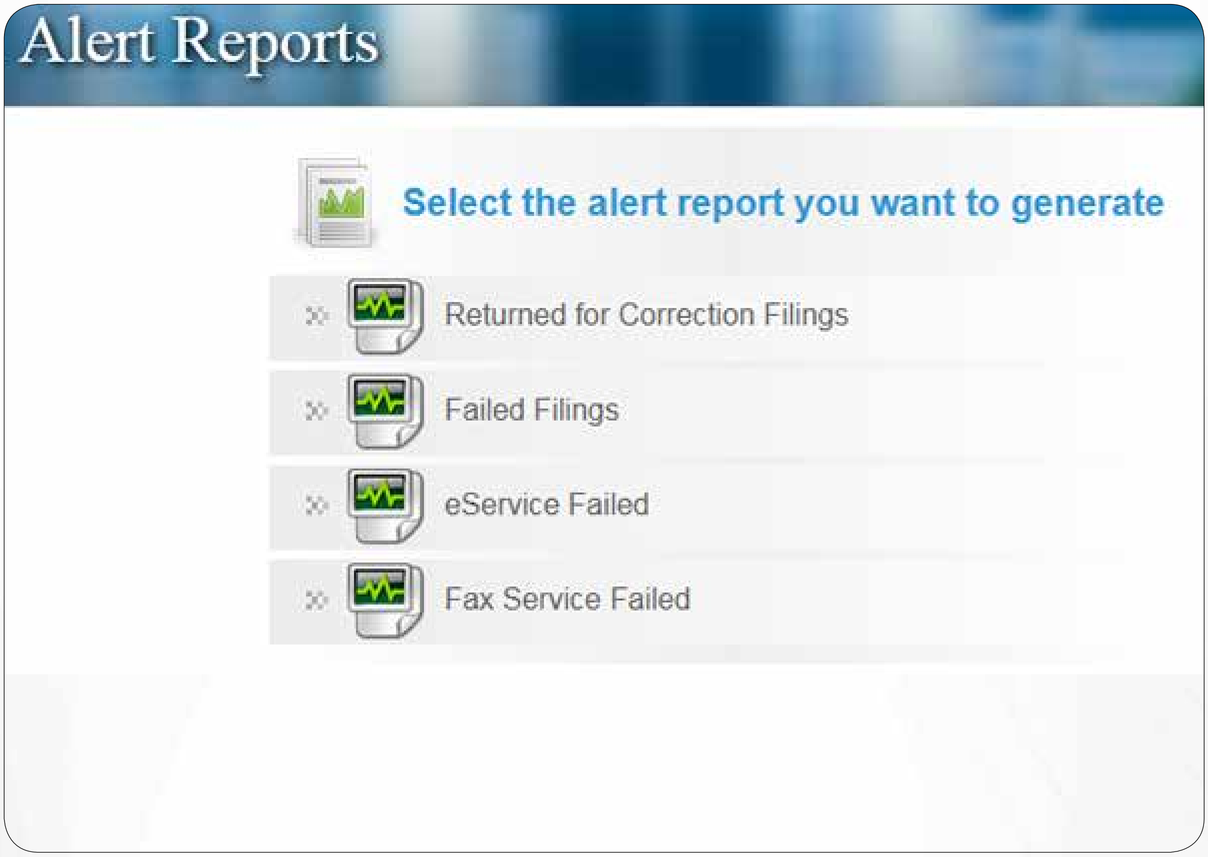


Figure 21, eService Outbox Report Generator

The report displays the following information for each eService that meets your search criteria:

- Date
- Client ID
- Case Number
- Recipient
- Document Served, and
- The status of each eService.

Generate this report in the same manner that you generate the eService Inbox Report.

View a sample report in Figure 22.

eService Outbox Report

Date Range: 06/01/2015 - 06/30/2015 Client ID: All Case Number: All

Filer: All Attorney: All Client: All

Date	Client ID	Case Number	Recipient	Document	Status
06/01/15		C-1230-15-C		DOA Casaraez v Farmers.pdf | Stamped__DOA Casaraez v Farmers.pdf |	
06/01/15		2015CVT000713D1		Rule 11 Agreement_Settlement_Serna.pdf | Stamped__Rule 11 Agreement_Settlement_Serna.pdf |	
06/01/15		2014-CCL-01028		DOA Bak v Farmers.pdf | Stamped__DOA Bak v Farmers.pdf |	
06/01/15		CL-15-1330-E		DOA E Infante.pdf | Stamped__DOA E Infante.pdf |	
06/01/15		CL-15-1689-H		20150601102440226.pdf | Stamped__20150601102440226.pdf |	
06/01/15		CL-15-1709-D		20150601103232633.pdf | Stamped__20150601103232633.pdf |	
06/01/15		DC-15-275		DOA Laura L Rodriguez.pdf | Stamped__DOA Laura L Rodriguez.pdf |	
06/01/15		CL-15-1689-H		20150601104424603.pdf | Stamped__20150601104424603.pdf |	
06/01/15		2012CCV-62205-2		Notice of Name Change - tpi.pdf | Stamped__Notice of Name Change - tpi.pdf |	
06/01/15		2014CVT001205D3		Charge.pdf | Stamped__Charge.pdf |	
06/01/15		CL-15-1709-D		20150601130857905.pdf | Stamped__20150601130857905.pdf |	
06/01/15		CL-15-1709-D		20150601131211507.pdf | Stamped__20150601131211507.pdf |	
06/01/15		2014CI02665		Notice of Name Change_Dixon.pdf | Stamped__Notice of Name Change_Dixon.pdf |	
06/01/15		14-05-0316-CVW		Vacation Letter_Koslowski.pdf | Stamped__Vacation Letter_Koslowski.pdf |	
06/01/15		389458		Vacation Letter_Mares.pdf | Stamped__Vacation Letter_Mares.pdf |	
06/01/15		2015-CCL-00256		First Amended Answer.pdf | Stamped__First Amended Answer.pdf |	
06/01/15		2012CI14430		Motion to Enter Judgment.pdf | Stamped__Motion to Enter Judgment.pdf |	
06/01/15		390131		Vacation Letter_Markgraf.pdf | Stamped__Vacation Letter_Markgraf.pdf |	

Figure 22, eService Outbox Report

4. Alerts Reports

The FileTime Alerts Manager provides a fast and easy way to view eFiling and eService issues firm-wide or for a specific filer or attorney.

We designed these reports for firms that want to assign someone to run the reports on a regular schedule to make sure that no failed filings, eServices, or fax services drop through the cracks.

To generate these reports click the **Alerts** option (Figure 1, C) on the **Reports** drop-down menu.

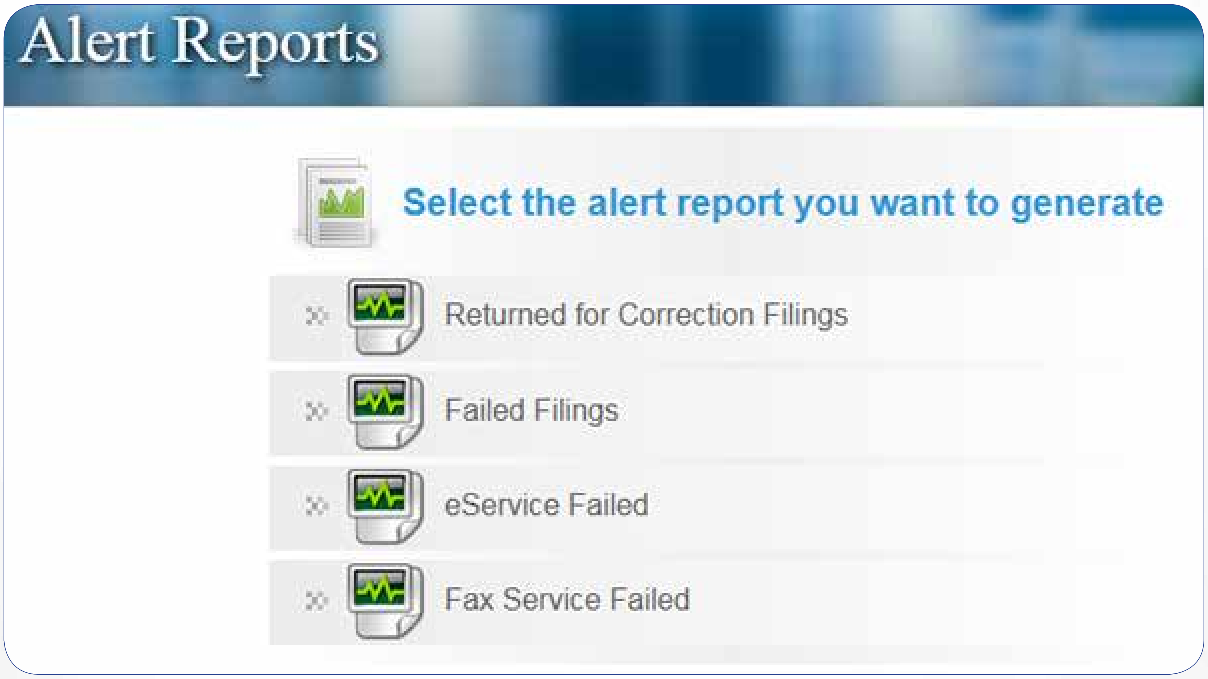


Figure 23, Alerts Reports Options

View details about each of the above reports on the following pages.

A. Returned for Correction Filings

This report enables you to view a listing of firm submissions Returned for Correction by the Clerk of Court. You can filter the report criteria based on multiple criteria. You can also choose to view all Returned for Correction submissions or only the ones that have not been resubmitted.

Figure 24, Returned for Correction Report Generator

All Returned for Correction filings meeting your search criteria are displayed on the report (Figure 25).

Fillings already resubmitted display a status of **Resubmitted**.

Filings that have not yet been resubmitted display a status of **Pending**.

Figure 25, Returned for Correction Report

B. Failed Filings

This report provides you a list of all submissions failed by the eFileTexas system based on the parameters you provide. You can even filter to see which ones have not been resubmitted.

Figure 26 shows the report generator page.

Figure 26, Failed Filings Report Generator

The resulting report (Figure 27) displays the basic info to identify the failed filing(s).

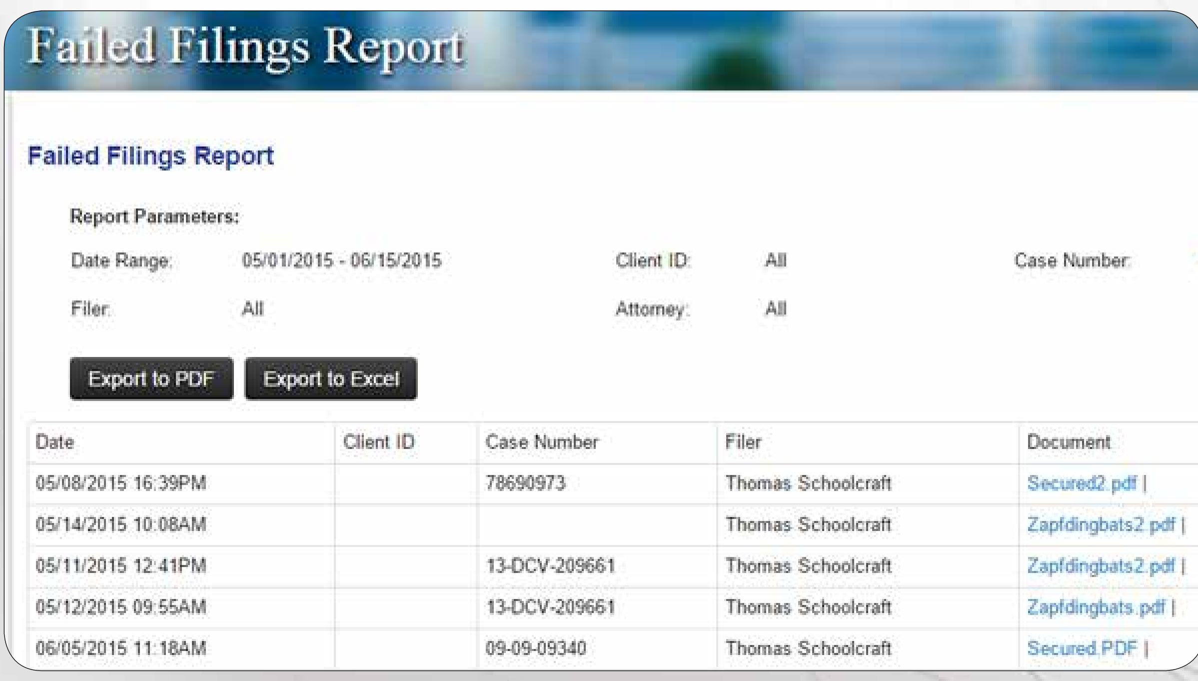


Figure 27, Failed Filings Report

C. eService Failed

This report provides you a list of eServices that eFileTexas was not able to deliver to the intended recipient.

Please note that the generator page (Figure 28) displays the usual filtering criteria. It also includes the ability to filter by the intended recipient to whom the eService failed.

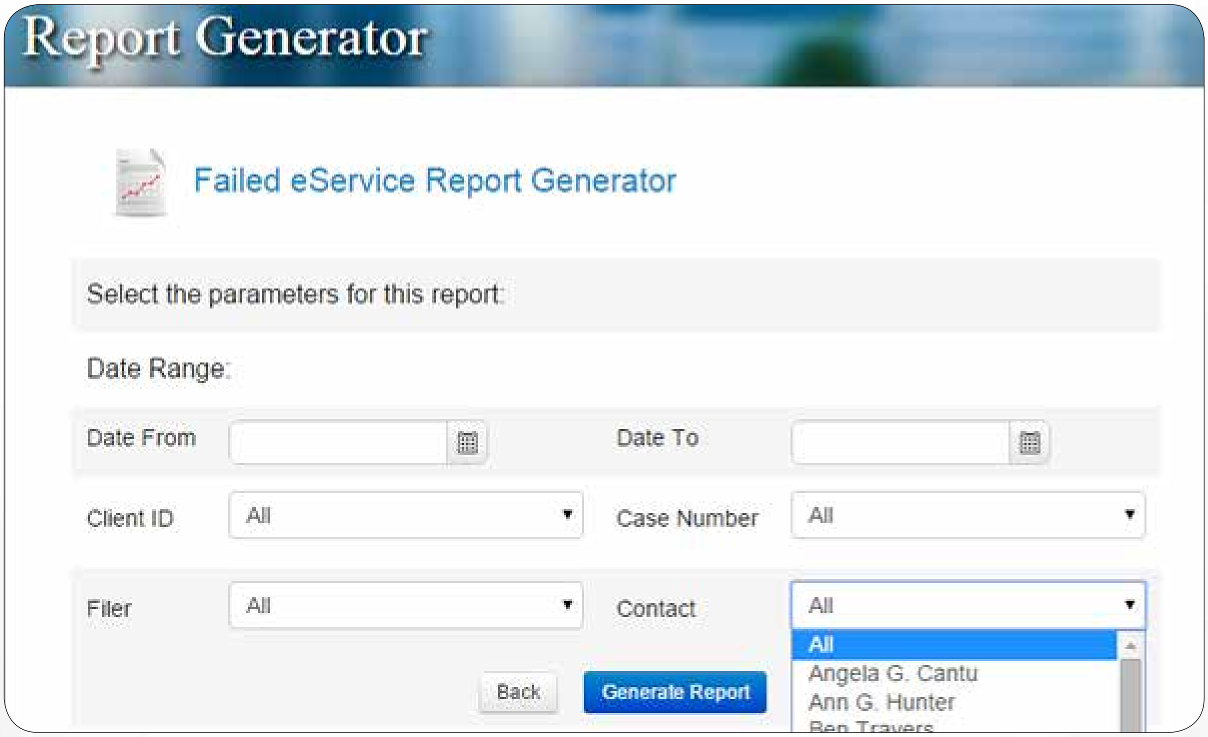


Figure 28, Failed eService Report Generator

Figure 29 shows a typical failed eService report.

Figure 29, Failed eService Report

D. Fax Service Failed

This report provides you a list of FileTime fax services that failed.

Complete the filtering criteria on the generator page and click the **Generate Report** button.

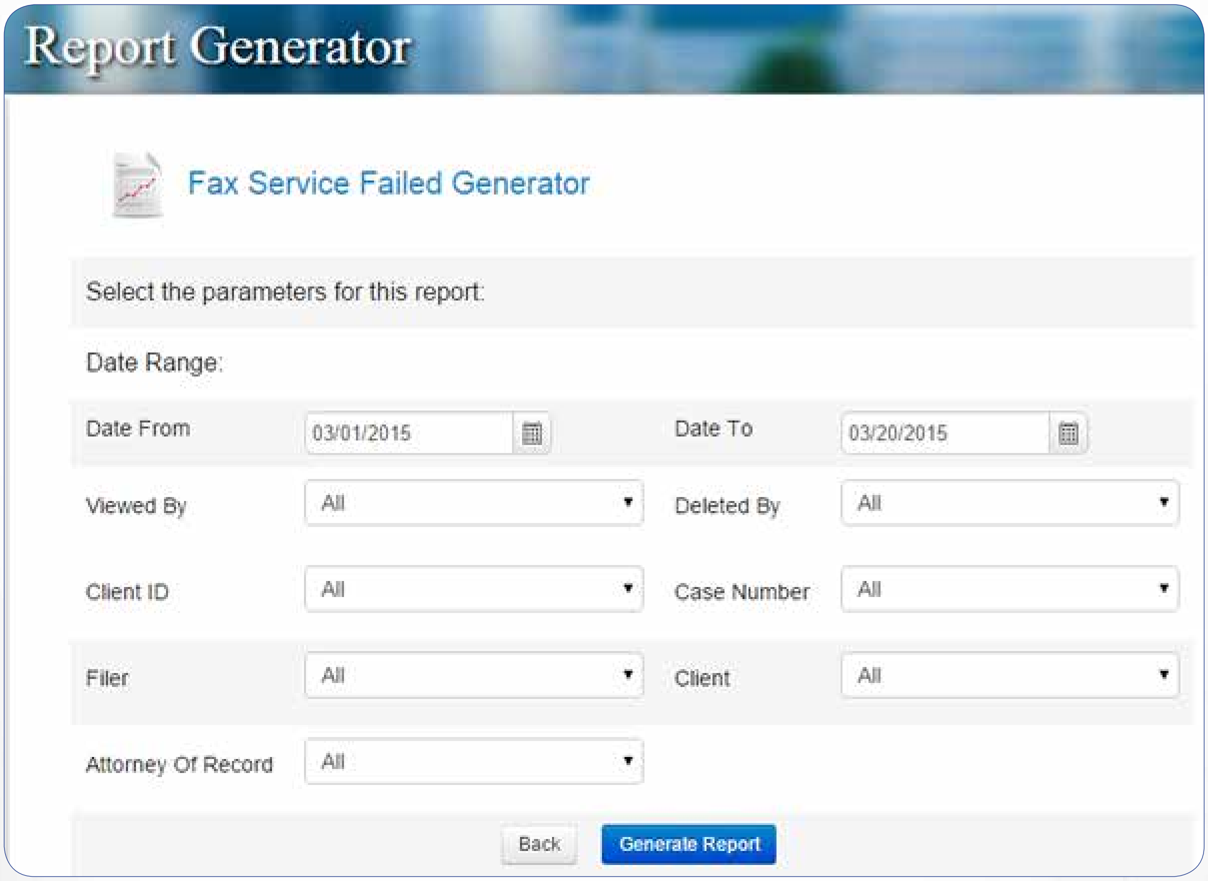


Figure 30, Failed Fax Service Report Generator

And FileTime generates a report firm-wide of any failed fax services.

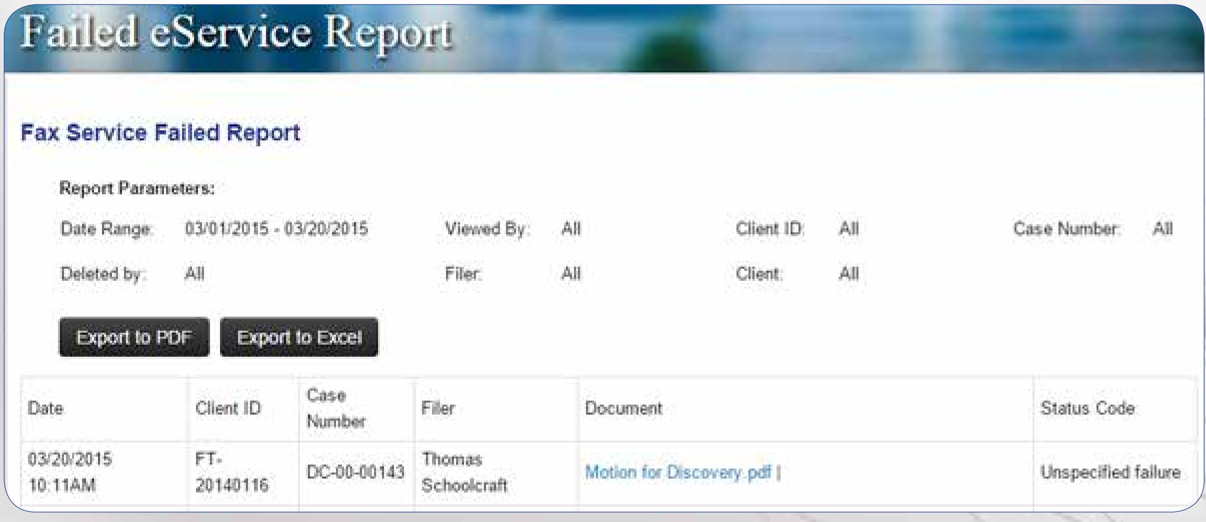


Figure 31, Failed Fax Service Report