FileTime Administrative Reports Guide

FileTime provides you 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 the issues that could adversely impact the outcome of your cases.

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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 feature.

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 firm's 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.

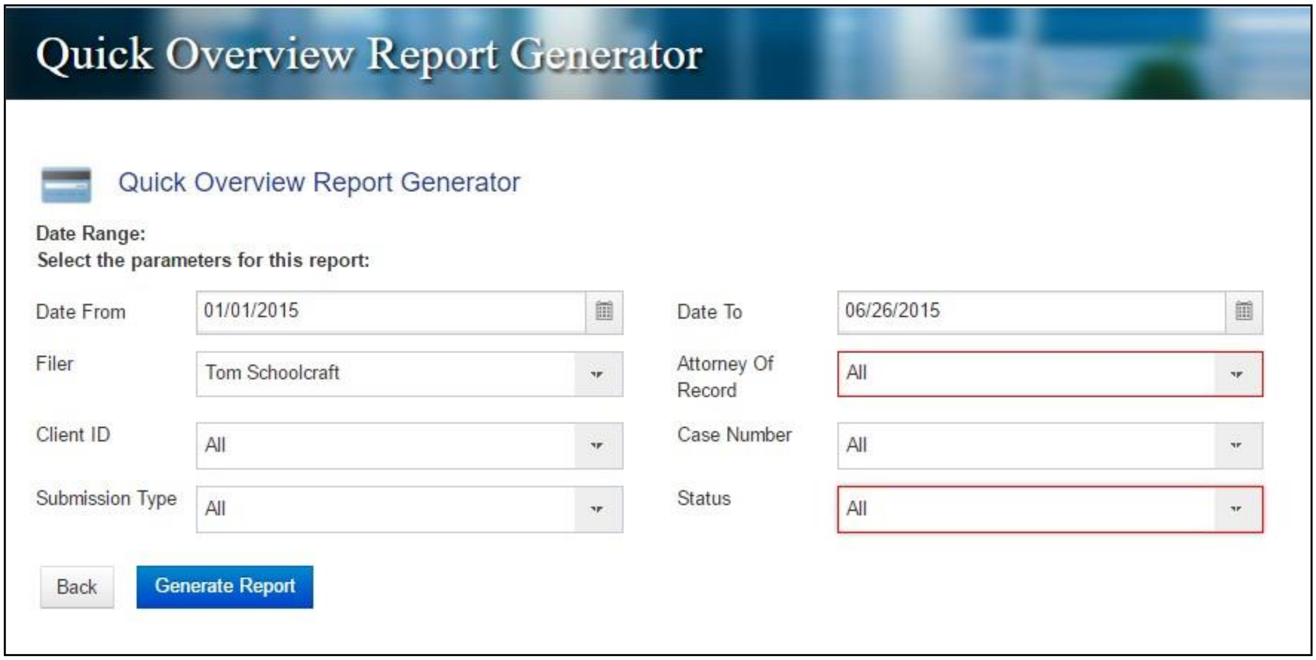


Figure 3, The Quick Overview Report Generator

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.

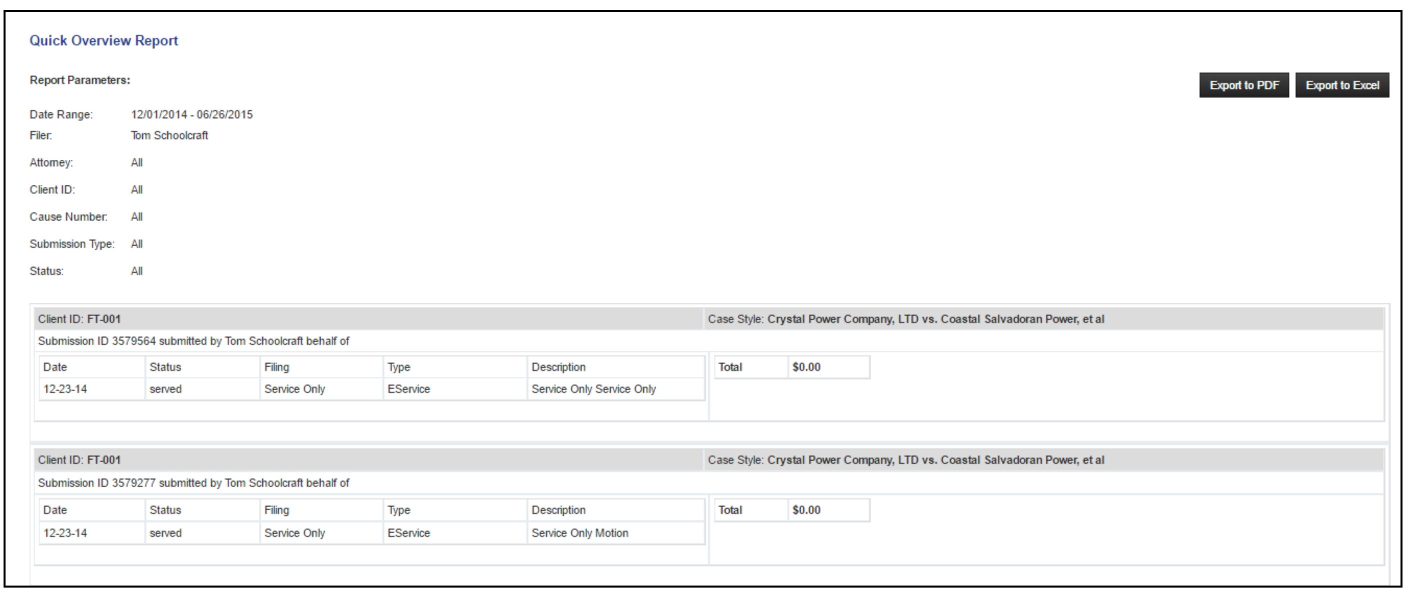


Figure 4, Sample Quick Overview Report

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.

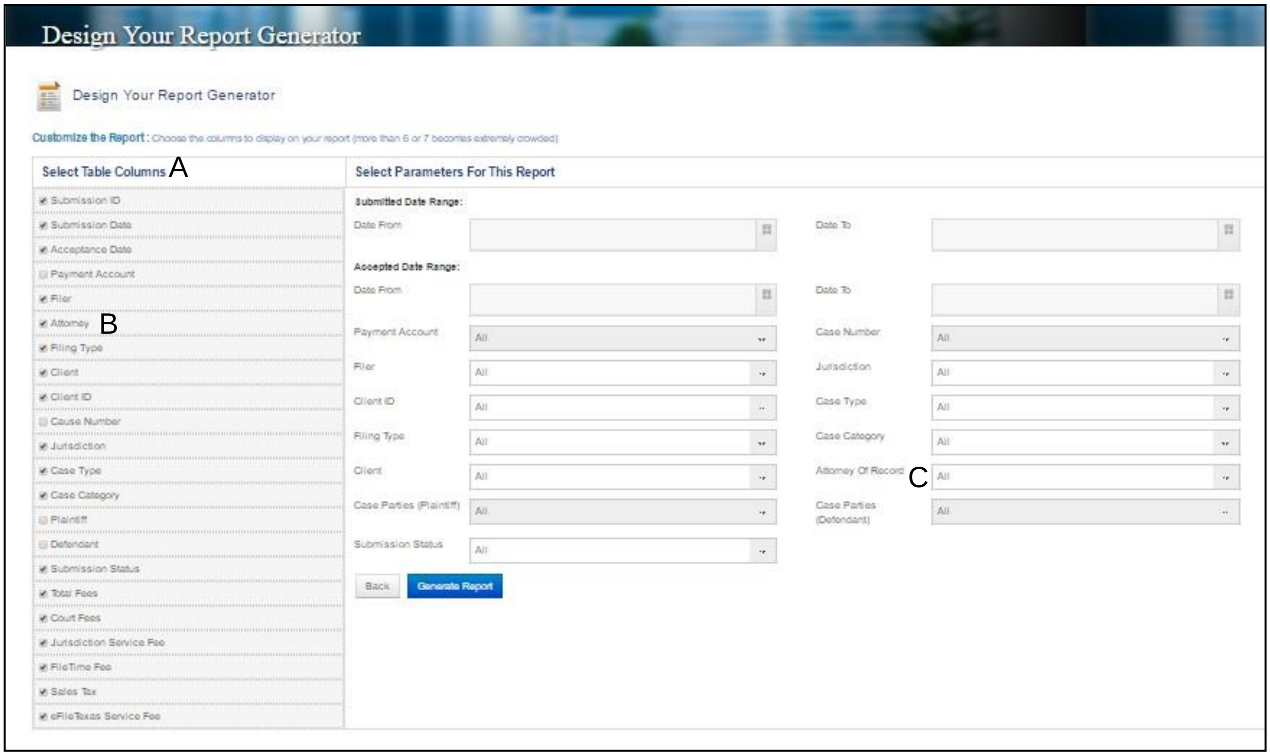


Figure 5, The Design-Your-Report Generator

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, B), the user can now choose to filter the report for a specific attorney (Figure 5, C), 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.

Your Custom Report

Export To PDF Export to Excel

Date Generated: 1/23/2017

Report Parameters:

For: All / All

Client ID: All Payment Account: All

Status: All

PaymentAccount	Attorney	MatterNumber	SubmissionStatus	TotalFees	CourtFees	JurisdictionServiceFee	FileTimeFee	Salestax	EFileTexasServiceFee
ABC	Jenifer s Malik	jenifer	filing has been accepted by the court	$371.68	$492.00	$2.00	$2.99	$0.25	$10.44
ABC	Jenifer s Malik			$268.79	$258.00	$0.00	$2.99	$0.25	$7.55
ABC	Jenifer s Malik	Mary	Filing was cancelled	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik		filing has been reviewed	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	jenifer	filing has been cancelled	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	Mary	filing has been accepted by the court	$11.56	$8.00	$0.00	$2.99	$0.25	$0.32
	Jenifer s Malik		filing has been submitted	$285.25	$272.00	$2.00	$2.99	$0.25	$8.01
ABC	Jenifer s Malik			$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	MALIK	filing has been accepted by the court	$295.54	$282.00	$2.00	$2.99	$0.25	$8.30
ABC	Jenifer s Malik		filing has been accepted by the court	$295.54	$282.00	$2.00	$2.99	$0.25	$8.30
ABC	Jenifer s Malik		filing has been served	$3.33	$0.00	$0.00	$2.99	$0.25	$0.09
	Jenifer s Malik		filing has been submitted	$56.84	$0.00	$0.00	$2.99	$0.25	$1.60
ABC	Jenifer s Malik		filing has been submitted	$3.33	$0.00	$0.00	$2.99	$0.25	$0.09
ABC	Jenifer s Malik		filing has been submitted	$355.22	$277.00	$0.00	$2.99	$0.25	$9.98
ABC	Jenifer s Malik		filing has been submitted	$3.33	$0.00	$0.00	$2.99	$0.25	$0.09
ABC	Jenifer s Malik	hgs	filing has been submitted	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	jenifer	filing is under review	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	jenifer	filing has been rejected	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	JM7869	filing has been submitted	$262.62	$252.00	$0.00	$2.99	$0.25	$7.38
Waiver	Jenifer s Malik	Karen	filing has been cancelled	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
ABC	Jenifer s Malik	Mary	filing has been cancelled	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

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, below.

Credit Card Reconciliation Report

Credit Card Reconciliation Report

Date Range: 01/01/2013 - 06/26/2015 Payment Account: All

Export to PDF Export to Excel

ID	Submission Date	Acceptance Date	Cause Number	MatterNumber	Attorney	FilerName	Payment Account	Transaction #	Fees
3579564	12/23/14 12:57 PM CST	12/23/14 12:58 PM CST	46341-B	FT-001		Tom Schoolcraft	Pro Bono		Total $0.00

Filings:

Filing	Type	Description
Service Only	EService	Service Only Service Only

Fee	Amount
Jurisdiction	$0.00
eFiling Manager	$0.00

ID	Submission Date	Acceptance Date	Cause Number	MatterNumber	Attorney	FilerName	Payment Account	Transaction #	Fees
3579277	12/23/14 12:40 PM CST	12/23/14 12:40 PM CST	46341-B	FT-001		Tom Schoolcraft	Pro Bono		Total $0.00

Filings:

Filing	Type	Description
Service Only	EService	Service Only Motion

Fee	Amount
Jurisdiction	$0.00
eFiling Manager	$0.00

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.

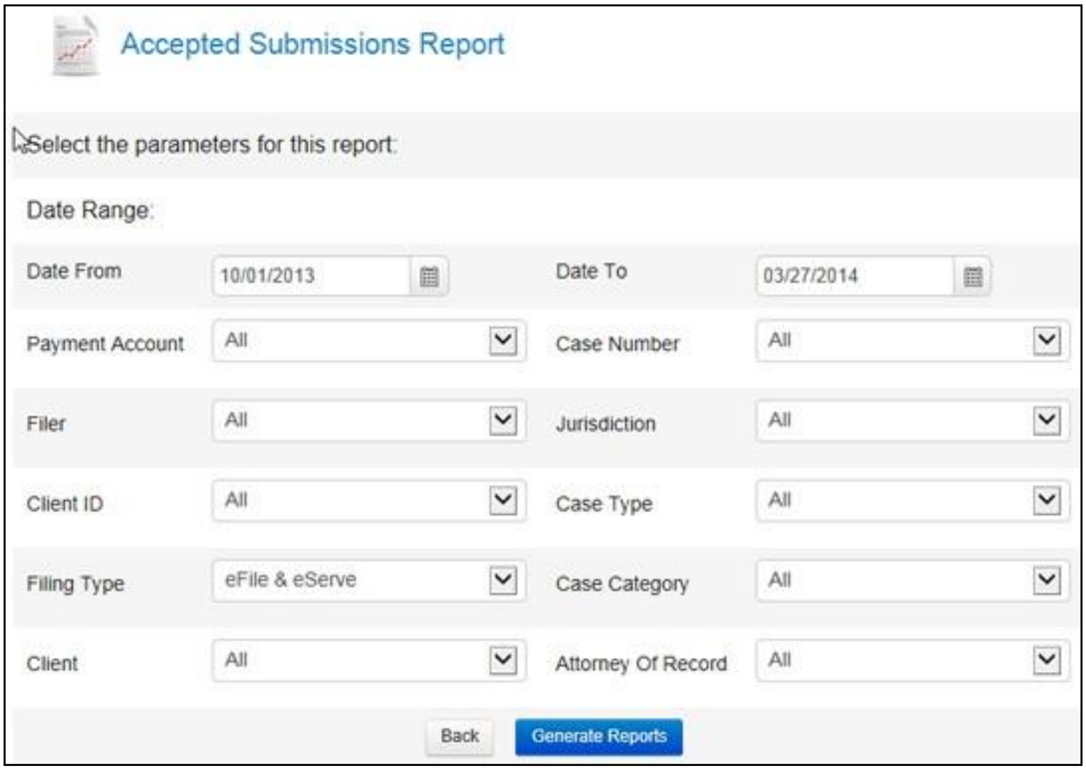


Figure 9, Accepted Submissions Report Generator

You can save this report in PDF format.

Figure 10 provides a sample report.

Accepted Submissions Report

Date Range: 10/01/2016 - 11/10/2016 Payment Account: All Attorney: All

Export to PDF Export to Excel

ID	Submit Date	Accept Date	Cause Number	MatterNumber	Client	Fees	
156973	10-18-16	10-19-16	564326		bfg ghj	Total	$295.54
	Filing	Type	Description			Court Costs	$284.00
		Both				Other Fees	$11.54
156911	10-17-16	10-17-16	2016CI31245	MALIK	malik malik	Total	$295.54
	Filing	Type	Description			Court Costs	$284.00
		Both				Other Fees	$11.54
156904	10-17-16	10-17-16	123456	Mary	Roger Ranch	Total	$11.56
	Filing	Type	Description			Court Costs	$8.00
		Both				Other Fees	$3.56
156715	10-11-16	10-11-16	42387-2016			Total	$466.34
	Filing	Type	Description			Court Costs	$450.00
	Petition	Both	Petition for employment issue			Other Fees	$16.34
156713	10-11-16	10-11-16	D-16-2016-55-2		Rosy Van	Total	$358.30
	Filing	Type	Description			Court Costs	$345.00
	Petition	Both	Petition			Other Fees	$13.30
	Petition	Both	Petition				
156696	10-11-16	10-11-16	2016CI10256	jenifer	mary j	Total	$371.68
	Filing	Type	Description			Court Costs	$358.00
	Petition	Both	Petition for adotion			Other Fees	$13.68
	Petition	Both	Petition				
Total Submission Fees						$1,798.96	

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.

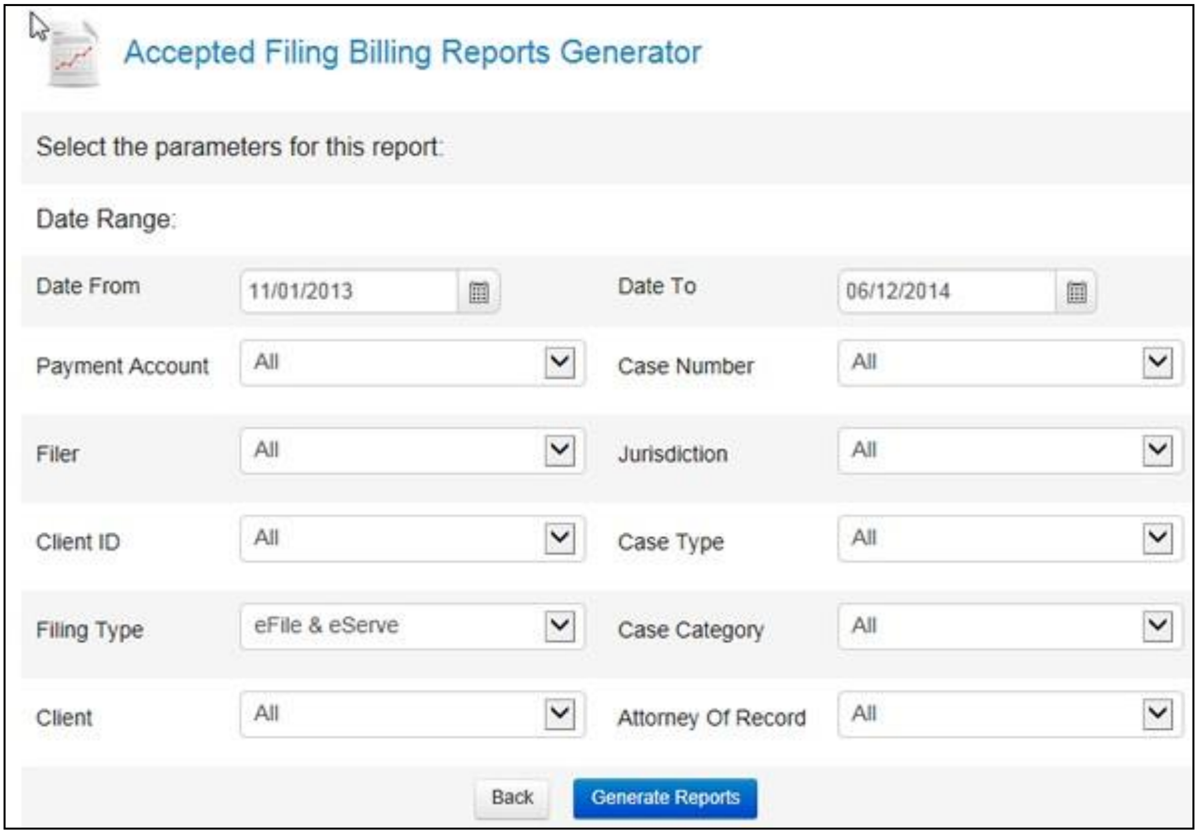


Figure 11, Accepted Filings Billing Report

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: **09/10/2016 - 11/16/2016** Payment Account: **All** Attorney: **All**

Export to PDF | Export to Excel

ID	Submission Date	Acceptance Date	Attorney	Cause Number	MatterNumber	Fees	
156973	10-18-16	10-19-16	Jenifer s Malik	564326		**Total**	**$295.54**
	Filing	Type	Description	Status		Court	$284.00
		Both		accepted		Other	$11.54
156954	10-18-16	10-18-16	Jenifer s Malik	20161025		**Total**	**$3.33**
	Filing	Type	Description	Status		Court	$0.00
		EService		served		Other	$3.33
156911	10-17-16	10-17-16	Jenifer s Malik	2016CI31245	MALIK	**Total**	**$295.54**
	Filing	Type	Description	Status		Court	$284.00
		Both		accepted		Other	$11.54
	Filing	Type	Description	Status		Court	$8.00
		Both		accepted		Other	$3.56
156715	10-11-16	10-11-16	Jenifer s Malik	42387-2016		**Total**	**$466.34**
	Filing	Type	Description	Status		Court	$450.00
	Petition	Both	Petition for employment issue	accepted		Other	$16.34
156713	10-11-16	10-11-16	Jenifer s Malik	D-16-2016-55-2		**Total**	**$358.30**
	Filing	Type	Description	Status		Court	$345.00
	Petition	Both	Petition	accepted		Other	$13.30
	Petition	Both	Petition	accepted			
156696	10-11-16	10-11-16	Jenifer s Malik	2016CI10256	jenifer	**Total**	**$371.68**
	Filing	Type	Description	Status		Court	$358.00
	Petition	Both	Petition for adotion	accepted		Other	$13.68
	Petition	Both	Petition	accepted			
Total Submission Fees						**$1,802.29**	

Figure 12, Sample Accepted Filings Billing Report

F. Individual Filing Report

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

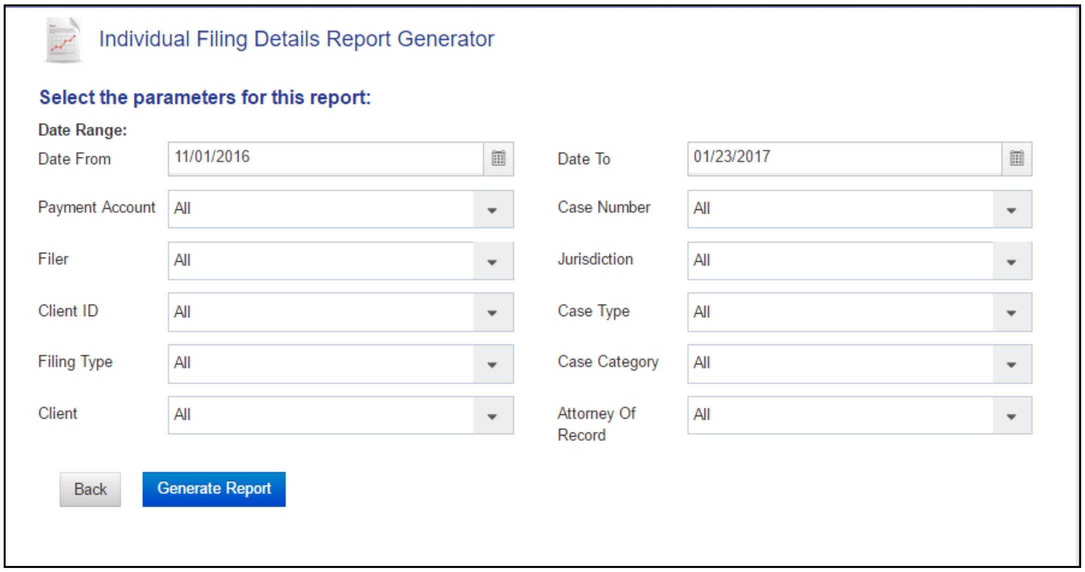
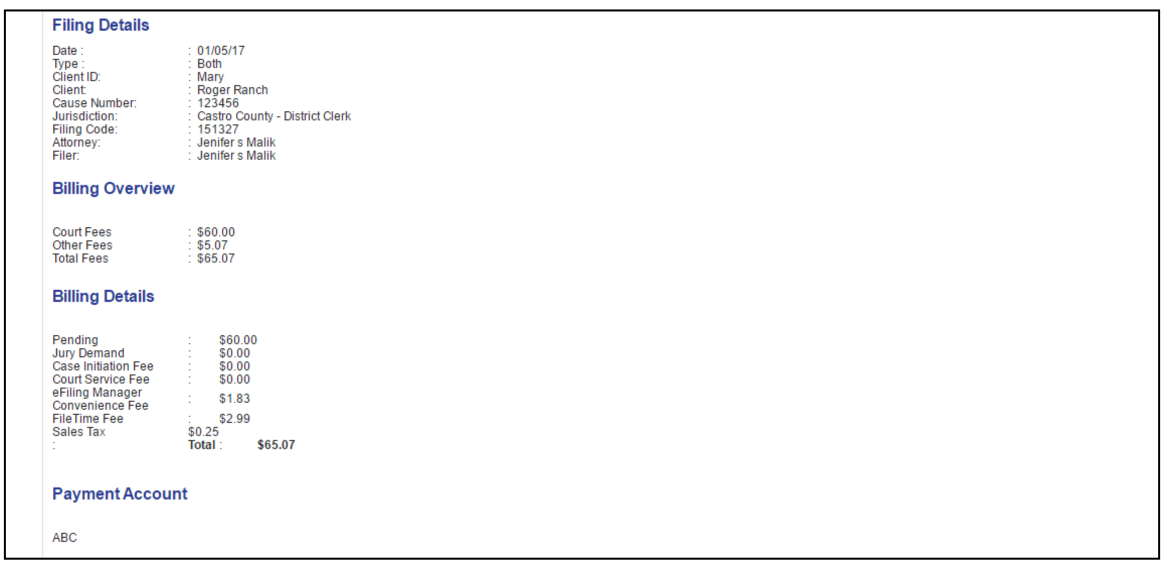


Figure 13, Individual Filings Report Generator

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 : : 01/05/17
Type : : Both
Client ID: : Mary
Client: : Roger Ranch
Cause Number: : 123456
Jurisdiction: : Castro County - District Clerk
Filing Code: : 151327
Attorney: : Jenifer s Malik
Filer: : Jenifer s Malik

Billing Overview

Court Fees : $60.00
Other Fees : $5.07
Total Fees : $65.07

Billing Details

Pending : $60.00
Jury Demand : $0.00
Case Initiation Fee : $0.00
Court Service Fee : $0.00
eFiling Manager Convenience Fee : $1.83
FileTime Fee : $2.99
Sales Tax $0.25
: **Total : $65.07**

Payment Account

ABC

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.

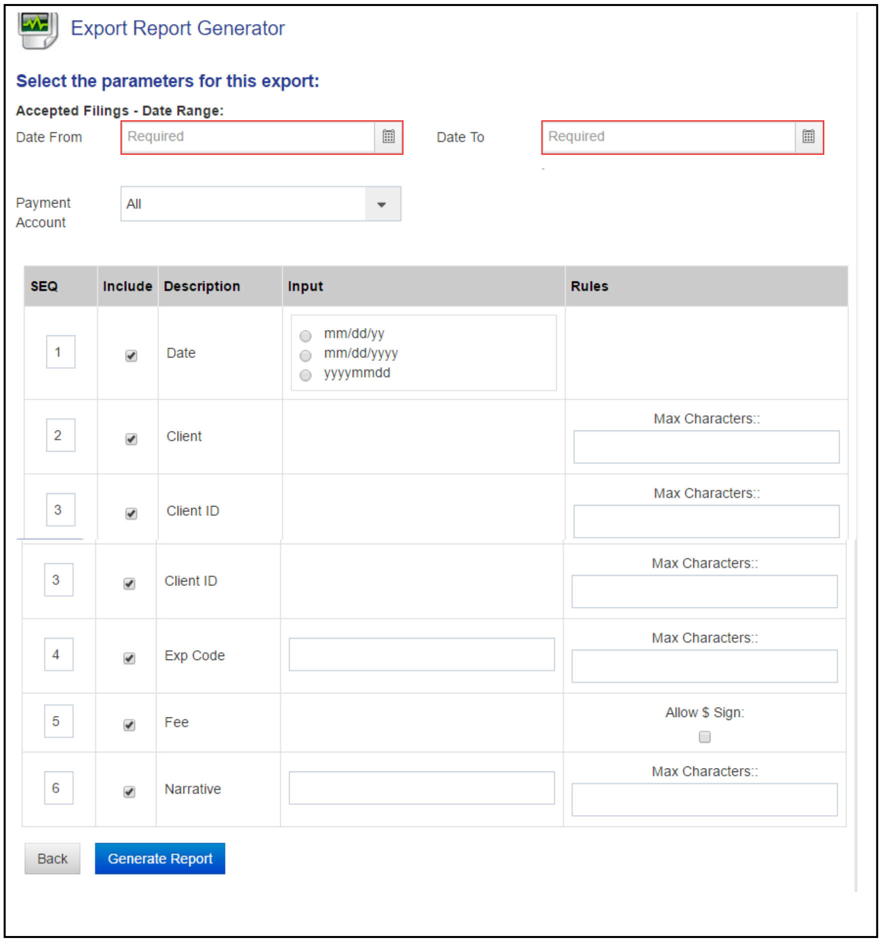


Figure 15, Export Report Generator

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


Export Report

Report Export - Results

Created: : 1/23/2017
Firm: : ABC Associates
Report Criteria:
Time Period: : 10/14/2016 12:00:00 AM - 1/23/2017 11:59:59 PM
Payment Account: : All

Export To Excel

ID	Date	Client	Client ID	Exp Code	Fee ($)	Narrative
156973	10-19-16	bfg ghj			295.54	
156954	10-18-16	John Cena			3.33	
156911	10-17-16	malik malik	MALIK		295.54	
156904	10-17-16	Roger Ranch	Mary		11.56	
Total:					605.97	

Figure 16, Sample General Report

3. eServices Reports

The eServices reports (Figure 17-01, B) enable you to view a list of eServices to your firm filers from case counsel (Inbox) and eServices from your firm to other case counsel (Outbox).

Figure 17-01 eServices Reports

Figure 17-02 eService 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.

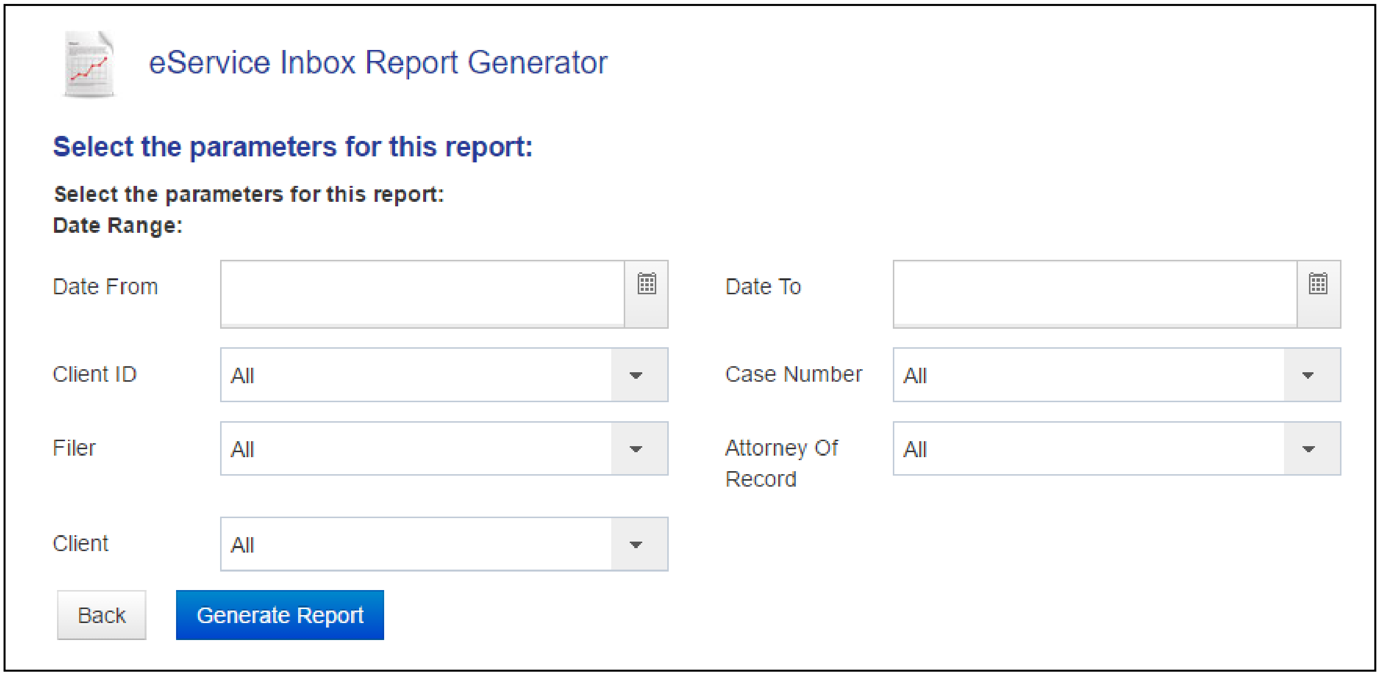
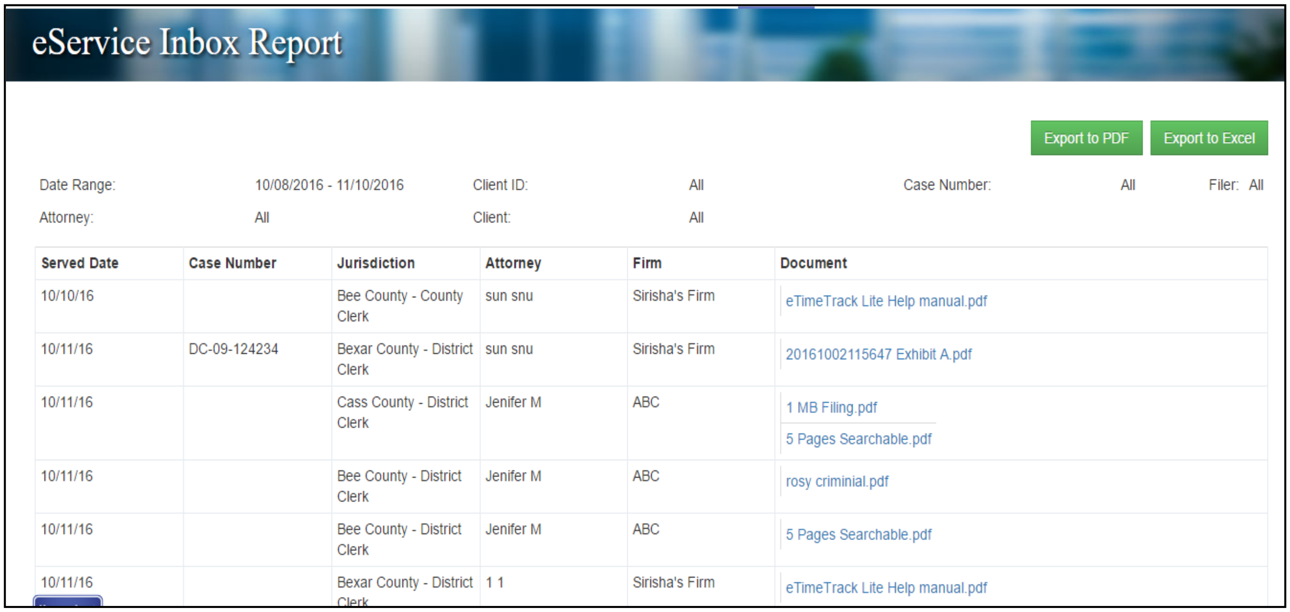


Figure 18, eService Inbox Report Generator

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

Your report will resemble Figure 19.



eService Inbox Report

Export to PDF | Export to Excel

Date Range:	10/08/2016 - 11/10/2016	Client ID:	All	Case Number:	All	Filer:	All
Attorney:	All	Client:	All				

Served Date	Case Number	Jurisdiction	Attorney	Firm	Document
10/10/16		Bee County - County Clerk	sun snu	Sirisha's Firm	eTimeTrack Lite Help manual.pdf
10/11/16	DC-09-124234	Bexar County - District Clerk	sun snu	Sirisha's Firm	20161002115647 Exhibit A.pdf
10/11/16		Cass County - District Clerk	Jenifer M	ABC	1 MB Filing.pdf 5 Pages Searchable.pdf
10/11/16		Bee County - District Clerk	Jenifer M	ABC	rosy criminial.pdf
10/11/16		Bee County - District Clerk	Jenifer M	ABC	5 Pages Searchable.pdf
10/11/16		Bexar County - District Clerk	1 1	Sirisha's Firm	eTimeTrack Lite Help manual.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.

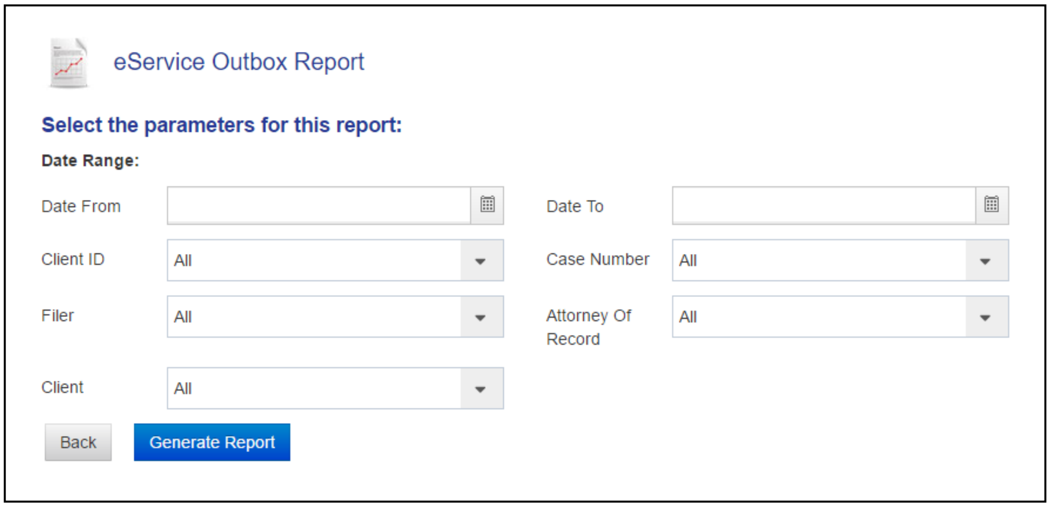


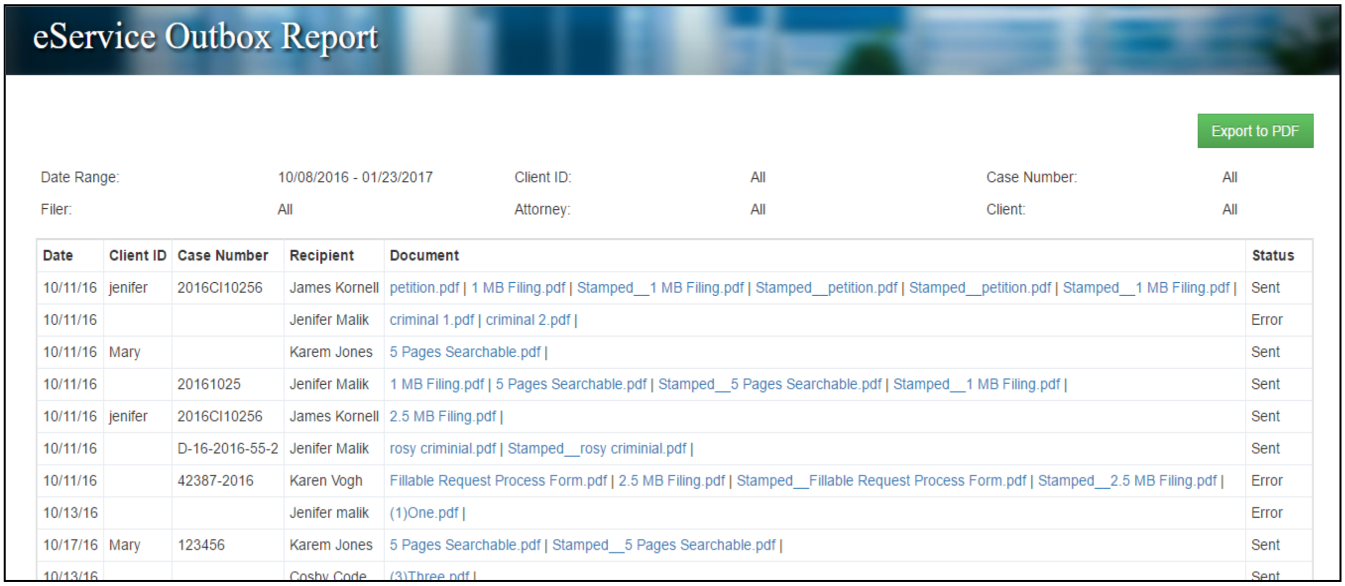
Figure 21, eService Outbox Report Generator

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

Export to PDF

Date Range:	10/08/2016 - 01/23/2017	Client ID:	All	Case Number:	All
Filer:	All	Attorney:	All	Client:	All

Date	Client ID	Case Number	Recipient	Document	Status
10/11/16	jenifer	2016CI10256	James Kornell	petition.pdf | 1 MB Filing.pdf | Stamped__1 MB Filing.pdf | Stamped__petition.pdf | Stamped__petition.pdf | Stamped__1 MB Filing.pdf |	Sent
10/11/16			Jenifer Malik	criminal 1.pdf | criminal 2.pdf |	Error
10/11/16	Mary		Karem Jones	5 Pages Searchable.pdf |	Sent
10/11/16		20161025	Jenifer Malik	1 MB Filing.pdf | 5 Pages Searchable.pdf | Stamped__5 Pages Searchable.pdf | Stamped__1 MB Filing.pdf |	Sent
10/11/16	jenifer	2016CI10256	James Kornell	2.5 MB Filing.pdf |	Sent
10/11/16		D-16-2016-55-2	Jenifer Malik	rosy criminial.pdf | Stamped__rosy criminial.pdf |	Sent
10/11/16		42387-2016	Karen Vogh	Fillable Request Process Form.pdf | 2.5 MB Filing.pdf | Stamped__Fillable Request Process Form.pdf | Stamped__2.5 MB Filing.pdf |	Error
10/13/16			Jenifer malik	(1)One.pdf |	Error
10/17/16	Mary	123456	Karem Jones	5 Pages Searchable.pdf | Stamped__5 Pages Searchable.pdf |	Sent
10/13/16			Cosby Code	(3)Three.pdf |	Sent

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 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.

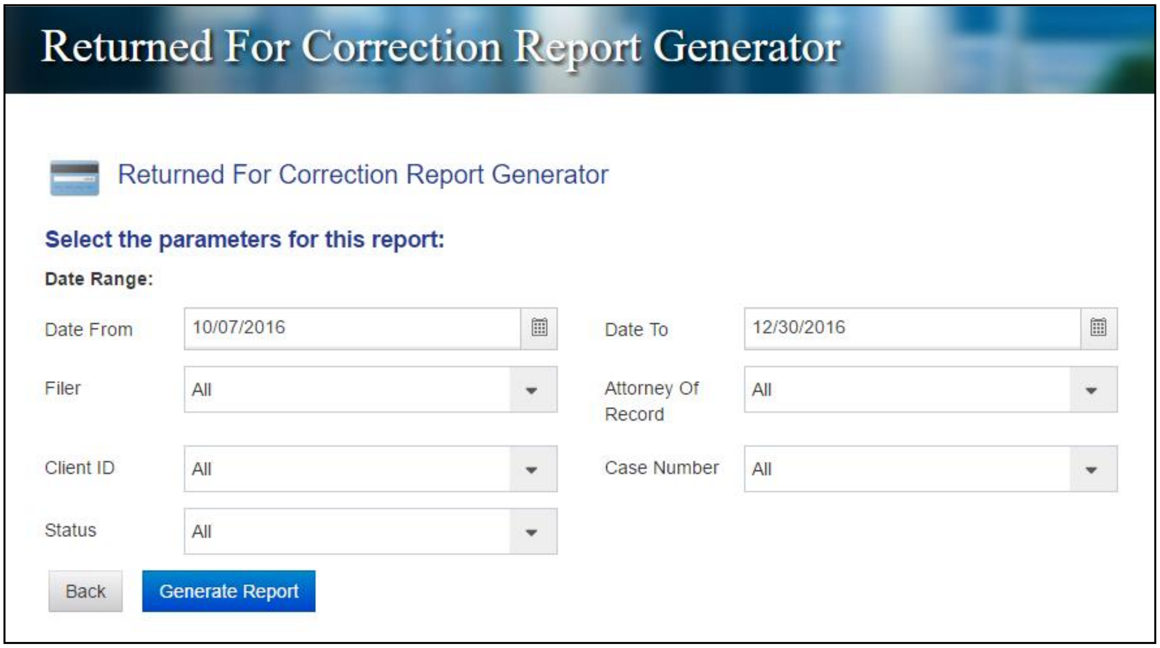
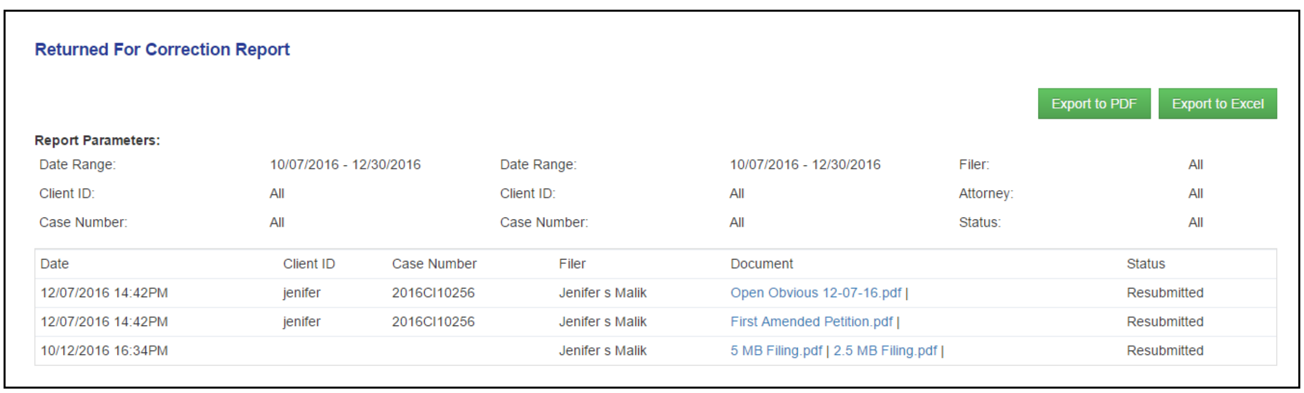


Figure 24, Returned for Correction Report Generator

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**.



Returned For Correction Report

Export to PDF Export to Excel

Report Parameters:

Date Range:	10/07/2016 - 12/30/2016	Date Range:	10/07/2016 - 12/30/2016	Filer:	All
Client ID:	All	Client ID:	All	Attorney:	All
Case Number:	All	Case Number:	All	Status:	All

Date	Client ID	Case Number	Filer	Document	Status
12/07/2016 14:42PM	jenifer	2016CI10256	Jenifer s Malik	Open Obvious 12-07-16.pdf |	Resubmitted
12/07/2016 14:42PM	jenifer	2016CI10256	Jenifer s Malik	First Amended Petition.pdf |	Resubmitted
10/12/2016 16:34PM			Jenifer s Malik	5 MB Filing.pdf | 2.5 MB Filing.pdf |	Resubmitted

Figure 25, Returned for Correction Report

B. Failed Filings

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

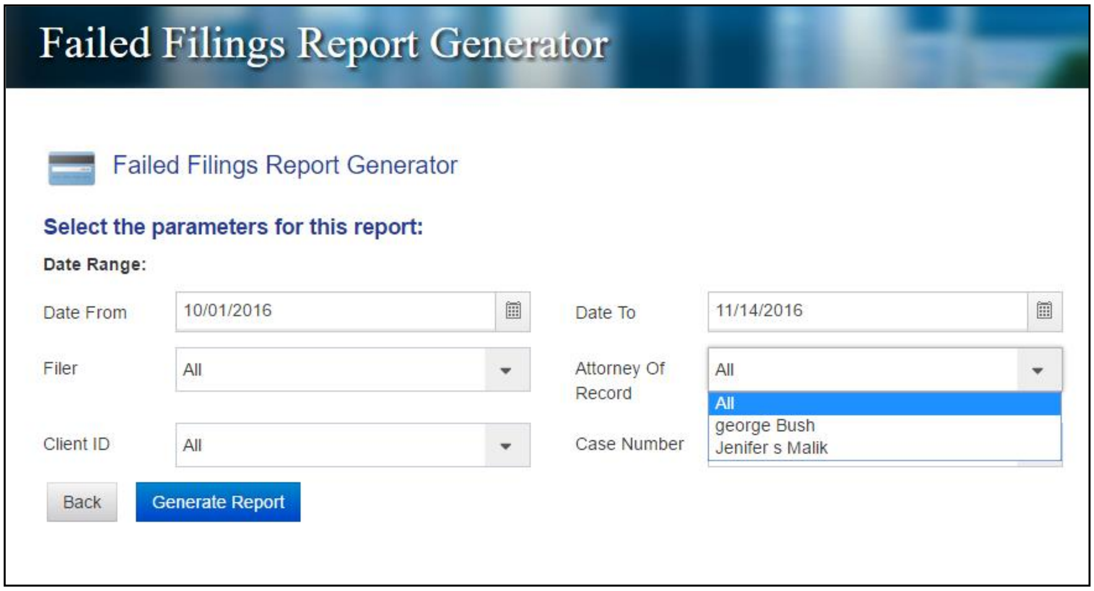
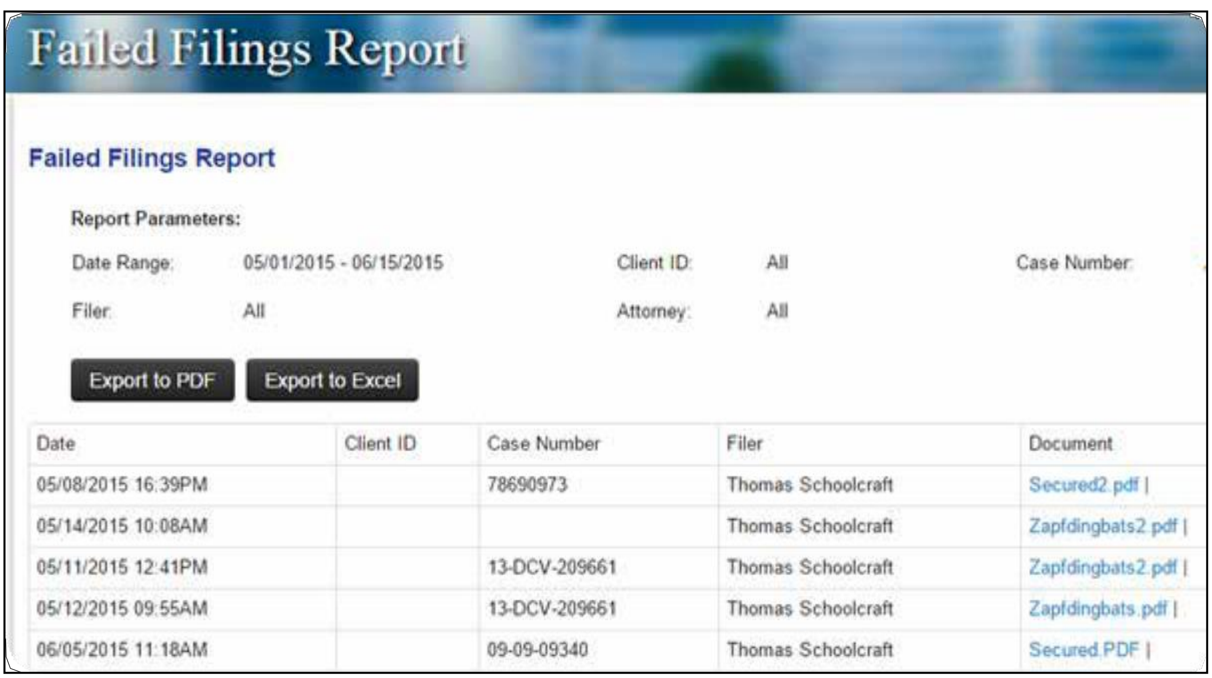


Figure 26, Failed Filings Report Generator

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



C. eService Failed

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

Please note that the Report 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.

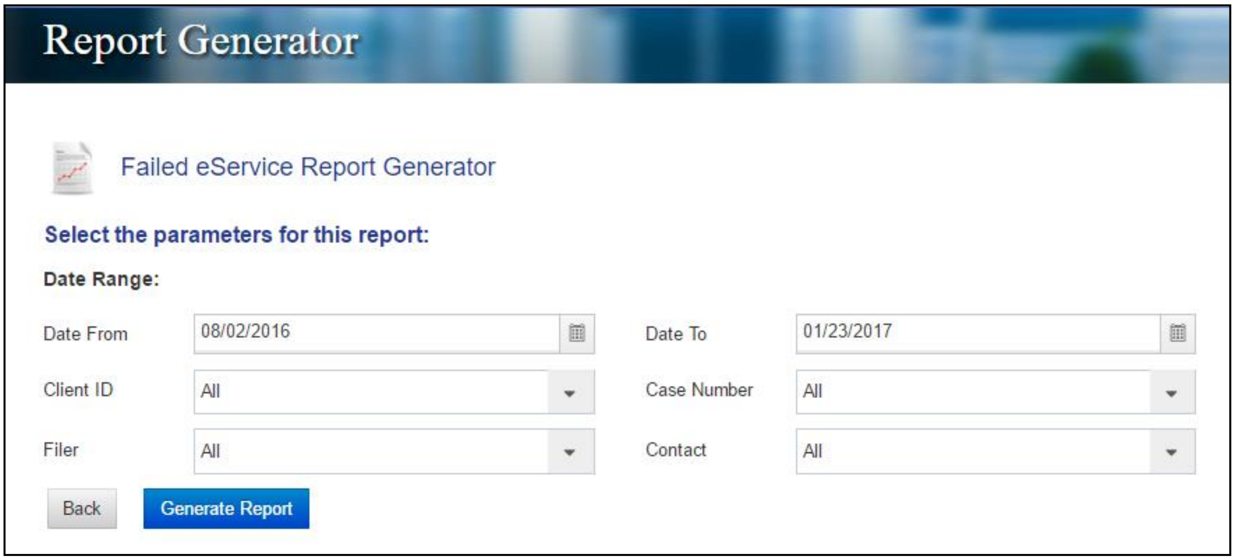


Figure 28, Failed eService Report Generator

Figure 29, 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.

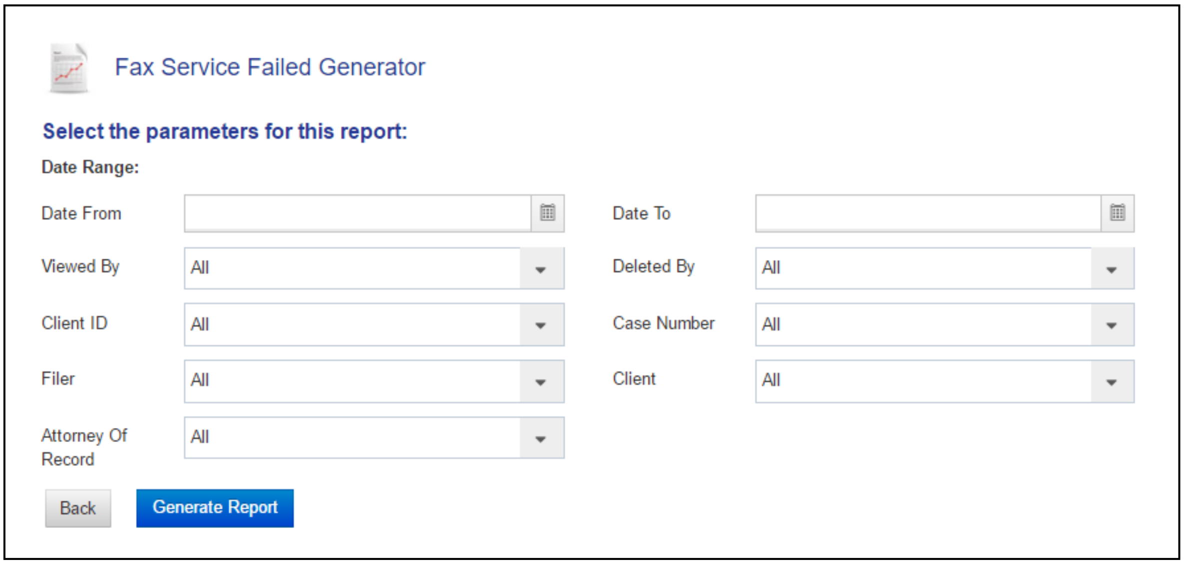
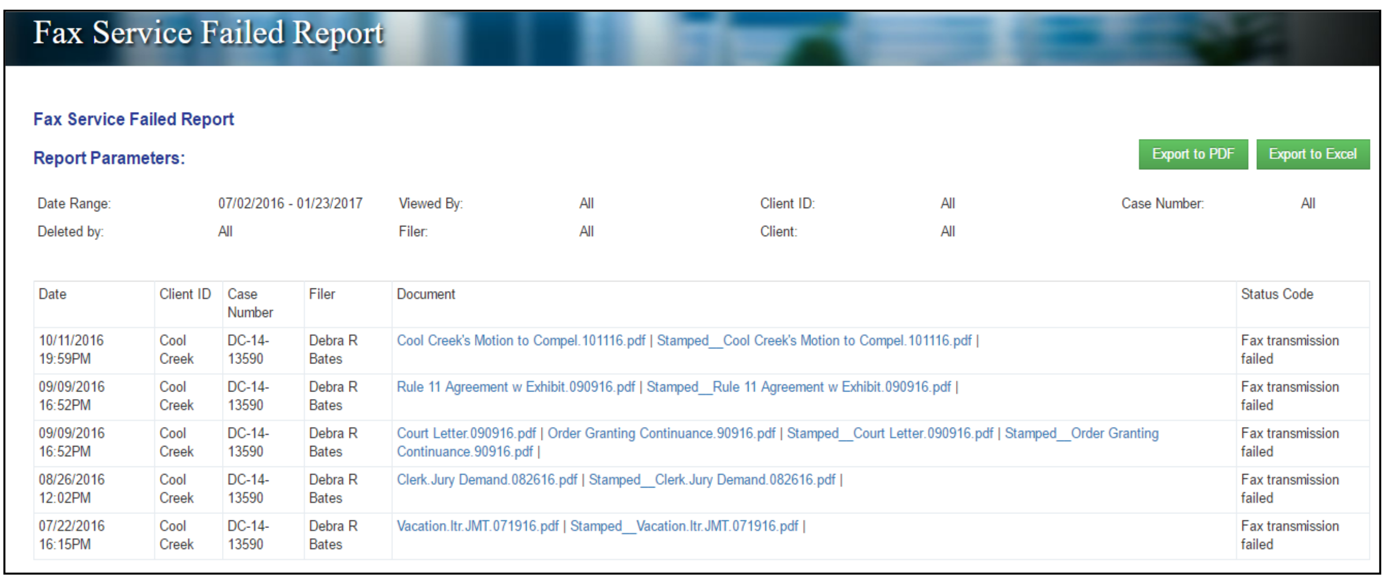


Figure 30, Failed Fax Service Report Generator

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


Fax Service Failed Report

Fax Service Failed Report

Report Parameters:

Export to PDF | Export to Excel

Date Range:	07/02/2016 - 01/23/2017	Viewed By:	All	Client ID:	All	Case Number:	All
Deleted by:	All	Filer:	All	Client:	All		

Date	Client ID	Case Number	Filer	Document	Status Code
10/11/2016 19:59PM	Cool Creek	DC-14-13590	Debra R Bates	Cool Creek's Motion to Compel.101116.pdf | Stamped__Cool Creek's Motion to Compel.101116.pdf |	Fax transmission failed
09/09/2016 16:52PM	Cool Creek	DC-14-13590	Debra R Bates	Rule 11 Agreement w Exhibit.090916.pdf | Stamped__Rule 11 Agreement w Exhibit.090916.pdf |	Fax transmission failed
09/09/2016 16:52PM	Cool Creek	DC-14-13590	Debra R Bates	Court Letter.090916.pdf | Order Granting Continuance.90916.pdf | Stamped__Court Letter.090916.pdf | Stamped__Order Granting Continuance.90916.pdf |	Fax transmission failed
08/26/2016 12:02PM	Cool Creek	DC-14-13590	Debra R Bates	Clerk.Jury Demand.082616.pdf | Stamped__Clerk.Jury Demand.082616.pdf |	Fax transmission failed
07/22/2016 16:15PM	Cool Creek	DC-14-13590	Debra R Bates	Vacation.ltr.JMT.071916.pdf | Stamped__Vacation.ltr.JMT.071916.pdf |	Fax transmission failed

Figure 31, Failed Fax Service Report