Odyssey

File & Serve Export

Odyssey®

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Publishing History

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Before You Begin

This document is intended to guide you in the process of exporting information from Odyssey File & Serve to validate billing records against what you have e-filed and for reconciliation of credit card statements. When using the export option in Odyssey File & Serve, data is exported to an XML file which can be opened by many different applications. To that end, documenting the process for all possible scenarios is not possible. If you have questions or need additional assistance with the export feature of File & Serve, Please call or email Tyler Technologies Technical Support.

Call: 800.297.5377

Email: efiling.support@tylertech.com

Selecting Records to Export

Once logged in to Odyssey File & Serve, from the 'My Filings' screen, change the selection to match the records you want to export. File & Serve provides the option to export only your filings, or those of your firm. To see all filings for your firm, change the Filings drop-down from 'My Filings' to 'My Firm'. You may also want to change the Status drop-down from 'All Statuses' to 'Accepted'. Narrow your search results further by entering dates in the 'From Date' and 'To Date' fields (i.e. 1/1/2012 to 1/31/2012 to view filings for January 2012, or whatever month/date range you are reconciling. The data to be exported is controlled by the filters used, so it is important to set the filters correctly. Once the filters have been applied, select the 'Filter' link and then choose the 'Export' link to export the data to XML.

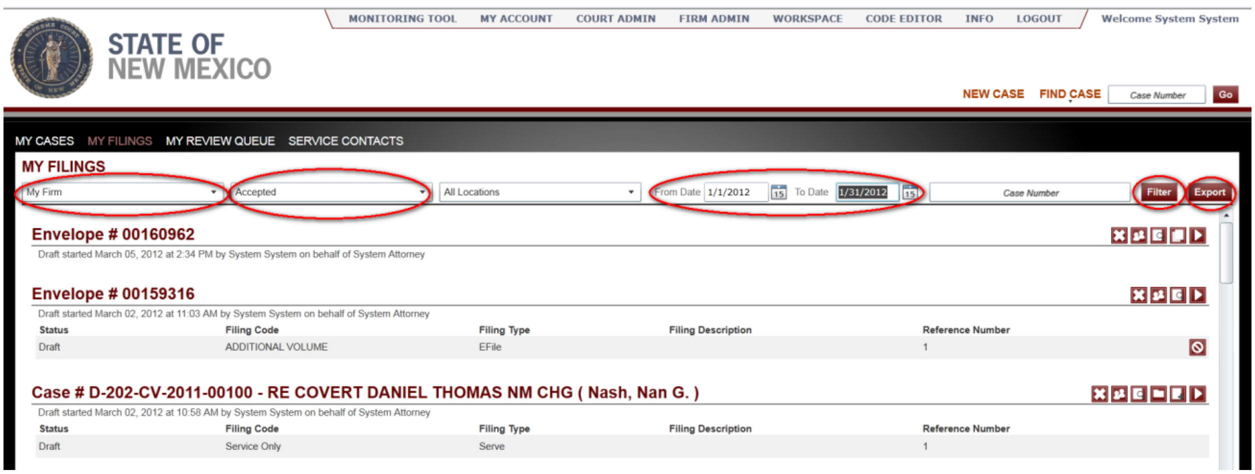

Figure 1 My Filings

Saving the Export File to Your Computer

After selecting the ‘Export’ option, you will be asked to save the XML file to your computer. Enter a name of your choosing for the export file and a location that is easily accessible (like the Desktop or My Documents folder) and choose ‘Save’.

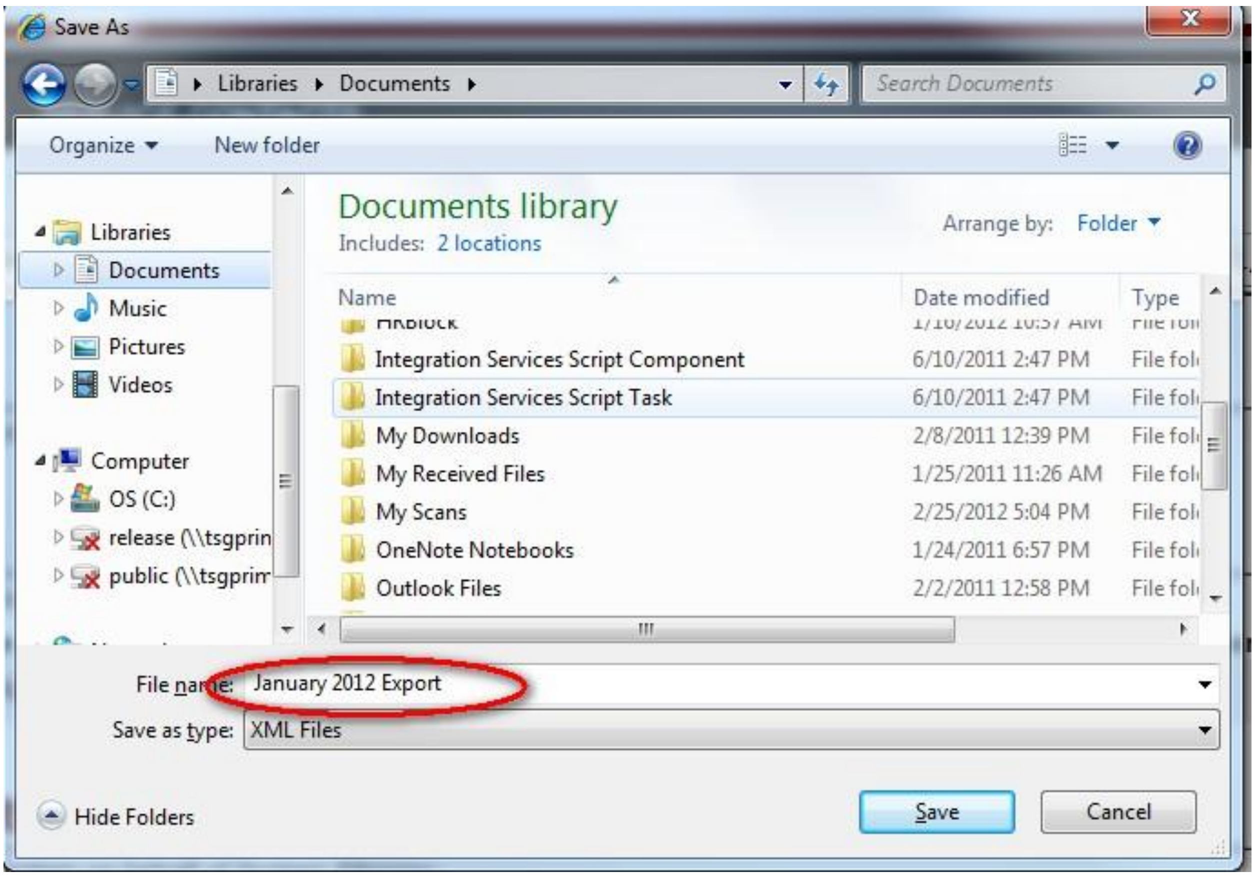

Figure 2 Saving the Export File

Viewing the Export File

Once the file has been exported, navigate to the location where the file was saved and open the file. Depending on what operating system (Windows or Mac) and programs installed on your computer, your options here will vary. If Microsoft Excel (or a similar application) is installed on your computer, using it is the simplest way to view the data.

When the XML file is opened, there will be two worksheets – one named Envelopes and one named Filings. Most users find the Envelopes worksheet easier to use for reconciliation of credit card statements, as the Filings worksheet will contain multiple rows of data for envelopes created with multiple filings. Currently, the Export contains the following fields in the Envelopes worksheet: Order ID, Case, Case Description (Case Style), Filed Date, Court Fee, Service Fee, Convenience Fee, Total Fee, Response, Capture Date, Accept Date, Account, Responsible Party, Envelope #, Reference Number.

Using Microsoft Excel (or a similar application) provides the ability to sort, filter, and total the data exported. Once the data has been sorted and filtered as appropriate, the 'Total Fee' column can be totaled using a formula. The Reference Number field is designed to be a way to link the client file in your office back to the e-filings created in File & Serve. When efiling a document and using the Reference Number in this manner, it will assist in assist in reconciliation of charges to client files.