



Odyssey CMS Cheatsheet

Topic: Batch Scanning with Barcodes
Updated: 11/20/2014

Summary: This will walk you through how to scan and attach documents to cases in Odyssey using the batch scanning process with individual event barcodes placed on each document. This can be accomplished utilizing events added individually to a case or by the group add events process. You will need a barcode printer and access to a scanner.

Important: Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

FROM A CASE –

1. Open your case and add the proper **event**.
2. When you **SAVE**, the event it will automatically print the barcode label for you to be placed on your document. (The Print Event Barcode Upon Save box should be checked by default.)

The screenshot shows the 'Add Event' form with the following fields and values:

- Type: Order Issued
- Date: 11/26/2014
- Order Signed: 11/26/2014
- Judicial Officer: (empty)
- Due: (empty) Completed: (empty)
- Comment: (empty)
- Volume: (empty) Page: (empty) # Pages: (empty)
- Docketable Include on Appeal
- Print Event Barcode Upon Save (indicated by a red arrow)
- Doc Link ID: (empty)
- Does not affect case aging clock

Buttons at the bottom: Save/Print, Save, Exit

3. Proceed to **STEP 8** below to begin the scanning process.

FROM GROUP ADD EVENTS -

1. Click on **“Group Add Events”** from the left menu bar.
2. Type in the **Case Number** of the case you wish to add a scanned document to.
3. Add the event type by selecting the option from the **Type** dropdown.
4. Complete any required additional fields.
5. Click **“Add”** button to start adding additional cases that have documents to be attached. The cases will display in a list on the bottom portion of the screen.



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Case #	Style	Event Type	Date
20D01-1410-CC-001291	CACH LLC vs. Haley Roscoe	Order Issued	11/26/2014
20D01-1410-CC-001290	CACH LLC vs. Donald Kovalski	Order Granting Motion to Dismiss	11/26/2014
20D01-1410-CC-001267	CACH LLC vs. Ignacio Gallegos	Order Granting Motion for Default Judgment	11/26/2014

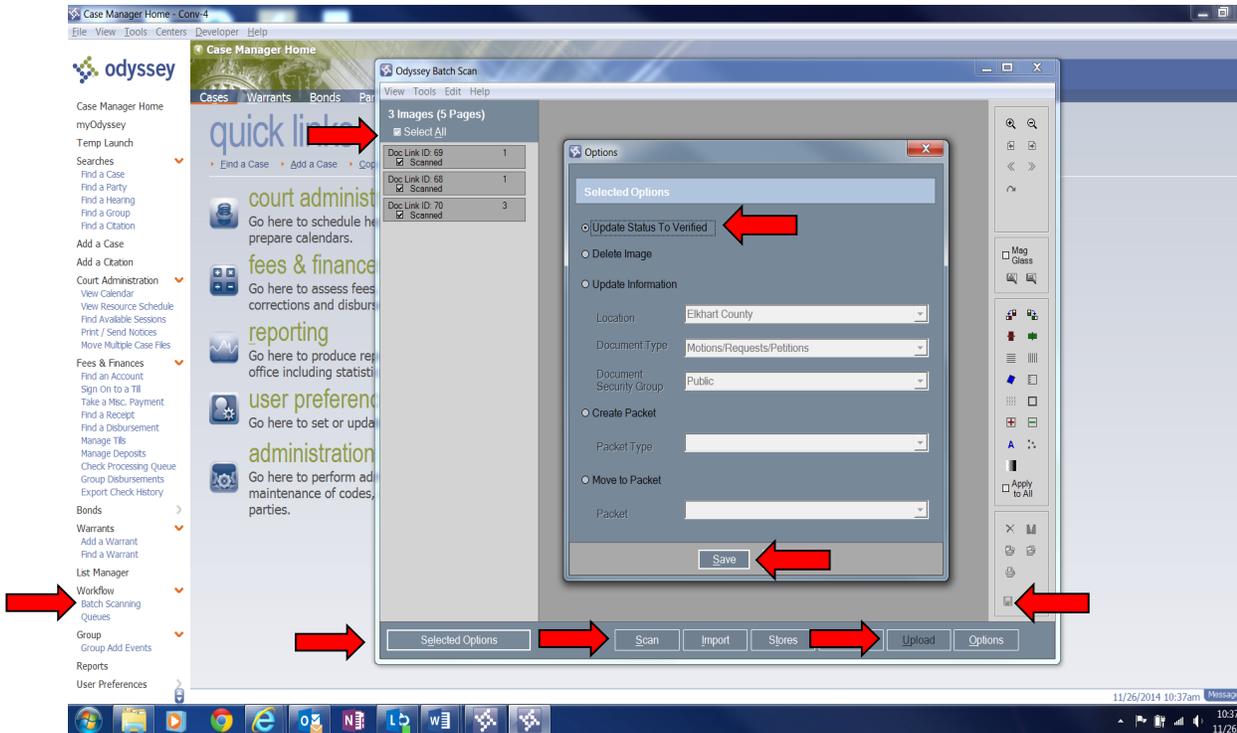
6. Click **“SAVE”** at the top right of the screen. Your barcodes will now be generated by the barcode printer.
7. Place the barcodes on the documents for each case. The barcode will be specific to each case and each case event.

SCANNING PROCESS

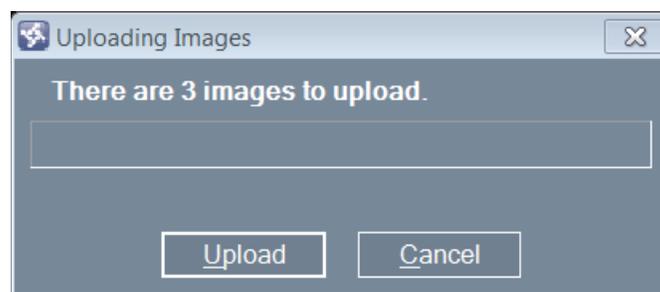
8. Place your items in your scanner.
9. Select **“Batch Scanning”** from the left navigation bar. The Odyssey Batch scan dialogue box appears.
10. Select **“Scan”** - Depending on configured options you may need to select your scanner from a pop up box.
11. Your documents should begin pulling through the scanner. On the left side of the viewer you will see the documents stacking up in individual blocks.



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12. Select each document and review it for any clean up. Use the clean-up tools on the right side of the screen to provide a variety of functions. NOTE: If you performed any clean up on a document be sure to save the individual documents using the clean-up tools save icon in the lower right.
13. After review and clean up click **"Select All"** or individually select the documents you wish to attach by clicking the check boxes next to each document.
14. Click **Selected Options** – The options dialogue box will appear.
15. The **Update Scan to Verified** radio button must be checked. Click **"Save"** in the options dialogue box.
16. Click **Upload** to begin the process. A dialogue box will appear -click **Upload** again. – Your barcode will know the document type, the event type and the case to attach the documents to.



17. The documents should now be attached and saved to each of your case event events.