



Odyssey CMS Cheatsheet

Topic: Case Index Report

Date: 5/8/2013

Summary: This report will produce an index of cases filed or disposed in your court for any date range.

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.

1. From the left navigation bar, choose **Reports** → **Case Management** → **Case Index**.



Enter the Following Search Criteria:

1. Locations (Required) – Select the locations for which the report is to be run by clicking on the picker to view the *Org Chart*.
2. Case Category (Required) – Select the case category(s) (Criminal, Civil, Family and/or Probate) that you want included in the report.
3. Case Types (Required) – Select the case types that should be included in the results.
 - a. Type “All” to include all case types.
 - b. To include only certain case types, click the picker icon to view a list of configured case types:

CM	Criminal Misdemeanor	JD	Juvenile Delinquency
FA	Class A Felony	JS	Juvenile Status
FB	Class B Felony	MC	Miscellaneous Criminal
FC	Class C Felony	MCPT	Miscellaneous, Probation Transfer In
FD	Class D Felony	MR	Murder
IF	Infractions	OE	Exempted Ordinance Violation
JC	Juvenile CHINS	OV	Local Ordinance Violation

4. Case Sub-Types (Optional) – Select the case sub-types that should be included in the results.
 - a. Type “All” to include all case sub-types.
 - b. To include only certain case sub-types, click on the picker icon to view a list of configured case sub-types based on selected case types. Uses the following matrix to select desired report options:

CPM	Capital Murder	PCH	Probable Cause: Arrest without warrant
DC	Direct Contempt	SW	Search Warrant
EP	Extradition Proceedings	SP	Special Prosecutor
FP	Forfeiture of property used in a crime	T	Truancy
LWOP	Life without parole		

5. Include Cases without sub-types (Optional) – Includes cases without sub-types in the report results.



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6. Date Range (Required) – Must select the start and end date for the desired report output:
 - a. Type the full date or date calculation into the text box.
 - b. Use the calendar icon to select the appropriate date.
7. Date Range Type (Required) – Click the dropdown arrow and select from the options listed:
 - a. Active Case Status Date – Includes cases where the case status is listed as “Pending” on your report. Click into the picker icon to select specific active status codes. If you would like all, type ALL.
 - b. File Date – This option will pull cases based off of the file date selected. Use this option if you want to know how many cases were filed in your court.
 - c. Inactive Case Status Date – Includes cases that are listed as “Decided” on your report. Use this if you would like to know how many cases are inactive/decided in your court. Click into the picker to select specific inactive status codes. If you would like all, click the “Select All” button or type ALL in the field.
 - d. Statistical Closure Date – Includes cases that have been statistically closed in your court. Use this option if you would like to know how many cases have been disposed of in your court. Click into the picker icon to select statistical closure. If you would like all, click the “Select All” button or type ALL.
8. Second Date Option (Required) – The options in this field vary depending on what was selected in the “Date Range Type” field.
 - a. If Active Case Status was selected, the options in this field are:
 - i. File Date will give you results from the current status of your date based off the file date.
 - ii. Statistical Closure Date will give you results from cases that are pending, but have at one time been statistically closed, such as cases that have been re-docketed.
 - b. If File Date was selected the options in this field are:
 - i. Active Case Status Date will give you results from cases that have a file date within the date range provided and also cases that have a case status of “Pending”.
 - ii. Current Case Status Date will give you results from cases that have a file date within the date range provided and also cases with the current case status date (pending or decided).
 - iii. Inactive Case Status Date will give you results from cases that have a file date within the date range provided and also cases that have a case status of “Decided”.
 - iv. Statistical Closure Date will give you results from cases that have a file date within the date range provided and also cases that have been statistically closed.
 - c. If Inactive Case Status Date was selected, the options in this field are:
 - i. File Date will give you results of cases that are inactive or decided and also pull the date of when the case was filed.
 - ii. Statistical Closure Date will give you results of cases that are inactive or decided and also pull the date of when the case was statistically closed.
 - d. If Statistical Closure Date was selected, the options in this field are:
 - i. Active Case Status Date will give you results of cases that have been statistically closed and with a case status of pending. (Example, case that have been re-docketed).
 - ii. Current Case Status Date will give you results of cases that have been statistically closed and whatever the current case status of the case is.
 - iii. File Date will give you results of cases that have been statistically closed and also what the file date of the case is.
 - iv. Inactive Case Status Date will give you results of cases that have been statistically closed and have a case status of “decided”.
9. Judicial Officers (Optional) – You can select judicial officers whose cases are desired for report output.
 - a. Type “All” to include all judicial officers.
 - b. Use the picker icon to select specific judicial officers.
10. Include Unassigned Cases (Optional) – Includes amended cases that have no judicial officer assigned.



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11. Event Type (Optional) – Select events to filter desired report output with one of the following options:
 - a. Type “All” to include all statuses.
 - b. Use the picker icon to access a search box to select the appropriate event types.
12. Event Date Range (Optional) – Select the start and end date for the event date.
 - a. Type the full date or date calculation into the text box.
 - b. Use the calendar icon to select the appropriate date.
13. Sort Order (Required) – Select from the dropdown as to how you would like your report to be sorted.
 - a. Case Number – Sorts the report by case number order.
 - b. Case Number (additional required field) – Party Name will sort the report first by case number order and then by party name. If you chose this option you will need to click into the picker next to the box below the sort order field and select what parties you want to sort by.
 - c. Case Type, then by Case Number – Sorts by case type and then by case number. (Example all CC would be in a section then in that section in case number order).
 - d. Party (additional required field) – If you chose this option you will need to click into the picker next to the box below the sort order field and select what parties you want to sort by.
 - e. Party, then by Case Number (additional required field) – Sorts first by party, and then by case number. If you chose this option you will need to click into the picker next to the box below the sort order field and select what parties you want to sort by.
14. Report Options – In this section are options that you can have included in your report.
 - a. Include Summary – You can only mark this option with the sort order of: Case Type, then Case number; Case Type, then File Date; OR File Date. This will break out the summary on a separate page.
 - b. Include Subtotals – If you choose more than one court, the subtotal after each court would be listed.
 - c. Include Judicial Officer Name – This will show Judge’s name at the end of the report.
 - d. Include Attorney Name – Lists attorneys that have been added for each individual case.
 - e. Include Last Event/Event Date – Lists the title and date of the last event added to each case.
 - f. Include Volume/Page Information from Events – Lists the volume/page information, if applicable.
 - g. Include Date of Birth/ Date of Death – If this information has been added to the party record, this information will pull on the report if this is check marked.
 - h. Include Inactive Parties – If a party has been made inactive, it will show on the report if this option is check marked.
15. Grouping Options
 - a. Do Not Group by Location – If you do not want cases grouped by location (if you choose more than one court), it will mix the courts all together.
 - b. Group by Case Category – This will group your report by Case Category.
 - c. Group by Judicial Officer – When more than one Judge is selected, you can group by Judicial Officer.
16. Security Group (Optional) – If your court deals with confidential cases or any of your cases you would like to produce a list of are in a security group you will need to add those groups in this field:
 - a. Type the word “All” in the field.
 - b. Click into the picker and select the security groups you need.
17. Internal or Public Report (Required) – Select Public or Internal depending on who will be using this report.
18. Save as CSV (Optional) – Check mark if you would like the ability to open this report in Microsoft Excel.
19. List Name (Optional) – You may choose to enter a name into the text box. If a name is entered, the list that is output by the report will be saved to *List Manager* and can later be recalled via *List Manager*.



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Case Index Schedule Submit

Produce an index of cases filed or disposed in your office or court for any date range.

Clear Memorize Recall

Locations:

Case Category:

Case Type:

Case Subtypes:

Include Cases Without a Subtype

Date Range: Start Date: Tuesday, January 1, 2013
End Date: Friday, March 1, 2013

Date Range Type:

Second Date Option:

Judicial Officer:

Include Unassigned Cases

Event Type:

Event Date Range: Start Date: End Date:

Sort Order:

Report Options: Include Summary
 Include Subtotals
 Include Judicial Officer Name
 Include Attorney Name
 Include Last Event/Event Date
 Include Volume/Page Information from Events
 Include Date of Birth / Date of Death
 Include Inactive Parties

Grouping Options: Do Not Group by Location
 Group by Case Category
 Group by Judicial Officer

Security Group:

Internal or Public Report:

Save as CSV

List Name:

If this list name already exists for your user-id, the results of this report will overwrite the existing list.



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20. Click **Submit** and enter the email addresses of the desired recipients. Be sure the place a check mark next to "Attach Any Files Generated by Job and Keep Files in Job History". Then, click **Finish**.

The screenshot shows a dialog box titled "Add Email Notification Recipients". It has several input fields and checkboxes. The "To" field is filled with "jtaylor@jtac.in.gov". Below it are empty fields for "Cc" and "Bcc". The "Comment" field contains "Case Index". There are three checkboxes: "Attach Any Files Generated by Job" (unchecked), "Attach Any Files Generated by Job and Keep Files in Job History" (checked), and "Copy Job Files to Directory" (unchecked). Below these are fields for "Directory" and "Printer". At the bottom, there are "Cancel" and "Finish" buttons.

Results

Content

Only results matching the search criteria are shown. In the picture is listing of cases that have been filed within a specific date range.

Display (see Screenshot below)

Results are listed in a grid including the columns listed below. The top section will show selected search criteria. Results will be organized based on the sort options selected during the search criteria section.

1. File Date
2. Style
3. Case Type/Case Subtype
4. Case Number
5. Case Status Date/ Active Case Status
6. The last page (shown) shows the Subtotal for the court, and also the grand total.

Case Index

INSU PRE ME QA

Version: Public Filed Date: 01/01/2013 to 03/01/2013 Sorted By: File Date

Grant Superior Court 3

03/01/2013	Deca Financial Serv LLC As Agt for Collections for Emergency Medicine of Ind PC vs. Gregory West	SC - Small Claims	27D03-1303-SC-000323	03/01/2013 Pending
03/01/2013	Deca Financial Serv LLC As Agt for Collections for Emergency Medicine of Ind PC vs. Courtney Williams	SC - Small Claims	27D03-1303-SC-000324	03/01/2013 Pending
03/01/2013		SC - Small Claims	27D03-1303-SC-000325	03/01/2013 Pending
03/01/2013	Russell Humphries vs. Blakleigh Draper	SC - Small Claims	27D03-1303-SC-000326	03/01/2013 Pending
03/01/2013	John Buchanan,Diane Buchanan vs. Charlie Scaife,Tonya Scaife	SC - Small Claims	27D03-1303-SC-000327	03/01/2013 Pending

Total Grant Superior Court 3: 396

Grand Total: 396