



Odyssey CMS Cheatsheet

Topic: Creating and Scheduling Event Follow Up Report

Date: 5/1/2013

Summary: This report will produce a list of cases for which there are events that are scheduled to be reviewed for a particular date range.

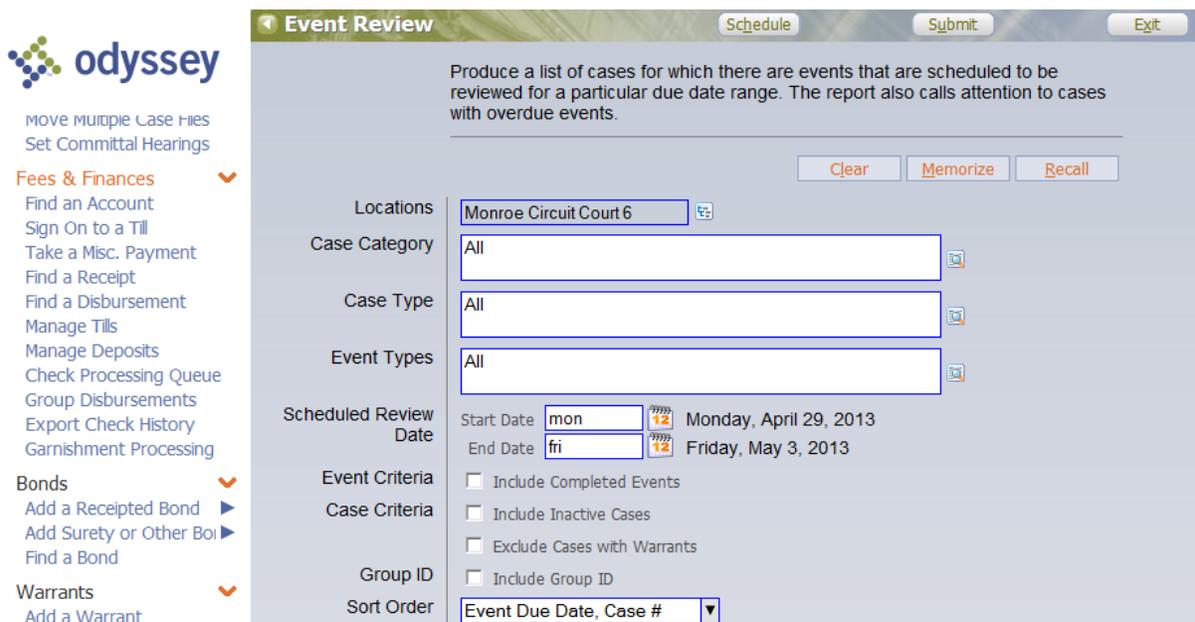
Important: Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

1. Go to *Reports* → *Case Management* → *Event Review*.



2. Complete the following fields:

- **Locations:** Choose your court from the picker box.
- **Case Category:** Type "All" in the box, or select all from the picker box.
- **Case Type:** Type "All" in the box, or select all from the picker box.
- **Event Types:** Type "All" in the box, or select all from the picker box.
- **Start Date:** Enter the beginning of your desired date range.
- **End Date:** Enter the end of your desired date range.
- **Sort Order:** Choose a sort order. (Event Due Date, Case # is suggested)

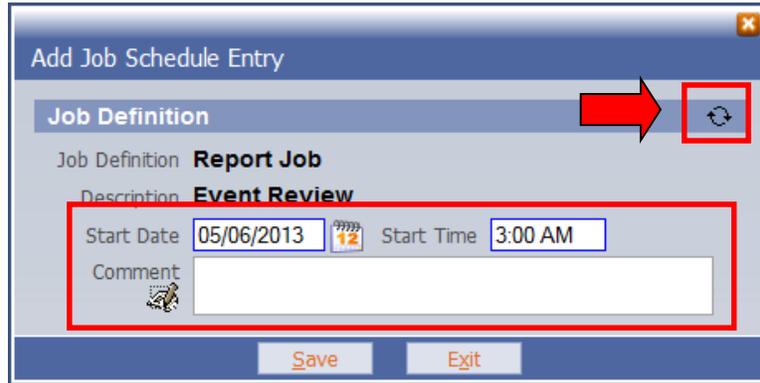


3. Click **Schedule** at the top of the page.



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4. Enter the **Start Date** and **Start Time**. This is the day and time the report will run and be sent.
5. Enter a brief description in the **comment** field of what the report includes: e.g. follow up, taken under advisement, etc. and briefly reference the recipients.
6. Click the **Recurring**  icon.



Add Job Schedule Entry

Job Definition

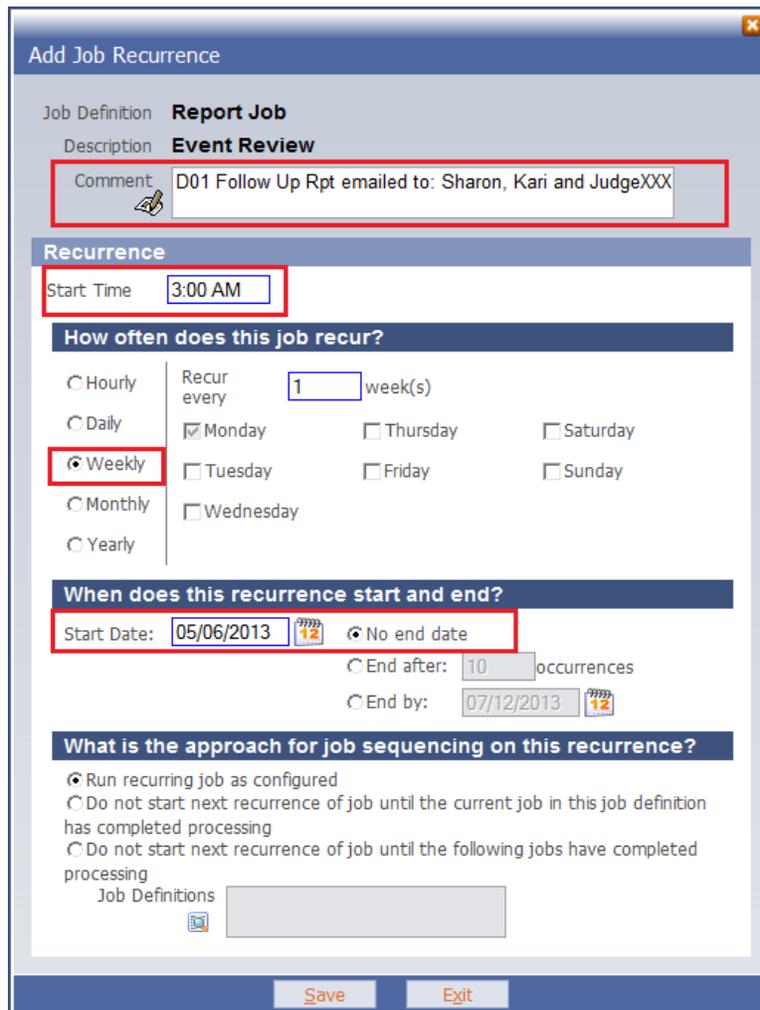
Job Definition **Report Job**

Description **Event Review**

Start Date Start Time

Comment

7. Specify how **often** you want the report to recur, the **start** of the recurrence, and the **end** of the recurrence (suggested – running this during off hours).



Add Job Recurrence

Job Definition **Report Job**

Description **Event Review**

Comment

Recurrence

Start Time

How often does this job recur?

Hourly Recur every week(s)

Daily Monday Thursday Saturday

Weekly Tuesday Friday Sunday

Monthly Wednesday

Yearly

When does this recurrence start and end?

Start Date: No end date

End after: occurrences

End by:

What is the approach for job sequencing on this recurrence?

Run recurring job as configured

Do not start next recurrence of job until the current job in this job definition has completed processing

Do not start next recurrence of job until the following jobs have completed processing

Job Definitions



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Note: The comment fields help the Court Technology Help Desk locate the correct report when you need to cancel or update an existing scheduled report. If you need to make updates or cancel a scheduled report, you can also forward the original email that you receive. It has job ID number and other pertinent information that helps us to locate the exact scheduled job that you previously setup.

- Click **Save**.
- Add the list of users who the report should be emailed to.
- Check the **Attach any Files Generated by Job AND Keep Files in Job History**. (The 2nd check box)

The screenshot shows a dialog box titled "Add Email Notification Recipients". It has a close button (X) in the top right corner. The fields are as follows:

- To:** JDewitt@jtac.in.gov
- Cc:** (empty)
- Bcc:** (empty)
- Comment:** Event Review Report - Test
- Attach Any Files Generated by Job
- Attach Any Files Generated by Job and Keep Files in Job History
- Copy Job Files to Directory
- Directory:** (empty text box)
- Print to Network Printer
- Printer:** (empty dropdown menu)

At the bottom, there are two buttons: "Cancel" and "Finish". The "Finish" button is highlighted with a red box.

- Click **Finish**.