



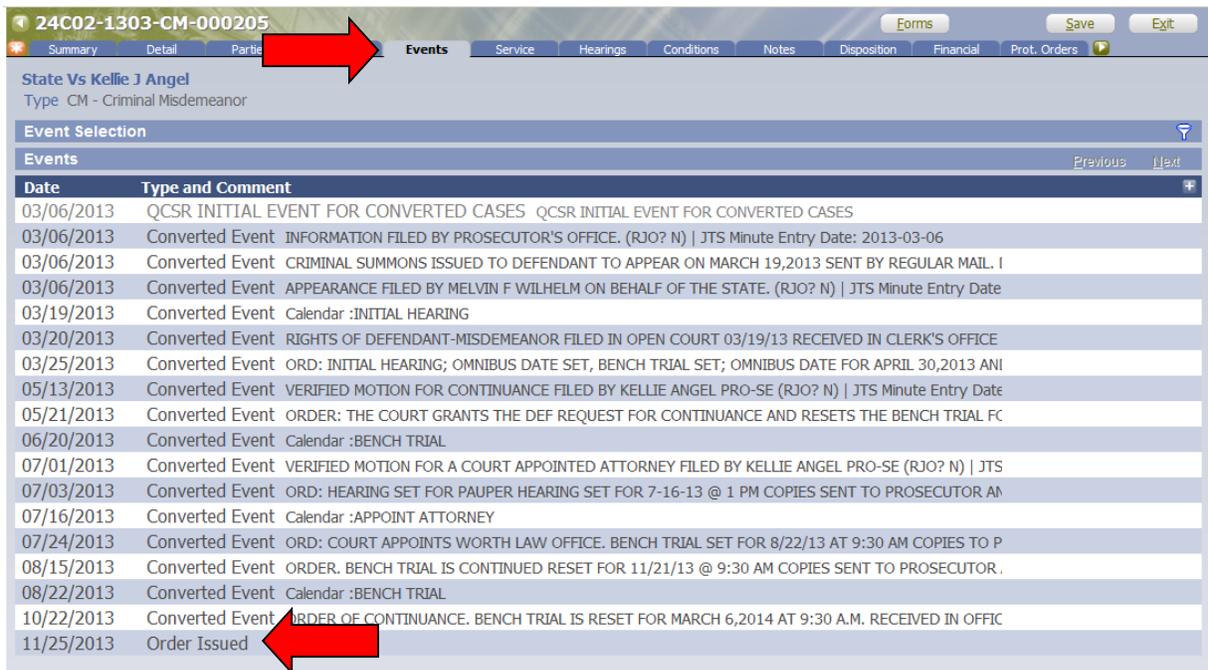
Odyssey CMS Cheatsheet

Topic: Scanning, Relating, Removing and Attaching Documents in Odyssey
Updated: 1/15/2016

Summary: This will walk you through how to scan or attach a document to a case in Odyssey.

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. You can scan or attach a document from a few different places on a case, but the easiest way is to scan from the Events tab. Once the event has been added to Odyssey, right click on the event and select **Scan Document**. This will attach the document to the specific event.



2. Select the **Document Type**. (Note: This list could be changed or more could be added).

Note: The document type is defaulted for every event. While users have the ability to change these, it's strongly recommended to leave the defaults. The document types are important for a few reasons:

- A document type of **Order** or **RJO Entry**, as long as the document security is Public, will display on public access.

The screenshot shows the 'Add New Image' dialog box. The 'Type' dropdown is set to 'RJO Entry' and the 'Security Group' dropdown is set to 'Public'. The 'Description' field is empty. The 'Scan', 'Config', and 'Exit' buttons are visible at the bottom.

The screenshot shows the 'Add New Image' dialog box. The 'Type' dropdown is set to 'Order' and the 'Security Group' dropdown is set to 'Public'. The 'Description' field is empty. The 'Scan', 'Config', and 'Exit' buttons are visible at the bottom.



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- A document type of **No Contact Order** will NOT display on public access. Although we are not displaying Orders on public access today, there are on-going discussions to make all Court Orders available on public access. When scanning a no contact order or a protective order, it's very important to scan it to one of the 7 events below. Be sure to leave the document type as **No Contact Order**. The No Contact Order is defaulted as the document type for the following events:
 - ARJEXPRO – Ex Parte Order for Protection Issued
 - ADMFPOR – Foreign Protection Order Registered
 - ARJNCO – No Contact Order Issued
 - OPO – Permanent Order for Protection Issued
 - ARJWVO – Workplace Violence Order Issued
 - OTCP – Temporary Child Protection Order Issued
 - OPCP – Permanent Child Protection Order Issued

Add New Image

Type: No Contact Order

Security Group: Public

Description: [Empty]

Buttons: Scan, Config, Exit

3. Select the **Security Group**. (Note: If it is a confidential document, you'll need to select the **Confidential** security group to ensure only those who have access to the confidential documents can see these. A document should only be marked confidential when the judge determines it to be confidential, the case security should not matter. For instance, if a document is scanned on a juvenile case type, it should be marked as confidential only if the judge determines it. It should not be marked confidential simply because the case is confidential.)

Add New Image

Type: Order

Security Group: Public

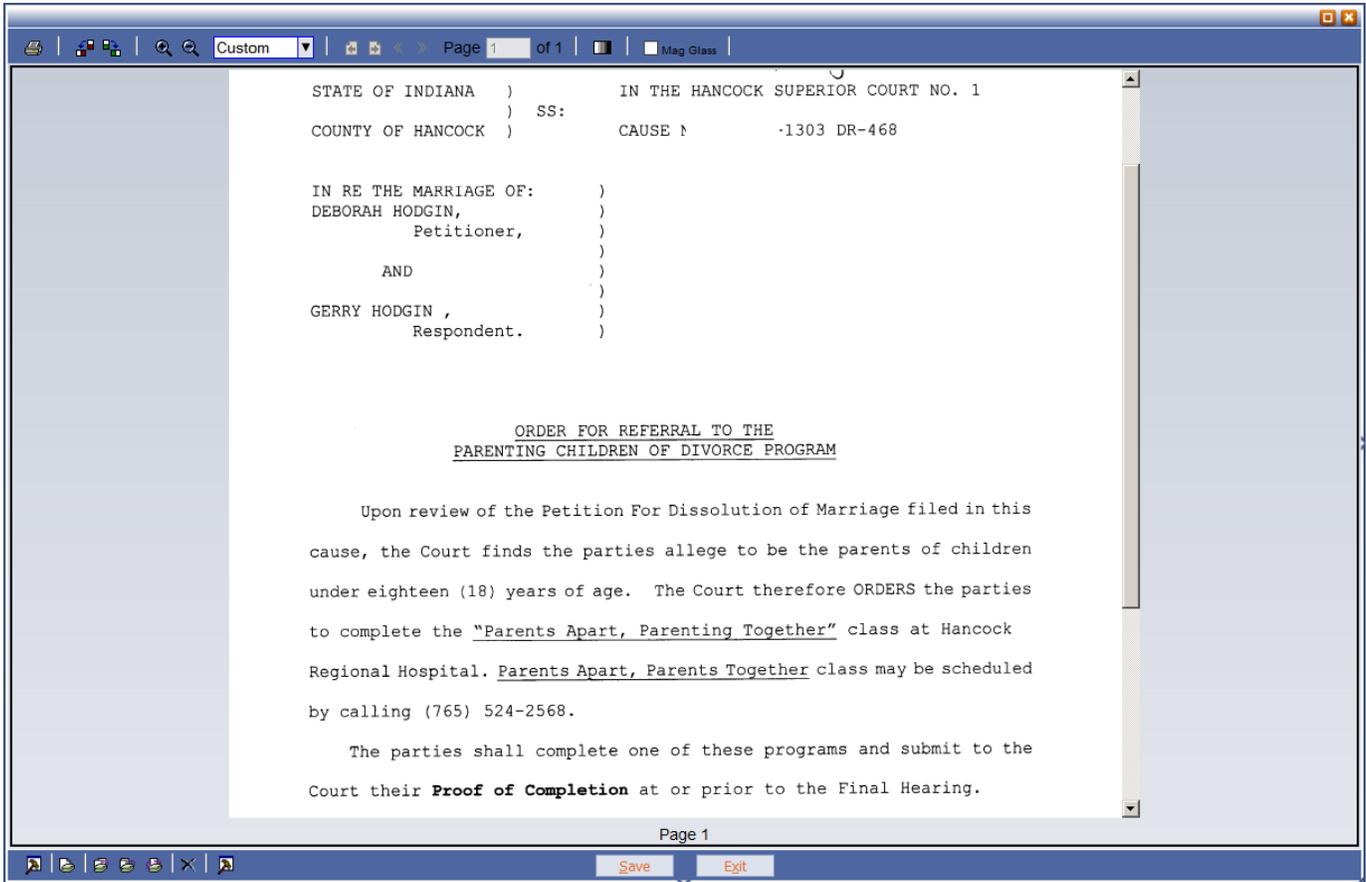
Description: Confidential, Public

Buttons: Scan, Config, Exit

4. Now click **Scan**. The document should scan and show a preview of the image. There are several options that are available, such as rotating, zoom in, zoom out.



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5. If the document looks ok, click **Save**.
6. The document should now be attached to the event on the case. You can also access this from the Documents tab on the case.

Removing (Obsoleting) a Document from a Case

1. A document can also be removed from a case if it was added in error. This can only be done on the Documents tab in Odyssey. In the list of documents, click on the line of the document you wish to remove and click obsolete from the drop-down list. This will remove the document.





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2. You can re-add a document that was obsoleted by making sure the checkbox “show obsoleted documents” is checked. This will now display all the obsoleted documents on the case. If you need to re-add a document, right click on the line of the document, click modify document, remove the obsoleted date and click save. This will re-populate the document to the list.

The screenshot shows the Odyssey CMS interface for case 13C01-1510-CM-000406. The 'Documents' tab is active, displaying a table with one document: Doc ID 10/14/2015, Type Miscellaneous, Name Case Opened as a New Filing. A 'Modify Document' dialog box is open, showing fields for Name, Type, Security Group, Description, Effective Date (10/14/2015), and Obsolete Date. A red arrow points to the 'Obsolete Date' field, indicating it should be removed.

Relating a Document to an Event

3. A document can also be related to other events. For instance, if a complaint and an appearance was scanned as one document and attached to the Complaint filed event, you can relate this same document to the Appearance Filed event, without having to scan it again.
4. Right click on the event you want to relate a document to.
5. Select Relate Document.

The screenshot shows the Odyssey CMS interface for case 24C02-1303-CM-000205. The 'Events' tab is active, displaying a table with two events: 03/13/2014 Order Issued BENCH TRIAL RESET. COPIES TO PROSECUTOR AND JIM MOORE ON 3/13/14. RECEIVED ON 3/10/14. and 03/13/2014 Notice Issued to Parties TO JIM MOORE AND PROSECUTOR ALONG WITH ORDER ON 3/13/14. A context menu is open over the second event, with 'Relate Documents' selected.

6. Select the document you want to relate. This screen will only show the documents that are on the documents tab of the case.



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Date	Document Type	Document Name	Pgs	
<input checked="" type="checkbox"/>	01/07/2014	Miscellaneous	Appearance Filed	1
<input type="checkbox"/>	03/06/2013	Converted Document	Appearance Filed By State Of Indiana	1
<input type="checkbox"/>	07/24/2013	Converted Document	Appointment Of Counsel	1
<input type="checkbox"/>	03/06/2013	Converted Document	Criminal Summons	1
<input type="checkbox"/>	03/06/2013	Converted Document	Information Filed By Prosecutor's Office	4
<input type="checkbox"/>	03/25/2013	Converted Document	Ord: Initial Hearing; Omnibus Date; Bench	1
<input type="checkbox"/>	03/13/2014	Order	Order Issued	1
<input type="checkbox"/>	10/22/2013	Converted Document	Order Of Continuance	1
<input type="checkbox"/>	08/15/2013	Converted Document	Order Of Continuance	1

7. Select the document you want to relate. This screen will only show the documents that are on the documents tab of the case.
8. Click Save.
9. If you need to "Un-Relate" the document from the event, right click the event and select Relate Document. It will bring you to the screen above. Uncheck the document.

Attaching a Document (One that has already been scanned)

1. If you need to attach an existing electronic document to a case, then follow the same steps above. On step #1, click **Attach Document**.
2. Select the **Document Type**, the select the **Security Group**.

Name: Order Issued
Type: Order
Security Group: Public
Description:
Effective Date: 11/25/2013
Obsolete Date:
Buttons: Attach, Scan, Exit

3. Click **Attach**.



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4. Navigate to the folder where the scanned documents are. Select the document and click **Open**.
5. The document should now be attached to the case.

Converting Files from TIFF to PDF

Note: As of 8/1/15 any document scanned in Odyssey will automatically be converted to a PDF. For documents scanned prior to 8/1/15 or if a document fails to convert to a PDF you can use the following instructions to manually convert the document from a TIFF to a PDF.

1. Navigate to the case.
2. Right-click on the document from the Documents tab.
3. Select **Perform OCR**.

The screenshot shows the Odyssey CMS interface for case 20D03-1505-CM-000791. The case title is "State of Indiana vs. TERRANCE L. UNDERWOOD" and the type is "CM - Criminal Misdemeanor". The "Documents" tab is active, displaying a list of documents. A context menu is open over the document "Order on Initial Hearing", with the "Perform OCR" option selected.

Doc	Date	Type	Name	Pgs	Mark
	05/14/2015	Miscellaneous	Bond Form Filed	3	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/03/2015	Motions/Requests/Petitions	Motion to Consolidate Filed	2	x
	06/03/2015		Order Granting Motion to Consolidate	1	x
	05/12/2015		Order on Initial Hearing	1	x