



Odyssey CMS Cheatsheet

Topic: List Manager
Date: 1/8/2015

Summary: List Manager is a way to process cases in batch. It allows you to perform several actions to a list of cases or hearings simultaneously.

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.

You can create two types of lists – a Case List and a Hearings List. Only certain types of actions can be performed for each list type. If you want to perform an action for list that is not available for that list type you can *convert* the list. (See *Managing or Modifying a List* below.)

Actions to perform with a list of cases:

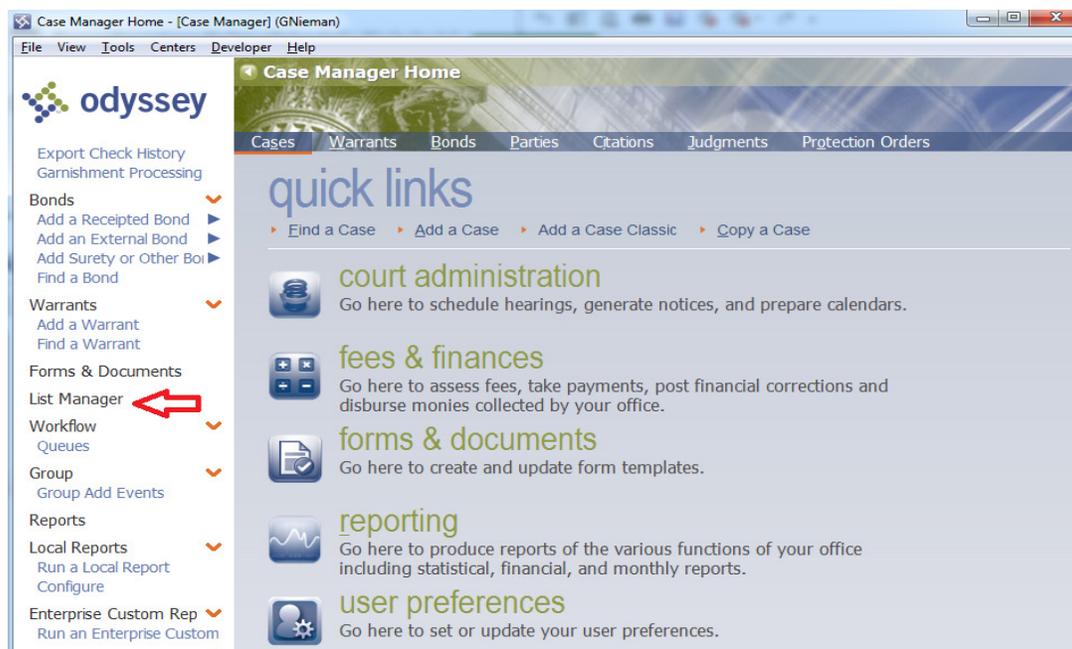
- Add Attorney
- Assess Fees and Fines
- Batch Notices
- Batch Print Case Labels
- Case Reassign Judge
- Case Reassign Judicial Officer and Location
- Case Reassign Location
- Generate Criminal Case Warrants
- Pay / Appear Past Due Batch Notices
- Print Case Form
- Print Case Summaries (CCS's)
- Schedule Hearings
- Update Cases
- Update Dispositions
- Update Warrant Status
- View Next Hearing Date

Actions to perform with a list of hearings:

- Print Rescheduled Hearing Notices

To Create a List with List Manager (Perform Query):

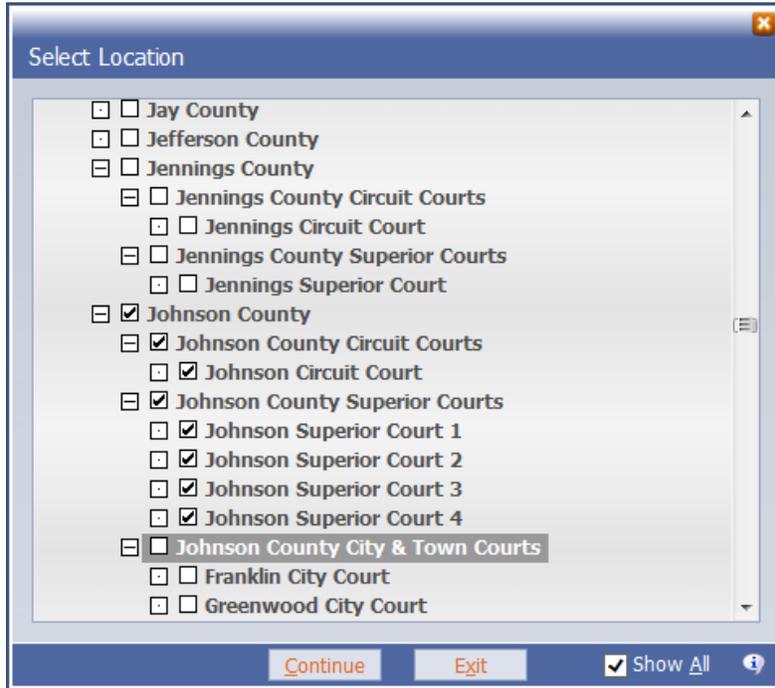
1. Select List Manager on the right navigation bar within Odyssey.





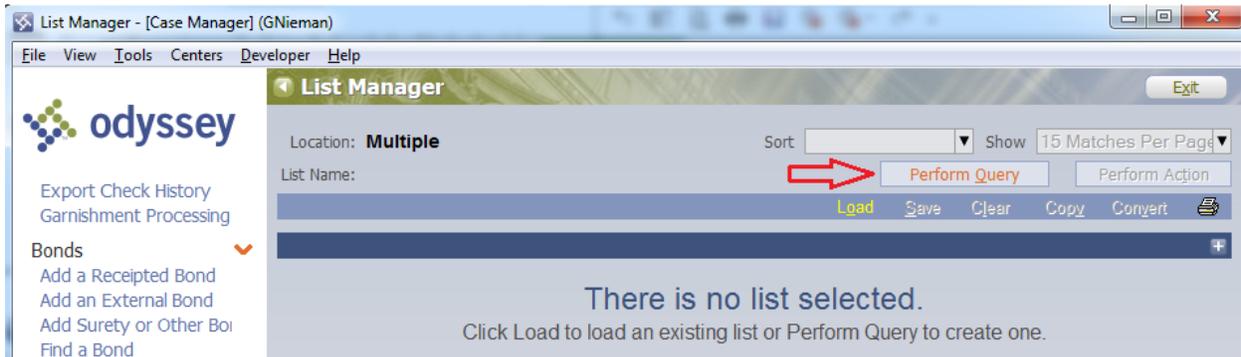
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2. Select your county node and all court nodes below it, if applicable. (Deselect the city/town nodes unless applicable). Click Continue.

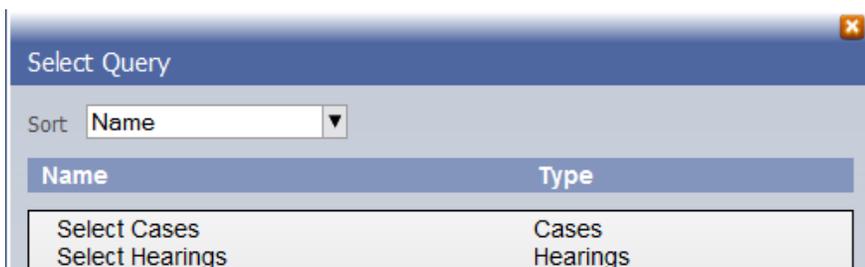


3. Create a List:

- o Select *Perform Query* (upper right of screen).



- o Select hearings or cases in the dialog box.
 - Choose *Select Cases* in order to select criteria for creating a list of cases.
 - Choose *Select Hearings* in order to select criteria for a list of hearings.





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- Complete the rest of the “Select Hearings” or “Select Cases” dialogue box as you see in the screen shots below.
- Click *Create* when finished – a list will now generate.

Select Cases

Cases Included Clear Recall Memorize

Location Multiple Nodes

From Case #

To Case #

Judicial Officer

Case Category

Case Type

Case Subtype

Case Security Group

Offense Codes

Cause of Action

Case Status

Case Flag

Event Type

Created by User

Create Exit

Select Hearings

Hearings Included Clear Recall Memorize

Location Multiple Nodes

Hearing Type

Judicial Officer

Hearing Between and

Created by User

Created Between and

Where Case Has

Active Bonds

Bond Type

Create Exit

4. Select the yellow **Save** if you plan on using the list more than once. Otherwise, continue to Performing Action to a List of Hearings or Cases.

List Manager - [Case Manager] (GNIeman)

File View Tools Centers Developer Help

odyssey

Group Disbursements
Export Check History
Garnishment Processing

Bonds
Add a Received Bond
Add an External Bond

List Manager

Location: Multiple Sort Case # Show 50 Matches Per Page

List Name: Unsaved Perform Query Perform Action

Cases Load Save Clear Copy Convert

Case #	Style	Case Type	Judicial Officer	Status
41C01-1412-GU-00014	In Re: the Guardianship of Jacob J. Fields	GU - Guardianship 12/17/2014	Loyd, K. Mark Johnson Circuit Court	Pending 12/17/2014
41D01-1412-FM-00027	In Re: The Estate of H. Kenneth WFhh	FM - Estate, Miscell...	Barton, Kevin	Decided



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- Enter a name for your list and select **Save**. This will allow you to access your list for later use. NOTE: If you will need to refer to this list regularly, choose a meaningful name, like "Judge's Hearings Oct. 2008." Use the comments field to help you remember as well.

Save Current List ✕

Name	Date	Time
Review Files	01/06/2015	2:31 AM
1515	01/05/2015	12:39 PM
Tickler Report	01/05/2015	7:04 AM
Traffic Follow Up	01/05/2015	3:36 AM
Traffic Deferral Agreement Filed	01/05/2015	3:34 AM
Delinquent Accounts - Juvenile	01/05/2015	2:30 AM
Follow Events - Clerk Moore	01/02/2015	5:31 AM
Review Files 12:00	01/02/2015	2:25 AM
Superior Tickler Report	01/01/2015	6:37 AM
Taken Under Advisement	12/29/2014	6:06 AM
Pre-2011 Cases Transfer from D03 to C01	12/24/2014	5:15 AM

Name to Save ←

Comment

✓ ABC

→ Save Exit

Managing or Modifying a List:

← List Manager Exit

Location: **Multiple** Sort: Case # Show: 50 Matches Per Page

List Name: **Probate Cases Files Between 12/8/14 - 1/5/15** Perform Query Perform Action

Cases Load Save Clear Copy Convert

Case #	Style	Case Type	Judicial Officer	Status	+
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- Load:** Allows you to load a list you have previously saved or a list generated from a previously run report.
- Save:** As explained above, this will allow you to save a list once you have performed a query.
- Clear:** This clears your list from the window. Be sure to save it first if you would like to refer back to the list.
- Copy:** This will allow you to copy the list to another person in your office or to the help desk when you need assistance.
- Convert:** You can convert your list into another list type to perform a particular action. For example – if you create a Case List and would like to print hearing notices, you will first need to *Load* the Case List and click *Convert* so that it will be a Hearings List.
- Add:** If you click the sign on the screen, you can add individual cases to the list you have on the screen.

You can manage individual cases from a list in List Manager. After you load your list in List Manager, click on the case within your list. This will take you directly to your cases – much like the Case History option from your Find a Case screen. Once you are finished viewing that case, you can Exit/Save; this will take you back to your list in List Manager.



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To Perform an Action from a List of Hearings (Print Rescheduled Hearing Notices):

1. Create a list of hearings or select a list you have saved.
2. Click *Perform Action* (upper right of screen).
3. Click "Print hearing notice" box and fill out the appropriate fields from the drop-down boxes. Click ***Continue***.

Print Hearing Notice

Civil	Hearing Notice Setup	Notice of Rescheduled Heari
Criminal	Hearing Notice Setup	
Family	Hearing Notice Setup	
Probate	Hearing Notice Setup	

Print / Send Notices for Canceled Hearings

Continue Exit

4. The notices will now print. You should see the following prompt.

Print Hearing Notice Complete

The Print Hearing Notice has been successfully completed.

OK

To Perform an Action from a List of Cases:

1. Create or load a list of cases to which you would like to perform an action.
2. Click the *Perform Action* button.
3. Select an action from the list.

Select Action

- Add Attorney
- Assess Case Fees and Fines
- Batch Notices
- Batch Print Case Labels
- Case Reassign Judge
- Case Reassign Judicial Officer and Location
- Case Reassign Location
- Expunge Cases
- Generate Criminal Case Warrants

Exit



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4. Fill in the appropriate fields in the prompt (** Fields outlined in BLUE are required fields.) and select Continue/Submit/ Save. Some actions will perform automatically. Below are the prompts you will see:

Add Attorney:

Add Attorney

Party Connection: Plaintiff

Attorney: Smart, John M.

Type: Attorney

Appointed Public Defender

Added: 01/07/2015

Comment: _____

Continue **Exit**

Assess Case Fines and Fees:

Assess Case Fines and Fees

Case Category: Civil

Assessment Date: 1/7/2015

Fee Schedule: _____

Assess to First: _____

Assess on Charge(s): _____

Level: _____

Apply Any Prompt to All Cases

Prevent Reassessment

Continue **Exit**

Case Reassign Judge:

Reassign Judicial Officer

Manual System

New Judicial Officer: _____

Override Case Type Configuration

Use Default Judge Configuration if available

Date Transferred: 01/07/2015

Reason: _____

Comment: _____

Incomplete Action

List Name: _____

Submit **Exit**

Case Reassign Judicial Officer and Location:

Reassign Judicial Officer and Location

Date Reassigned: 01/07/2015

Reason: _____

Comment: _____

Judicial Officer

Manual System

New Judicial Officer: _____

Override Case Type Configuration

Use Default Judge Configuration if available

Location

New Location: _____

Use previous case numbers

Incomplete Action

List Name: _____

Submit **Exit**

Case Reassign Location:

Reassign Location

New Location: _____

Date Transferred: 01/08/2015

Reason: _____

Comment: _____

Use previous case numbers

Incomplete Action

List Name: _____

Submit **Exit**

Generate Criminal Case Warrants:

Generate Criminal Case Warrants

Type: Bench Warrant

Issuing Judge: Dungan, Sara

Warrant Location: Clerk's Office

Continue **Exit**



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Print Case Form:

Pay/Appear Past Due Batch Notices:

Schedule Hearings:

Session Search Results	Previous	Next	Selected Sessions
1 0% 01/12/2015 8:30 AM - 4:30 Morgan County Supe Jury Trial Crane, Jane Spence Morgan County Supe			Click on a row in the Session Search Results table.
2 0% 01/13/2015 8:30 AM - 4:30 Morgan County Supe Jury Trial Crane, Jane Spence Morgan County Supe			
3 0% 01/15/2015 8:30 AM - 4:30 Morgan County Supe Jury Trial Crane, Jane Spence Morgan County Supe			
4 0% 01/16/2015 8:30 AM - 4:30 Morgan County Supe Jury Trial Crane, Jane Spence Morgan County Supe			
5 8% 01/29/2015 8:30 AM - 4:30 Morgan County Supe Jury Trial Crane, Jane Spence Morgan County Supe			
6 0% 02/10/2015 9:00 AM - 12:00 Morgan County Supe Pro Supps Crane, Jane Spence Morgan County Supe			

Print Case Summaries:

Update Cases:

5. The action you have selected for your cases will now be complete.