



Odyssey CMS Cheatsheet

Topic: Managing the Location of your Case Files in Odyssey

Date: 10/23/2015

Summary: This cheatsheet explains how to change your case files location for individual files and in batch.

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.

To move your file location on an individual file from the Summary Tab:

1. From the summary tab, click the Case Files link.

33C01-1304-CC-000178

Forms Save Exit

Summary Detail Parties Events Service Hearings Conditions Causes Disposition Time Stds Financial Prot. Orders Warrants

Capital One Bank (USA) NA vs. Pamela Stanczak

Status **Decided** 873

Filed 04/03/2013

Type **CC - Civil Collection**

Court Henry Circuit Court 1

Judicial Officer Willis, Mary G

Financial Balance 4,383.12

Most Recent **Events & Hearings** Case Summary

- 06/19/2015 Administrative Event
Court returns the tendered Minute Sheet Entry received on 5-29-15 to counsel for Plaintiff, with request that
- 06/19/2015 Administrative Event
Court returns the tendered Minute Sheet Entry received on 5-29-15 to counsel for Plaintiff, with request that
- 06/19/2015 Correspondence to/from Court Filed
File Stamp: 05/29/2015
Correspondence received from Plaintiff requesting Plaintiff's name be corrected.
- 08/09/2013 Hearing Journal Entry (Judicial Officer: Willis, Mary G)
Hearing Date: 08/09/2013
Appearances: Plaintiff by Counsel, Rick Sprunger; Defendant, Pamela Stanczak. Proceeding Supplemental hear

statistical closure
05/20/2013 Default Judgment in Civil Cases

case file
Clerk's Office

flags & actions due

2. From the View Case File History screen, click the Move File button.

View Case File History

Sort [dropdown]

Volume [input]

08/21/2013	Clerk's Office
08/08/2013	Circuit Court 1
05/22/2013	Clerk's Office
05/13/2013	Circuit Court 1
04/03/2013	Clerk's Office

Move File Exit



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- From the *Move Case File* screen, click the drop down box for the *Location/Custody* box and select the new location. You may add a comment in the comment field. Adding a comment will display on the Summary Tab if you hover over the file location. It will also display on a file location history and the Case File Tracking report.
- Click Continue.

The screenshot shows the 'Move Case File' window. At the top, there is a 'Volume' dropdown set to 'Volume 1' and a 'View History' button. Below this is the 'New Location/Custody' section, which includes a 'Date' field set to '08/21/2015', a 'Time' field, and a 'Location/Custody' dropdown menu currently set to 'Basement'. A red arrow points to this dropdown. Below the dropdown is a 'Comment' field containing the text 'File moved due to space constraints.' Another red arrow points to this comment field. At the bottom of the window, there are 'Continue' and 'Exit' buttons. A red arrow points to the 'Continue' button.

- In instances where a case file has been moved but a hearing has been set, you can add that information under the *Due Location/Custody* header. This will indicate that the file must be pulled from the current location on a certain date. This comment will appear on the Summary tab.

The screenshot shows the 'Move Case File' window. At the top, there is a 'Volume' dropdown set to 'All' and a 'View History' button. Below this is the 'New Location/Custody' section, which includes a 'Date' field set to '08/24/2015', a 'Time' field, and a 'Location/Custody' dropdown menu currently set to 'Basement'. Below the dropdown is a 'Comment' field containing the text 'File moved due to space constraints.' Below this is the 'Due Location/Custody' section, which includes a 'Date' field set to '09/30/2015', a 'Time' field set to '1:00 PM', and a 'Location/Custody' dropdown menu currently set to 'Circuit Court 1'. Below the dropdown is a 'Comment' field containing the text 'Hearing set; pull case for court.' A red arrow points to this comment field. At the bottom of the window, there are 'Continue' and 'Exit' buttons.



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6. In instances where there is more than one physical file for a case number, you may add “volumes” to your file history.
 - a. From the Move Case File screen, click the picker box next to Volume:

The screenshot shows a dialog box titled "Move Case File". At the top, there is a "Volume" dropdown menu currently set to "Volume 1". A red arrow points to this dropdown. Below this are two sections: "New Location/Custody" and "Due Location/Custody". The "New Location/Custody" section includes a date field (08/21/2015), a time field (12), a location/custody dropdown (Basement), and a comment field containing "File moved due to space constraints." The "Due Location/Custody" section has similar fields but they are empty. At the bottom of the dialog are "Continue" and "Exit" buttons.

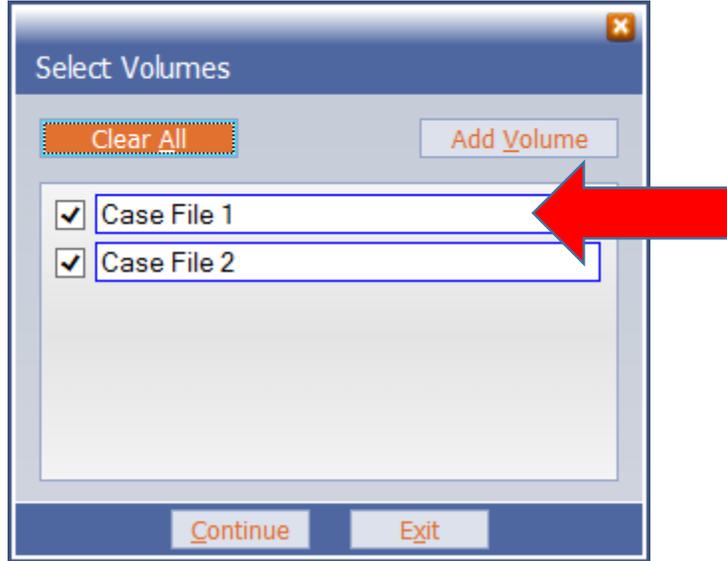
- b. Click *Add Volume*. Name defaults to “Volume 1, Volume 2, etc.”

The screenshot shows a dialog box titled "Select Volumes". At the top, there are two buttons: "Clear All" and "Add Volume". A red arrow points to the "Add Volume" button. Below the buttons is a list of volume entries, each with a checked checkbox and a text field. The entries are "Volume 2" and "Volume 1". At the bottom of the dialog are "Continue" and "Exit" buttons.

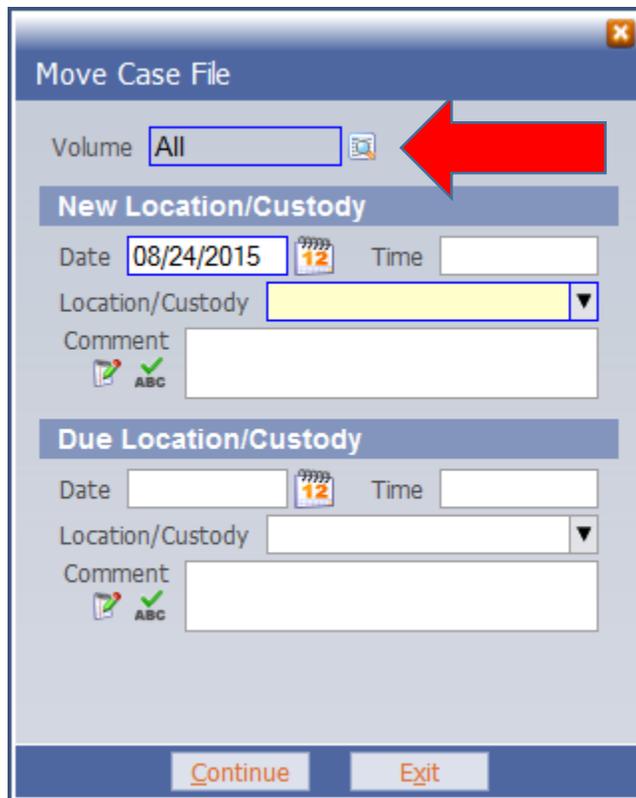


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- c. You can rename your case files if necessary.



- d. Click *Continue*.
- e. When selecting files to move, you can move individual volumes or all the files by checking and unchecking each file. If all Volumes are checked the Volume will show "All" indicating that all files associated with that case ID have been moved.





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f. If you split locations between volumes this will be indicated on the Summary Tab.

33C01-1305-CC-000233

Summary | Detail | Parties | Events | Service | Hearings | Conditions | Causes | Disposition | Time Stds | Financial | Prot. Orders | Warrants

Midland Funding LLC v. Sheila Heck

Status: **Decided** 843
 Filed: 05/03/2013
 Type: CC - Civil Collection
 Court: Henry Circuit Court 1
 Judicial Officer: Willis, Mary G
 Financial Balance: 0.00

Most Recent **Events & Hearings** [Case Summary](#)

- 07/17/2014 Clerk Administrative Event
Order Releasing Continuing Wage Garnishment sent regular mail to Walmart.
- 07/09/2014 Order Granting Motion to Stop Garnishment
Order Signed: 06/30/2014
Order Releasing Continuing Wage Garnishment entered by Senior Judge, Rex L. Reed. Clerk to forward same
- 07/09/2014 Administrative Event
File Stamp: 06/30/2014
Rex L. Reed appointed and qualified as Senior Judge.
- 07/09/2014 Motion to Stop Garnishment Filed

statistical closure
06/17/2013 Default Judgment in Civil Cases

case file
Volume 1, Volume 2 - Basement
Volume 3 - Circuit Court 1

To move your file location on an individual file from the Details Tab:

1. From the details tab, click the plus sign in the Case Files header.

Capital One Bank (usa) Na v. Mabel Porter
Type: CC - Civil Collection

Style: Capital One Bank (usa) Na
v. Mabel Porter
 Auto Style

Case Assignment [Reassign](#)

Case Number: 33C01-1305-CC-000231
 Court: Henry Circuit Court 1
 Date Assigned: 05/02/2013
 Judicial Officer: Willis, Mary G

Case Files [+](#)

- Clerk's Office

Case Status [+](#)

07/09/2013 Decided

Related Cases [+](#)

2. From the *Move Case File* screen, click the drop down box for the *Location/Custody* box and select the new location. You may add a comment in the comment field. Adding a comment will display on the Summary Tab if you hover over the file location. It will also display on a file location history.
3. Click Continue.



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To Print a File Location History:

1. From the summary tab, click the Case Files link.

2. From the *View Case File History* screen:
 - a. You can sort your history by clicking the *Sort* drop down.
 - b. Click *Print*



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View Case File History

Sort: **Date/Time Descending**

Volume

08/24/2015	Basement
File moved due to space constraints.	
08/21/2013	Clerk's Office
08/08/2013	Circuit Court 1
05/22/2013	Clerk's Office
05/13/2013	Circuit Court 1
04/03/2013	Clerk's Office

Print Move File Exit

3. From the *Case File History Printout* screen, click the *Print* button.

Case File History Printout

CASE FILE HISTORY

CASE No. 33C01-1304-CC-000178

CAPITAL ONE BANK (USA) NA

VS. PAMELA STANCZAK

§
§
§
§
§

Court: Henry Circuit Court 1
Judge: Willis, Mary G
Filed On: 04/03/2013

VOLUME 1

Volume 1	08/24/2015	Basement	File moved due to space constraints.
Volume 1	08/21/2013	Clerk's Office	
Volume 1	08/08/2013	Circuit Court 1	
Volume 1	05/22/2013	Clerk's Office	
Volume 1	05/13/2013	Circuit Court 1	
Volume 1	04/03/2013	Clerk's Office	

Print Exit



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To Change Location on multiple cases:

1. From the left navigation, select *Move Multiple Case Files*. Select the County/Court and Continue.

The screenshot shows the Odyssey CMS interface. On the left is a navigation menu with categories like 'Add a Case', 'Protection Orders', 'Court Administration', 'Fees & Finances', 'user preferences', and 'Bonds'. A red arrow points to the 'Move Multiple Case Files' option in the 'Court Administration' section. The main area shows 'quick links' for court administration, fees & finances, forms & documents, reporting, user preferences, and administration. A 'Select Location' dialog box is open, displaying a list of courts with checkboxes. A red arrow points to the 'Henry County' checkbox, which is selected. The dialog box has 'Continue' and 'Exit' buttons at the bottom.

2. From the *Move Multiple Case Files* screen, click the drop down box for the *Location/Custody* section and select the location to where the files will be moved. You may add a comment in the comment field.

The screenshot shows the 'Move Multiple Case Files' screen. At the top, there are 'Save' and 'Exit' buttons. Below is a form with fields for 'Date' (08/21/2015), 'Time', 'Location/Custody' (Basement), and 'Comment'. A red arrow points to the 'Location/Custody' dropdown menu. To the right, under 'These Case Files', there are radio buttons for 'Single', 'Range', and 'List', and input fields for 'Case #' and 'Addtl Barcode'. An 'Add' button and an 'All volumes' checkbox are also present. At the bottom, there is a table header for 'Volumes to be Moved' with columns: Case Number, Style, Volume, Current Loc/Custody, and To Loc/Custody.

3. Under the *These Case Files* header, you will create your list of files.
 - a. If the Single radio button is selected, you can type in your case number or scan the case's bar code.
 - b. Check mark the *All Volumes* field,
 - c. Click *Add* and this case will be added to your list. Repeat this step for all the files to be moved. You may use the Magnifying Glass search option if you need to search for the case number.



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Move Multiple Case Files [Save] [Exit]

Move to This Location/Custody
 Date: 08/21/2015 [Calendar Icon] Time: [Time Field]
 Location/Custody: Basement [Dropdown]
 Comment: [Text Area]

These Case Files
 Single Range List
 Case #: 33C021305CC000231 [Search Icon]
 Add Barcode: [Text Field] [Add]
 All volumes

Volumes to be Moved

If you want to move a range of cases for a specific court, follow the steps below:

- d. Select the Range radio button.
- e. Enter the case numbers for a specific case type in the from case number and to case number fields
- f. Check mark the *All Volumes* field
- g. Click *Add*

All cases for a specific court in the range provided will be added to your list.

Move Multiple Case Files [Save] [Exit]

Move to This Location/Custody
 Date: 08/21/2015 [Calendar Icon] Time: [Time Field]
 Location/Custody: Basement [Dropdown]
 Comment: [Text Area]

These Case Files
 Single Range List
 From Case #: 33C011305cc000231 [Search Icon]
 To Case #: 33C011305cc000275 [Search Icon]
 [Add] All volumes

Volumes to be Moved

Case Number	Style	Volume	Current Loc/Custody	To Loc/Custody
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If you want to move a list of cases created from a report that you ran, follow the steps below:

- h. Run your report and give it a List Name. (This will make the list available in list manager as well as for moving case files.)
- i. Select *Move Multiple Case Files*
- j. Select Fill in the information to the left under *Move to this location/custody*
- k. Select the List radio button.
- l. Check mark the *All Volumes* field and click *Add*

All cases from your list will be added to your case files to be moved list.

Move Multiple Case Files [Save] [Exit]

Move to This Location/Custody
 Date: 08/21/2015 [Calendar Icon] Time: [Time Field]
 Location/Custody: Basement [Dropdown]
 Comment: [Text Area]

These Case Files
 Single Range List
 List Name: Henry Cases [Search Icon]
 [Add] All volumes

Volumes to be Moved



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- When you have your list created, click the *Save* button at the top of the screen and the file location on all the cases will be changed from their current location to their new location.

Move Multiple Case Files

Move to This Location/Custody: Date: 08/21/2015, Time: [], Location/Custody: Basement, Comment: []

These Case Files: Single, Range, List, List Name: [], Add, All volumes

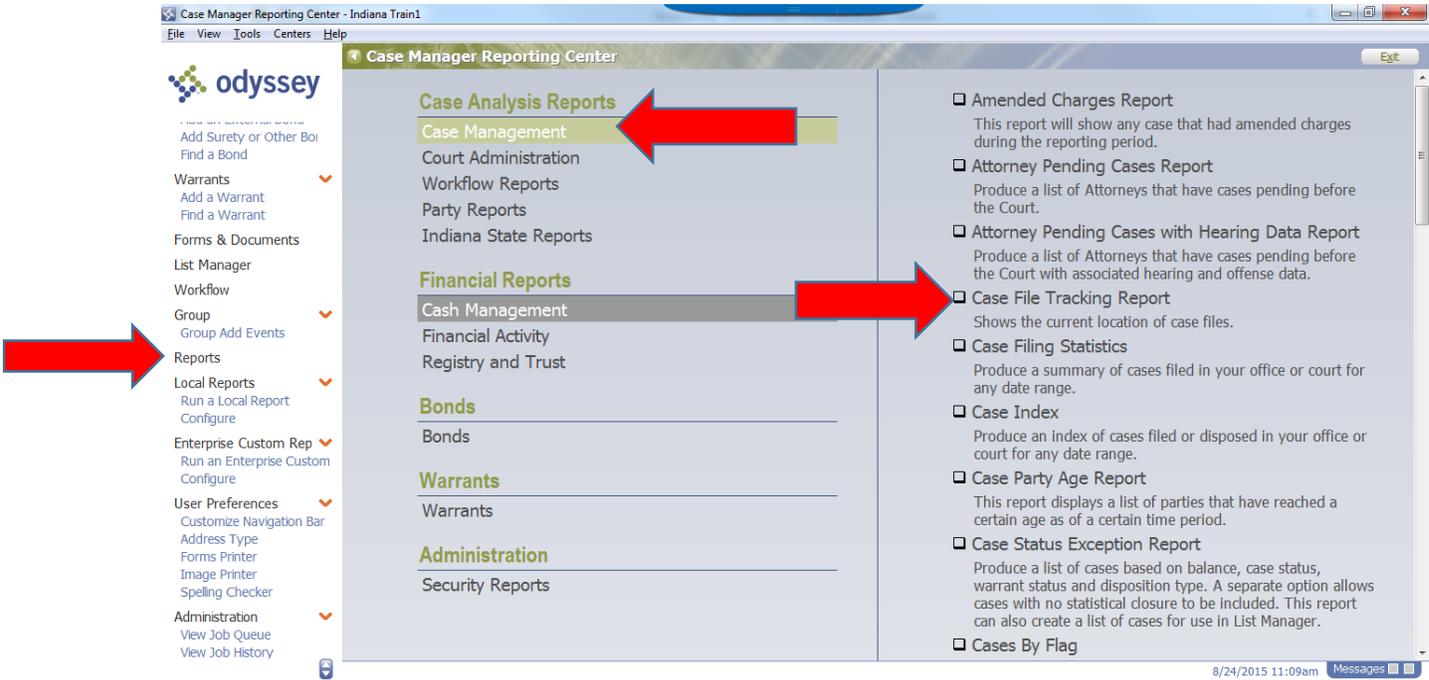
Case Number	Style	Volume	Current Loc/Custody	To Loc/Custody
33C01-1305-CC-0002	Capital One Bank (USA) NA vs. Mabel Porter	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Midland Funding LLC vs. Sheila Heck	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Capital One Bank (USA), N.A. vs. Edward E Deffinge	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	LVNV Funding LLC vs. Kimberly Hill	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	LVNV Funding LLC vs. Jeremy S Marlatt	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Main Street Acquisition Corp. vs. Larry Marsh	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	LVNV Funding LLC vs. Frank Rady	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Technology Insurance Company vs. Regal Restoratio	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	LVNV Funding LLC vs. Donald Norton	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Midland Funding LLC vs. Clarence Stephens	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Midland Funding LLC vs. Teresa Brammer	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Midland Funding LLC vs. Amy Melton	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Capital One Bank (USA), N.A. vs. Gregory Wardlow	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Midland Funding LLC vs. Bryan Guffey	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	American Acceptance Co LLC vs. Miles Wendell	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Amerifirst Home Improvement vs. Rodney Winkle	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Star Financial Bank vs. Jason Strunk	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Discover Bank vs. Bryan Stephens	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Springleaf Financial Services of Indiana Inc vs. Polly	Volume 1	Clerk's Office	Basement
33C01-1305-CC-0002	Personal Finance Company vs. Michael Coates	Volume 1	Clerk's Office	Basement



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To Create a Case File Tracking Report:

1. From the Left Navigation select Reports > Case Management > Case File Tracking Report



2. Fill out your report details:
 - a. Location – County/Court
 - b. Location/Custody – File location
 - c. Case Category
 - d. Case Type
 - e. List Name – Name of your report
 - f. Check *Include Sub Location*

Case File Tracking Report

Shows the current location of case files.

Locations: Henry County; Henry County Circuit Courts; He

Location/Custody: Basement

Case Category: All

Case Type: All

Case Subtype:

Include Cases Without a Subtype

List Name: Basement Cases - Moved

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

Report Options: Include Sub Location, Save as CSV



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g. Printed report will look like screen capture below. Comments will show on this report.

The screenshot shows a web browser window displaying a 'Case File Tracking Report'. The window title is 'INSUPREMETRAIN1'. The report is filtered by 'Location/Custody: Basement', 'Case Category: All', and 'Case Type: All'. The report lists various case files with columns for Case Number, Style, Volume, Case Type, Subtype, Date/Time, and Comment. The interface includes a toolbar at the top with navigation buttons and a search bar.

Case Number	Style	Volume	Case Type	Subtype	Date/Time	Comment
33C01-1301-EU-000006	In Re: the Estate of William Mains	All Volumes	EU - Estate, Unsupervised		08/06/2014	
33C01-1301-EU-000008	In Re: the Estate of Dale Yost	All Volumes	EU - Estate, Unsupervised		09/16/2014	
33C01-1301-EU-000014	In Re: the Estate of Jocie Guffey	All Volumes	EU - Estate, Unsupervised		07/24/2014	
33C01-1301-GU-000005	In Re: the Guardianship of Mary Lawrence	All Volumes	GU - Guardianship	Guardian: Adult	07/24/2014	
33C01-1302-EU-000018	In Re: the Estate of Robert Snodgrass	All Volumes	EU - Estate, Unsupervised		09/23/2014	
33C01-1302-EU-000020	In Re: the Estate of Harold Bell	All Volumes	EU - Estate, Unsupervised		04/03/2014	
33C01-1302-EU-000022	In Re: the Estate of Patsy Andrew	All Volumes	EU - Estate, Unsupervised		11/26/2013	
33C01-1303-EM-000035	In Re: The Estate of Diana Jones	All Volumes	EM - Estate, Miscellaneous	Inheritance Tax	03/19/2013	
33C01-1303-EU-000028	In Re: the Estate of Joe Pearce	All Volumes	EU - Estate, Unsupervised		06/17/2014	
33C01-1303-EU-000038	In Re: the Estate of Doris McNabb	All Volumes	EU - Estate, Unsupervised		09/16/2014	
33C01-1303-EU-000039	In Re: the Estate of Barbara Hoover	All Volumes	EU - Estate, Unsupervised		02/19/2014	
33C01-1304-EM-000048	In Re: The Estate of Paula Basler	All Volumes	EM - Estate, Miscellaneous	Probate Will Only	04/24/2013	
33C01-1304-EM-000051	In Re: The Estate of Bessie Hopper	All Volumes	EM - Estate, Miscellaneous		06/15/2015	
33C01-1304-EU-000046	In Re: the Estate of Donald Wallace	All Volumes	EU - Estate, Unsupervised		04/29/2014	
33C01-1304-EU-000054	In Re: the Estate of Phillip Carson	All Volumes	EU - Estate, Unsupervised		01/29/2014	
33C01-1304-GU-000012	In Re: the Guardianship of Icarus Ragan	All Volumes	GU - Guardianship	Guardian: Minor	05/07/2013	
33C01-1305-CC-000231	Capital One Bank (USA) NA v. Mabel Porter	Case File #1 of 2	CC - Civil Collection		08/21/2015	File moved due to space constraints.
33C01-1305-CC-000231	Capital One Bank (USA) NA v. Mabel Porter	Case File #2 of 2	CC - Civil Collection		08/23/2015	File moved due to space constraints.
33C01-1305-CC-	Midland Funding LLC	All Volumes	CC - Civil Collection		08/21/2015	