



Odyssey CMS Cheatsheet

Topic: Microfilm Indexing
Date: 10/9/2014

Summary: This cheatsheet will outline the process for adding microfilm information to Odyssey both for case files and RJO indexes.

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.

Adding Case File Microfilm Information to Cases:

1. Click on "Find a Case" from the left navigation bar. Type in the case number or party name for the file that has been microfilmed. Once the search results appear, click into the proper case.

Note: There are 3 options that can be utilized when adding case file microfilm information to a case in Odyssey. Your County can select to use one of these options, or all three.

Option 1: Adding an Event to the case. This event is non-docketable. This means that you are able to update the event. This also means that the event will not show on the CCS/ or Odyssey Public Access.

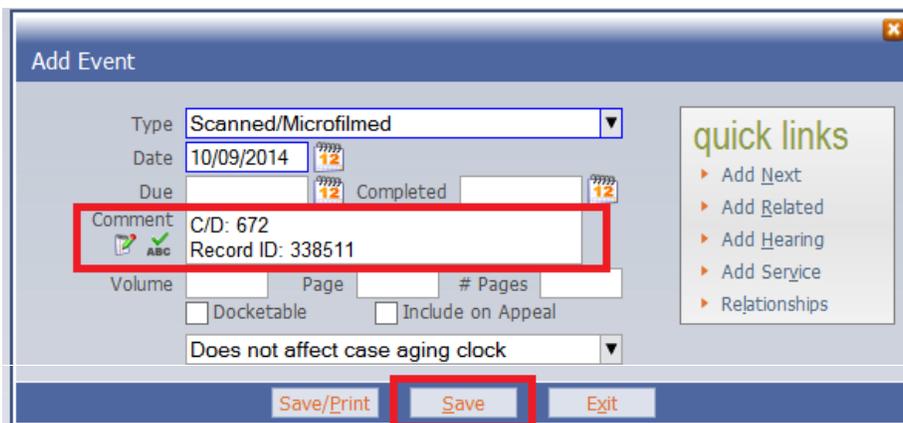
2. Click on the Events Tab.



3. Once on the Events Tab, click the + to Add an Event. Once the "Add Event" box appears type the code "MIC" into the Type box to add the "Scanned/Microfilmed" event. You can also use the drop down or the F4 search feature.



4. Leave the Date field defaulted to today's date. Add a Comment indicating the CD information for the microfilmed file, and any other information needed to locate that CD/Reel in the future. When finished with your comment, click "Save" to save the event to the case.



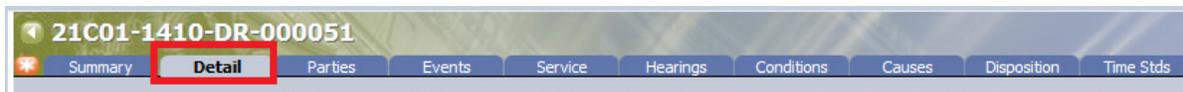
5. The event with the CD location will now be saved on the case and can be viewed from the Events Tab, the Summary Tab or the case's CCS.



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Option 2: Adding a Case Flag. The Case Flag type will show on the CCS/Odyssey Public Access.

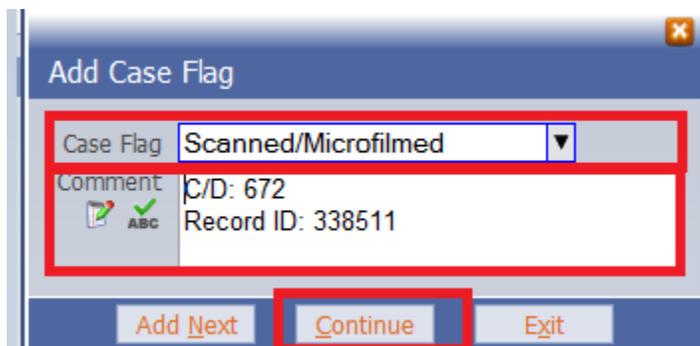
6. Click on the Detail Tab.



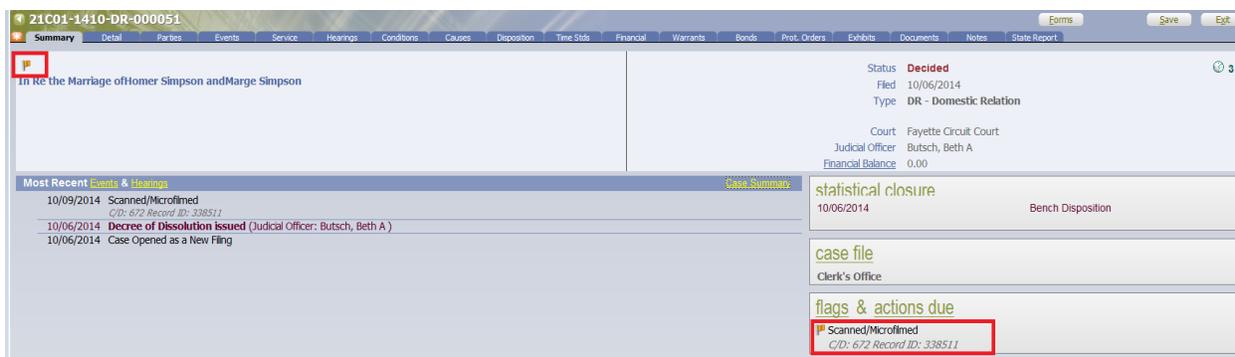
7. Click the + next to "Case Flags".



8. From the dropdown choose the "Scanned/Microfilmed" Case Flag. Add a Comment indicating the CD information for the microfilmed file, and any other information needed to locate that CD/Reel in the future. Click "Continue" to add this Case Flag to the case.



9. The Case Flag will show on the Detail Tab, Summary Tab and next to the Case Style in the case and in the search results screen. A Case Flag of "Scanned/Microfilmed" will also show on the CCS/Odyssey Public Access, but the comment field will not show there.





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Option 3: Adding a Case File Location.

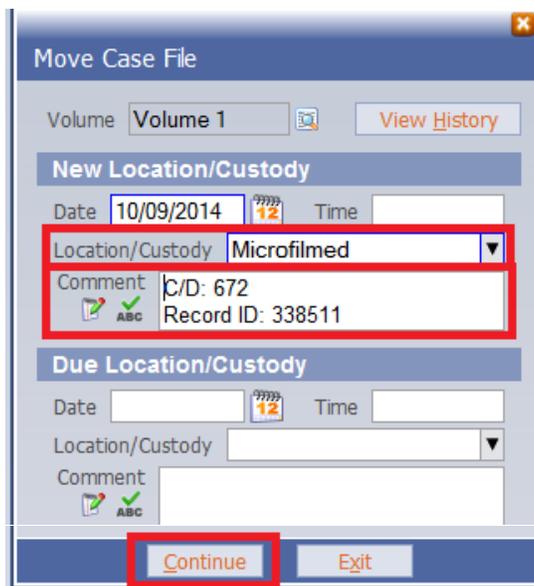
10. Click on the Detail Tab.



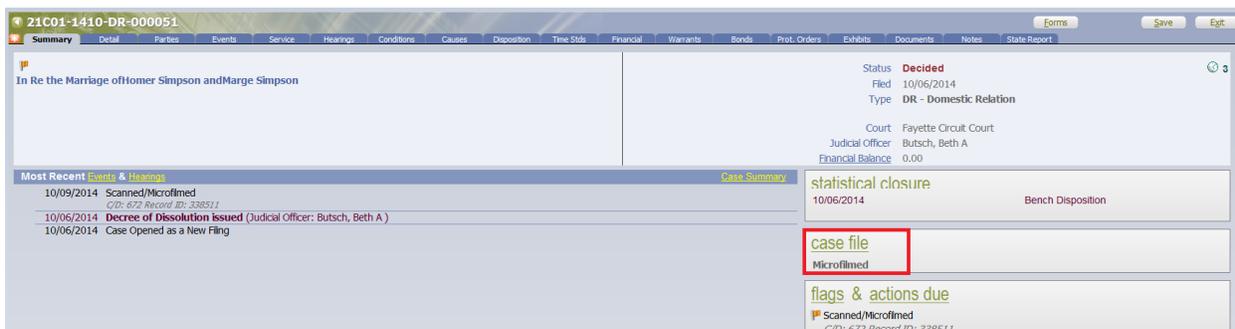
11. Click the + next to "Case Files".



12. From the "Location/Custody" dropdown, choose "Microfilmed". Add a Comment indicating the CD information for the microfilmed file, and any other information needed to locate that CD/Reel in the future. Click "Continue" to add this Case File Location to the case.



13. The Case File Location will now show on the Detail Tab and Summary Tab, but not on the CCS/Odyssey Public Access. To see the CD information, click into the Case File Location on the Detail Tab.





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Adding Order Index Information to Odyssey:

1. Create a CB case per year/per court particularly for the Microfilm Index.
2. On the Detail Tab, add a Case Cross Reference Number. The Cross Reference type will be Microfilm Index and the number will follow this format: County Identifier, Court Identifier – Year that the Microfilm Records are from. For example, for Morgan County microfilm order index from Circuit Court 2006 use 55C01-2006.

The screenshot shows the 'Detail' tab for case 55C01-1408-CB-001526. The case is titled 'RJO Index for Circuit Court' and is of type 'CB - Court Business'. The 'Case Assignment' section shows the case number, court (Morgan County Circuit Court), date assigned (08/27/2014), and judicial officer (Hanson, Matthew G). The 'Case Cross Reference Numbers' section is highlighted with a red box, showing a plus sign icon. The 'Case Status' is 'Decided' as of 08/27/2014.

The dialog box is titled 'Add Case Cross Reference Number'. It has two input fields: 'Number' with the value '55C01-2006' and 'Type' with the value 'Microfilm Index'. Both fields are highlighted with a red box. There are 'Continue' and 'Exit' buttons at the bottom.

3. Once the case is added, a “Scanned/Microfilmed” event can be added with CD information for each CD used for that court and year. Refer to steps 2-4 above in order to add the event.
4. You will now be able to search by the Case Cross Reference number, as well as the CB case number. This will be helpful because the searcher will only need to know the Court and the Year of the record in order to find the appropriate CB case.

The screenshot shows the 'Find A Case' search page. The 'Search by Case Information' section has a 'Cross Ref' field with the value '55C01-2006' and a 'Type' dropdown set to 'Microfilm'. Both fields are highlighted with a red box. There are also sections for 'Search by Party Information' and 'Search by Attorney Information'. On the right side, there are 'quick links', 'search options', and 'case categories' sections.