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# State of Indiana Trial Court Technology Odyssey Case Management System Implementation

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## Training Manual

### Case Manager Basics Module

*Version 1.0*

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## Case Manager Basics

### Description

The Case Manager Basics Module is an introduction to the Odyssey Case Management System (CMS). The Basics Module allows the user of the Odyssey CMS to acquaint themselves with the Odyssey software application, its terminology, basic screen configurations with Case Manager, data entry, warning dialogs, case basics, and the general operations of the application such as logging on and off.

### Purpose

This module is the initial course in the training curriculum for anyone and everyone and is a prerequisite to all other Odyssey CMS training courses.

## 1. Accessing Odyssey

### 1.1. Signing On to Odyssey

- Using your mouse, *double-click* the **Case Manager Icon** on your Windows Desktop. 
- The Welcome to Odyssey Window (Figure 1-1) appears.
- *Type* your **User ID** and **Password**.
- *Click* the **Sign On** button. 
- The Case Manager Home Page (Figure 1-2) appears.



Figure 1-1 Welcome to Odyssey Window



## 1.2. Signing Off of Odyssey

You may Sign Off of Odyssey in one of two ways

- Click the  in the upper right-hand corner of the screen or
- Click **File** in the upper left-hand corner. *Using the drop-down list, click **Sign Off**.*

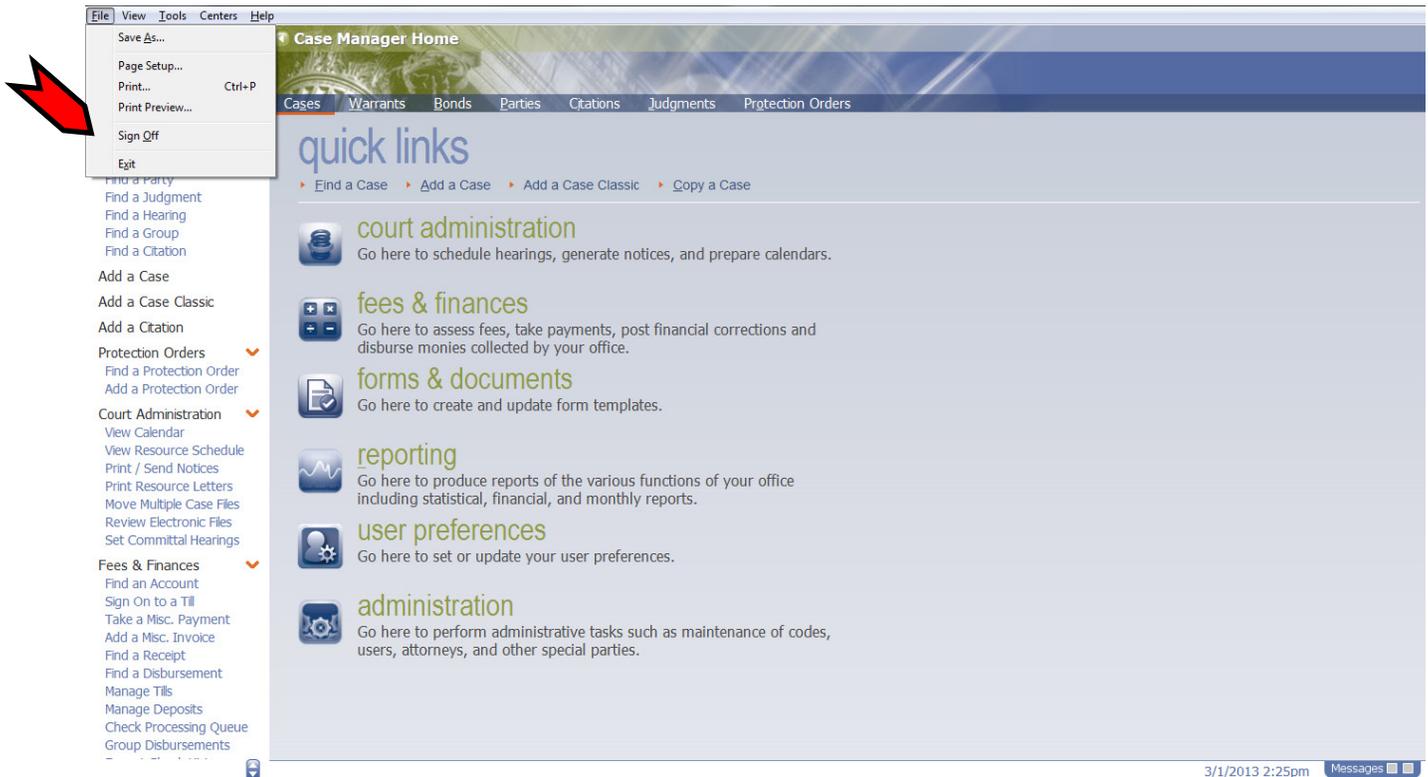


Figure 1-2 Case Manager Home Page

## 1.3. Case Manager Rights and Roles

An administrator associates a user records with a role. Roles are like a “bucket” of individual rights associated with various modules within the system. The role a user is assigned determines the parts of the system visible to the user, as well as the data operations the user may perform.

For example, a user may have the right to view a certain piece of information but not the right to delete that information. Whenever a role is assigned to a user, all rights in that role become available to the user.

Odyssey System Administrators have the ability to restrict the dates and times for which a user has access to the system. Thus, a login problem may be related to this restriction as well as a User ID or password.



**Please remember that rights and roles within Odyssey are based on your job responsibilities and are tied directly to your login. It is imperative that when using Odyssey you are logged in under your User ID. You are expected to follow the security standards set forth. Additionally, it is important to note that Odyssey tracks all system activity and links it directly to the User ID performing the action.**



## 2. Odyssey Design and Layout

Odyssey is organized and presented in a way that makes the application easy to navigate.

### 2.1. Case Manager Home Page

The Case Manager Home Page (Figure 2-1) displays all of the elements you use when working within Odyssey. The primary elements include: the Working Space, Navigation Menu, Menu Bars, Message List Window, and Product Center List.

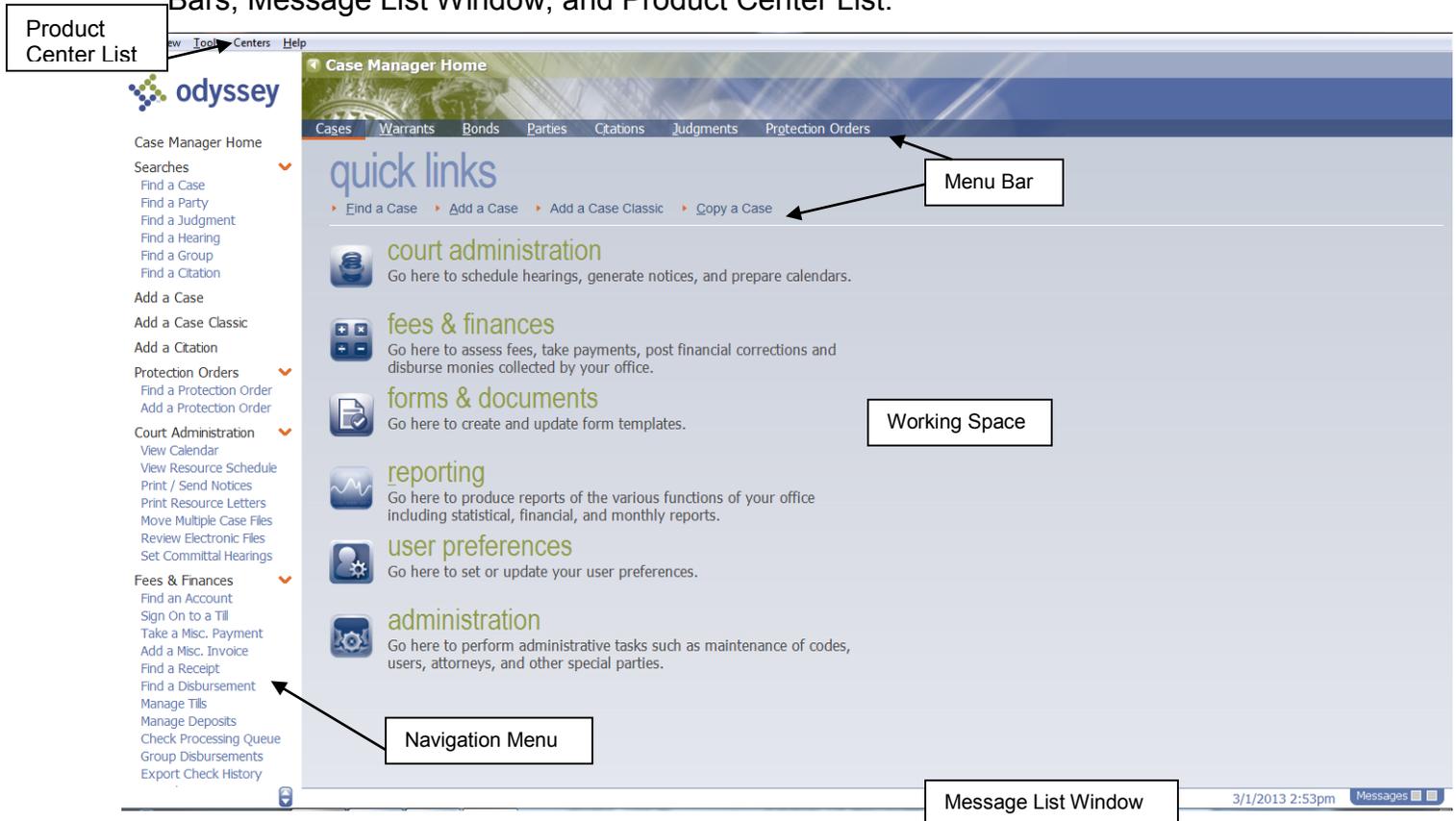


Figure 2-1 Case Manager Home Page

#### 2.1.1. Navigation Menu

The navigation menu is on the left-hand side of the Odyssey Window and contains the primary activities that a user can perform.

- *Click* the activity you would like to perform. The appropriate screen appears.
- *Click* the **up/down arrows**  or *use* the wheel on your mouse to scroll through the activity choices.

#### 2.1.2. Working Space

The working space is the main element of the Odyssey windows. It is where all data entry occurs. This space changes to display the appropriate information and data entry fields for selected functions.



The menu bar provides links to specific options (e.g., Cases, Parties), while the list underneath the menu bar in the working space provides links to specific functions.

### 2.1.3. Menu Bars

There are two different menu bars within the Odyssey Window.

- Windows File Menu Bar- standard Windows menu which provides options that affect the overall window. 
- Case Manager Home Menu Bar- provides options for navigating to different options in the system.



### 2.1.4. Window Header

At the top of each window is a header section which contains buttons to assist with navigation. Only the buttons for available actions will appear.



### 2.1.5. Message List Window

The message list window is located in the bottom right-hand corner of the window and is split into two sections, each with its own button that will turn red if a message exists. The button will flash red if an error exists and green if a warning exists.

The message window contains:

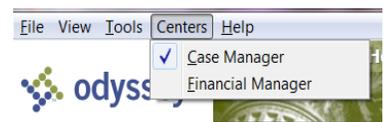
- Critical errors which must be corrected before saving
- Warning messages
- Informational messages

The button to the left indicates product center messages and the button on the right indicates system messages. 

Click the respective message button to view or hide the message list window.

### 2.1.6. Product Center List

The Odyssey system is made up of multiple management products (Case Manager and Financial Manager). The products you have access to will be listed in the Product Center List in the menu bar in the upper left hand corner.





## 2.2. Dialog Boxes

Dialog boxes are windows or pages that “pop up” within Odyssey to allow data entry, searching, or selecting items from a list. Dialog boxes are most often accessed by *clicking* a **hyperlink** or an **icon**. Often times dialog boxes appear when you need to type additional information to perform an action or they will appear to provide system information to the user in the form of errors or warnings.

Reassign Case

**Case Assignment**

Case Number 49G13-1204-OV-026422

New Court **Marion Superior Court, Criminal Division 13**

New Configuration **System Assigned**  System  
 Create Notice for Judicial Officer

Date Transferred 03/08/2013

Reason

Comment

Continue Exit



## Odyssey Navigation and Standard Conventions

### 2.3. Keyboard Navigation

Odyssey is designed for simple keyboard control using a combination of the tab key, arrow keys, function keys, and hot keys.

#### 2.3.1. Tab Key

You may use the Tab key to navigate between data entry fields.

- *Click* the **Tab** key to move forward through the data entry fields. To navigate backward, *press and hold* the **Shift** key. While *holding* the **Shift** key, *press* the **Tab** key.

#### 2.3.2. Arrow Keys

You may use the up and down arrow keys on your keyboard to scroll through the list of options in a drop-down box

#### 2.3.3. Function Keys

Certain functions with Odyssey have been assigned to a function key. The function keys (F keys) are located across the top of your keyboard.

These function keys include:

-  Access online help.
-  Save the information on your current page or dialog box.
-  Move forward through the messages in the standard message area so you don't have to click on them. *Press and hold* the **SHIFT** key and **F3** to move backward through the messages.
-  Launch associated dialog box (e.g., access a code listing dialog box that shows the available codes for the currently selected field).
-  Behaves like a Back button when 'Back' is enabled on a window header.
-  Behaves like a Next button when 'Next' is enabled on a window header.
-  Toggle window to full screen.
-  Call the current context menu (e.g., when  is displayed on a case record, you can access the list of all the available tabs for that case).



### 2.3.4. Hot Key

Underlined letters or numbers indicate a hot key. Using the **Alt** key in combination with the hot key allow you to perform functions quickly.

- *Press and hold* the **Alt** key. While holding the **Alt** key, press the corresponding underlined letter or number.

For example, use the **Alt** key in combination with the **W** key to access the specific links for functions related to warrants.



## 2.4. Mouse Navigation

Odyssey is also designed for navigation using the mouse. Using your mouse, *click* on either **hyperlinks** or **icons** to access the associated screen or dialog box.

### 2.4.1. Commonly Used Icons & Buttons

There are a variety of Icons used throughout the system

-  **Find**- most commonly used to bring up the Find a Party dialog box.
-  **Calendar**- allows you to complete a date field using date selection.
-  **Add**- opens the appropriate “Add” dialog box related to function you are performing.
-  **Picker**- allows you to complete a data field with one or more options from a pre-defined list.
-  **Spell Checker**- checks for accurate spelling on information typed into free text data fields.
-  **Modify/ Edit** – allows you to modify or edit a field.

### 2.4.2. Tab Navigation

Information for parties and cases is separated into specific “tabs.” Some tabs, like the Case Detail and Case Summary tabs, are included with all case types. However, others are only included with specific case types.



To access a particular tab:

- *Click* on the **desired tab**.
- If all the tabs cannot be shown at one time, *click*  or  to scroll the list of available case tabs.



### 2.4.3. Hyperlinks

Hyperlinks are signified by colored text and/or are underlined.

[Case Summary](#)

[Boogs, Paige](#)

### 2.4.4. Tool Tips

To search with a partial name, use an asterisk at the end.

Tooltips are used extensively to provide hints, additional information, and audit details. An example of a tool tip appearing for the Name fields is shown below.

- *Hover* your mouse over the **hyperlink** or **icon** to display the tooltip in a small box.

## 2.5. Data Fields

Information can be entered into Odyssey in a variety of ways. Entering data might be as simple as selecting a check box or manually typing the information into a blank field.

- The name of the data field appears in gray to the left.
- Required data fields have a yellow background and are outlined in bright blue.
- Data fields which may be left blank have a white background.

### 2.5.1. Blank Data Entry Fields

Place your cursor in the field and manually type the information. Information entered into these fields will be saved exactly as it appears when you type it so be certain to use capital letters where appropriate.

### 2.5.2. Drop-Down Box

These data entry fields are populated by using lists with pre-defined choices. *Click* the **Arrow** to the right of the data entry field and the list of choices appears. *Use* the up and down **Arrows** on your keyboard to scroll through the choices, or move your mouse over the choices to highlight the correct option and *click* the mouse or *press* the **Enter** key. When the drop-down list is open, the “type-ahead function” will allow you to select the correct choice without scrolling through the list. For example: *type HI* when searching for Judge Frances Gall Hill in the Judicial Officer drop down box.



### 2.5.3. Radio Button

Radio Buttons are choices listed in a group. The user must select only one choice by *clicking* inside the small circle to the left of the choice.





### 2.5.4. Check Box

Check Boxes are similar to Radio Buttons, however; you may select one or more options from the group. If you would like to select all the possible choice, *click Select All*.

type of party ▶ Select All

- Civil Defendant
- Civil Plaintiff
- Criminal Defendant
- Criminal Defendant - Juvenile
- Probate Executor/Administrator
- Probate Applicant
- Family Defendant
- Family Plaintiff
- Attorney
- Complainant

### 2.5.5. Manual Date Entry

Dates may be manually typed directly into the field in a number of different formats:

- Slashes (12/17/07 or 12/17/2007)
- Hyphens (12-7-07 or 12-17-2007)
- Periods (12.17.07 or 12.17.2007)
- Nothing (121707 or 12172007)



**Note: If you do not include a year (12/17), the system will assume you would like the date to reflect the current year. The system will automatically convert all dates to MM/DD/YYYY format.**

### 2.5.6. Shortcut Formulas for Dates

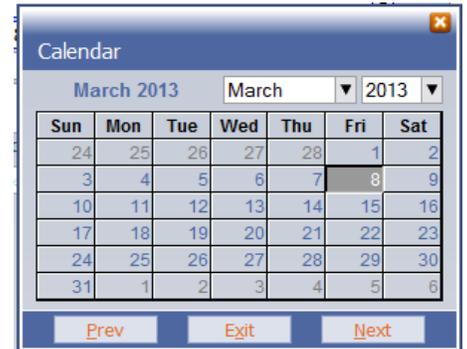
Dates can also be calculated by the system using the formulas below. Type the formula in the date field. *Press Tab* to move to the next field. The correct date will populate.

Formula:	The Resulting Date:
T or t <input type="text" value="t"/>	Today's Date <input type="text" value="02/13/2014"/>
t + or - <#> <input type="text" value="t+6"/>	Today's date plus or minus the number of days <input type="text" value="02/19/2014"/>
w + or - <#> <input type="text" value="w+6"/>	Today's date plus or minus the number of weekdays <input type="text" value="02/21/2014"/>
beg <input type="text" value="beg"/>	First day of the current month <input type="text" value="02/01/2014"/>
end <input type="text" value="end"/>	Last day of the current month <input type="text" value="02/28/2014"/>
<day abbr> <input type="text" value="tues"/>	<b>Tues</b> - Tuesday of the current week <input type="text" value="02/11/2014"/>
last <day> <input type="text" value="last tues"/>	<b>last tues</b> - Tuesday of last week <input type="text" value="02/04/2014"/>
next <day> <input type="text" value="next tues"/>	<b>next tues</b> - Tuesday of next week <input type="text" value="02/18/2014"/>
<shortcut> + or - <#>d	



### 2.5.7. Using the Calendar Icon

- Click  to the right of the date field. The calendar dialog box appears.
- Click on the appropriate date. You may change the month and year by using the arrows to the right of each field or use the **Prev** and **Next** buttons.



Odyssey is designed to help you easily identify mistakes and potential errors, while assisting you with navigation to the erroneous data in error in order to correct it.

### 2.6. Warning Dialogs

Sometimes errors or warnings that require your immediate response are displayed in pop-up dialogs.



### 2.7. Errors

When data-entry mistakes are made, you may continue to enter other data elements. However, the system does not allow you to save until the mistake is corrected. Detailed information regarding the error is found in the Message List Window. The system can help you to navigate to the field with the error so you can correct the mistake.

*Click on the error message in the window*

**or**

*Use the **F3** key to navigate through each error*

#### 2.7.1. Critical Errors

- You cannot save the record until the error is corrected
- The field changes to red

#### 2.7.2. Warnings

- You can save the record by pressing save a second time after reading the message
- The field changes to green
- Indicated by the  icon in the list

#### 2.7.3. Informational Messages

- You can save the record by pressing save a second time after reading the message
- Does not change the color of a field
- Indicated by the  icon in the list



## 3. Case Basics

### 3.1. Case Search

The options on the right side of the Find a Case Window allow you to choose how you want to search for the case, as well as which case types and courts you want to search.

From the Case Manager Home page:

- **Select Find a Case.** The Find A Case Screen appears (Figure 5-1).

Figure 3-1 - Find a Case Window

- **Type case number, additional barcode, cross reference number, party, or attorney information** in the appropriate fields.
- **Click Search** or use the **Alt S** hot key. The Search Results Screen appears (Figure 5-1a). If you search on party name, all connected cases appear on the screen.

Select [Use Advanced Search](#) to display more options to expand your search.

Select [Case History](#) to access a list of the twenty most recent cases you have accessed.



**Note:** You may perform “wildcard” searches by entering the at least the first three letters of the information and an asterisk (\*). You can use the wildcards in the Last Name, First Name, Cross Ref, State ID, and Other Agency fields.



- *Clicking* the hyperlink for the case you want to access takes you to the Summary Screen for that case.

The screenshot shows a web application interface for case search results. At the top, there is a 'Help' link and a 'Search Results' header with navigation buttons: 'Print', 'Back', 'Next', 'Refine', and 'Exit'. Below the header, the results are organized into several sections:

- Section 1:** Case ID 'IF', 'SEE CCS FOR OFFENSE INFORMATION'. Filed On: 12/30/2004, Status: Decided. Judicial Officer: Marshall, Dan E, Court: Hancock Superior Cc, Connection: DEF, Filed As: Smith, Ryan A.
- Section 2:** Party Name: Smith, Ryan A (highlighted with a red arrow), DOB: 08/07/1983, SSN: 312-02-1085, Party ID: 2469992.
- Section 3:** Case ID 30D02-0706-FD-000901, Title: **State Vs. Ryan A. Smith**, Offense: OPERATING A VEHICLE WHILE INTOXICATED, OPERATING A VEHICLE WITH AN ACE OF .15- Same As 1140 But Where Def. Has A Prior Conviction Under Th OWI WITH PRIOR OWI WITHIN 5 YEARS. Filed On: 06/11/2007, Status: Pending. Judicial Officer: Marshall, Dan E, Court: Hancock Superior Cc, Connection: DEF, Filed As: Smith, Ryan A.
- Section 4:** Party Name: Smith, Ryan D, DOB: 05/11/1981, Party ID: 2097877.
- Section 5:** Case ID 30D02-9712-IF-005261, Title: **St V Ryan Smith**, Offense: SEE CCS FOR OFFENSE INFORMATIONSpeed:65 Speed Zone: 55. Filed On: 12/09/1997, Status: Decided. Judicial Officer: Marshall, Dan E, Court: Hancock Superior Cc, Connection: DEF, Filed As: Smith, Ryan D.
- Section 6:** Party Name: Smith, Ryan D, DOB: 05/11/1981, Party ID: 2112599.
- Section 7:** Case ID 30D02-9905-IF-001983, Title: **St V Ryan Smith**, Offense: SEE CCS FOR OFFENSE INFORMATIONSpeed:64 Speed Zone: 50. Filed On: 05/16/2000, Status: Pending. Judicial Officer: Marshall, Dan E, Court: Hancock Superior Cc, Connection: DEF, Filed As: Smith, Ryan D.

Figure 5-1a Case Search Results Screen



### 3.2. Summary

After clicking a case hyperlink, the case Summary Tab displays a quick overview of significant case information. Click the hyperlinks to access more detailed case information. There is no data entry from this tab.

Links from the Summary tab include:

- Charges and Dispositions
- Most Recent Events and Hearings
- Case Summary (Register of Actions or Case Docket)
- Case File Location
- Flags & Actions Due

The screenshot displays the Odyssey Case Manager interface for case 30D02-0706-FD-000901. The main content area is divided into several sections:

- Case Information:** Case name "State Vs. Ryan A. Smith", Lead Attorney "Gray, Stephen Gerald", Retained "08/01/2007". Status is "Pending", Filed "06/11/2007", Type "FD - Class D Felony". Court is "Hancock Superior Court 2", Judicial Officer "Marshall, Dan E", and Financial Balance "0.00".
- Charges:** A table listing three charges:
 

Charge	Code	Date
1. OPERATING A VEHICLE WHILE INTOXICATED	(MA)	06/10/2007
2. OPERATING A VEHICLE WITH AN ACE OF .15- Same As 1140 But Where Def. Has A Prior Conviction	(FD)	06/10/2007
3. OWI WITH PRIOR OWI WITHIN 5 YEARS	(FD)	06/10/2007
- Most Recent Events & Hearings:** A list of converted events:
  - 09/10/2009: Converted Event (HEARING)
  - 09/10/2009: Converted Event (DEFENDANT'S REQUEST TO REDUCE TO AN ALTERNATE "A" MISDEMANOR SENTENCING GRANTED. BMV NOTIFIED.)
  - 08/21/2009: Converted Event (PURSUANT TO THE REPORT TO THE COURT FILED AUGUST 21, 2009 THIS CAUSE IS SCHEDULED FOR HEARING AS REPORT TO THE COURT FILED BY ADA. DM (RJO? N) | JTS Minute Entry Date: 2009-08-21)
  - 11/10/2008: Converted Event (FINES & COST)
  - 09/24/2008: Converted Event (BALANCE OF FINES AND COSTS IN THE SUM OF \$5.00 DUE NOVEMBER 10, 2008 AT 9:00 A.M. LF (RJO? N) | JTS Mr.)
  - 09/22/2008: Converted Event (FINES & COST)
  - 08/22/2008: Converted Event (CLERK RELEASES CASH BOND (395.00) TO FINES AND COSTS. TLS (RJO? N) | JTS Minute Entry Date: 2008-08-22)
  - 08/21/2008: Converted Event (FOR THE OFFENSE OF OPERATING WHILE INTOXICATED AS A "D" FELONY DEFENDANT IS SENTENCED TO 545 DAY. View more events)
- Defendant Demographics:** DOB 08/07/1983, SSN 312-02-1085, White Male.
- Case Cross Reference:** Legacy System Number D207FD00901.
- Flags & Actions Due:** A section with a link to view flags and actions due.

Figure 3-2 Summary Tab



### 3.3. Detail

Add and maintain basic case information from the Detail tab. Actions from the Detail tab include:

- *Case style (Auto)*
- *Case Assignment*
- *Case Cross Reference Numbers*
- *Update case status*
- *Enter file location*
- *Apply a case flag*
- *Add a related case*

The screenshot displays the 'Detail' tab for case 30D02-0706-FD-000901. The case title is 'State Vs. Ryan A. Smith' with a type of 'FD - Class D Felony'. The style is set to 'State Vs. Ryan A. Smith' with an 'Auto Style' checkbox. The 'Case Assignment' section shows the case number, court (Hancock Superior Court 2), date assigned (06/11/2007), and judicial officer (Marshall, Dan E). The 'Case Cross Reference Numbers' section lists a legacy system number of D207FD00901. The 'Case Status' section shows the date 06/11/2007 and status 'Pending'. On the right side, there are sections for 'Case Type' (FD - Class D Felony), 'Subtype', 'File Date' (06/11/2007), 'Security', 'Case Files', 'Case Flags', and 'Additional Barcodes'. A 'Print Label' button is also visible.

Figure 3-3 Detail Tab



### 3.4. Parties

From the Parties tab of a case record, add and maintain:

- Parties - Plaintiffs, petitioners, defendants, respondents, etc.
- Participants - Witnesses, victims, guardians, etc.
- Attorneys - For both parties and participants
- Mark party as Pro Se

Party & Attorney Information		
State Plaintiff	<a href="#">State of Indiana</a>	★ <a href="#">Chandler, Thomas Grey Augustine</a>
Defendant	<a href="#">Smith, Ryan A</a>	★ <a href="#">Gray, Stephen Gerald</a>

Participant & Attorney Information	
Miscellaneous Converted Recipient	<a href="#">Hancock County Clerk</a>

Figure 3-4 - Parties Tab



### 3.5. Cause of Action

A summary of the plaintiff, defendant, and / or participant causes on a civil or family case is displayed on the Causes tab.

Functions performed from the Causes tab include:

- Add and modify cause of action:
- Actions
- Counter Claims
- Cross Claims
- Add and modify Remedies Sought

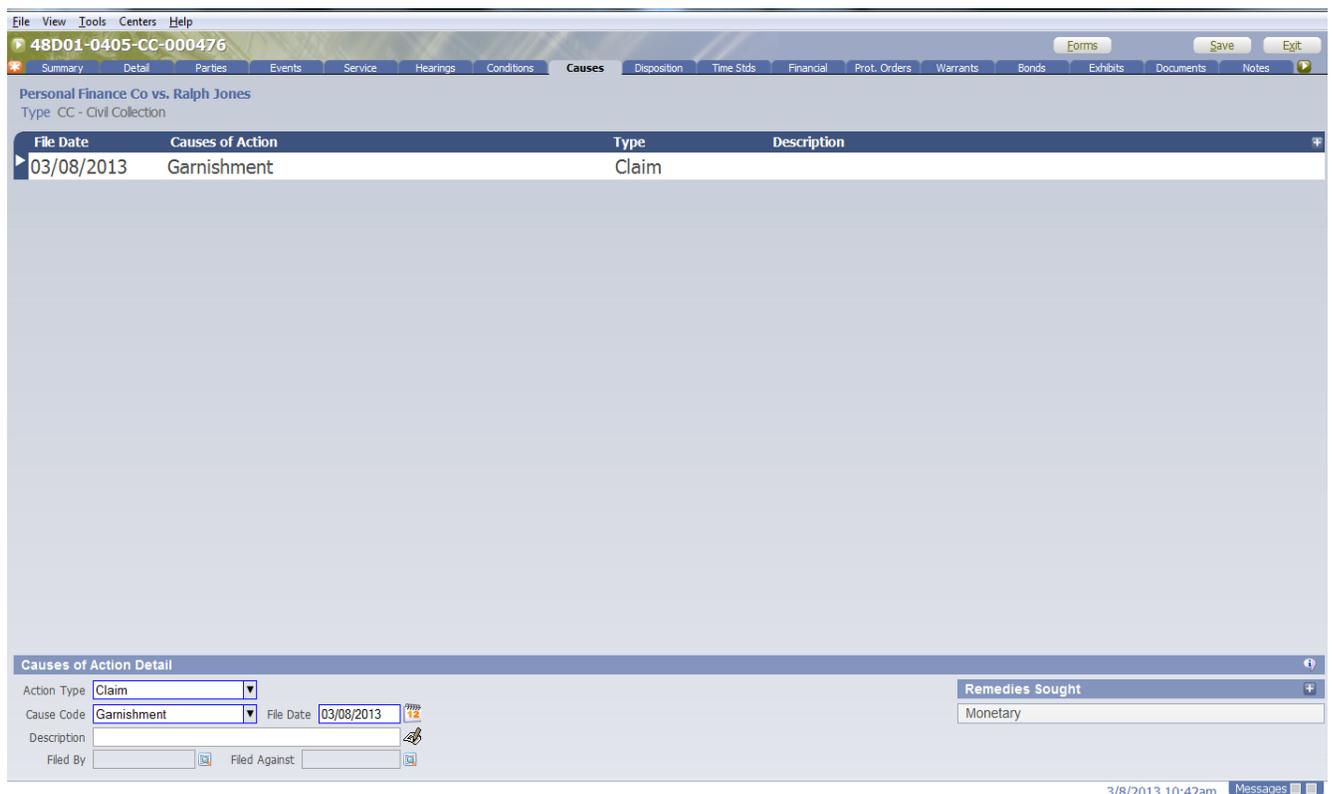


Figure 3-5 Causes Tab



### 3.6. Charges

A summary of the defendant's charges on a criminal, traffic, or juvenile case is displayed on the Charges tab.

Functions performed from the Charges tab include:

- Add and modify charge
- Amend charge
- Renumber charge
- View charge history

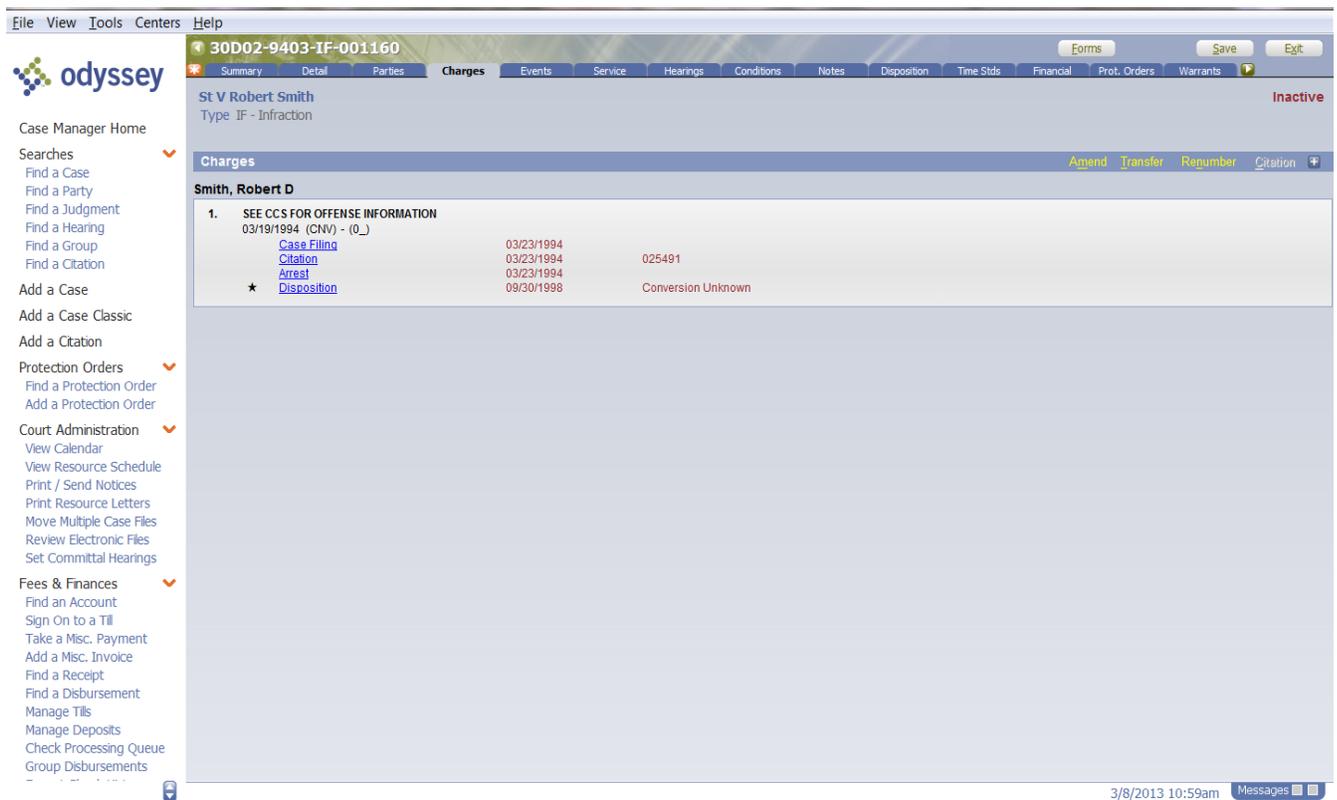


Figure 3-6 Charges Tab



### 3.7. Events

The Events tab is where all events come together to assemble the official CCS (docket) of the case.

Types of events on this tab include:

- Case events
- Hearing events
- Service events

Functions performed on the Events tab include:

- Add, view, and modify events
- Relate hearing events
- Relate case events
- Relate service events
- Modify event relationships

The screenshot displays the Odyssey Case Manager interface. The top navigation bar includes 'File', 'View', 'Tools', 'Centers', and 'Help'. The case identifier '30D02-9403-IF-001160' is shown at the top. The 'Events' tab is selected, and the case name 'St V Robert Smith' is visible. The main area contains a table of events with the following data:

Date	Type and Comment
03/23/1994	Converted Event 9-24-18-5: DRIVING WHILE SUSPENDED-INFRACTION (RJO? N)   JTS Minute Entry Date: 1994-03-23
03/23/1994	QCSR INITIAL EVENT FOR CONVERTED CASES QCSR INITIAL EVENT FOR CONVERTED CASES
03/23/1994	Converted Event Ticket filed. (RJO? N)   JTS Minute Entry Date: 1994-03-23
03/23/1994	Converted Event docket level comment: \$65 DUE 042794
04/27/1994	Converted Event DEFENDANT FAILS TO APPEAR. COURT ENTERS DEFAULT FOR THE STATE. FINES AND COSTS IN THE
06/13/1994	Converted Event CAUSE CONTINUED AND RESET JULY 12, 1994 AT 8:30A. JK (RJO? N)   JTS Minute Entry Date: 1994-0
07/12/1994	Converted Event DEFENDANT APPEARS AND REQUESTS EXTENSION OF TIME TO PAY FINES AND COURT COSTS. MOT.
10/06/1994	Converted Event DEFENDANT FAILS TO APPEAR TO PAY FINES AND COURT COSTS. BUREAU OF MOTOR VEHICLES NO
09/30/1998	Converted Event FINE AND COSTS PAID. BMV NOTIFIED. SR16 HAND DELIVERED. KP (DISPOSED: GP ) (RJO? N)   JTS
03/26/2003	Converted Event TERMINATED (RJO? N)   JTS Minute Entry Date: 2003-03-26

Figure 3-7 Events Tab



### 3.8. Service

View and maintain service tracking details from the Service tab once service is initiated. No Service events display until they are initiated from the Events tab.

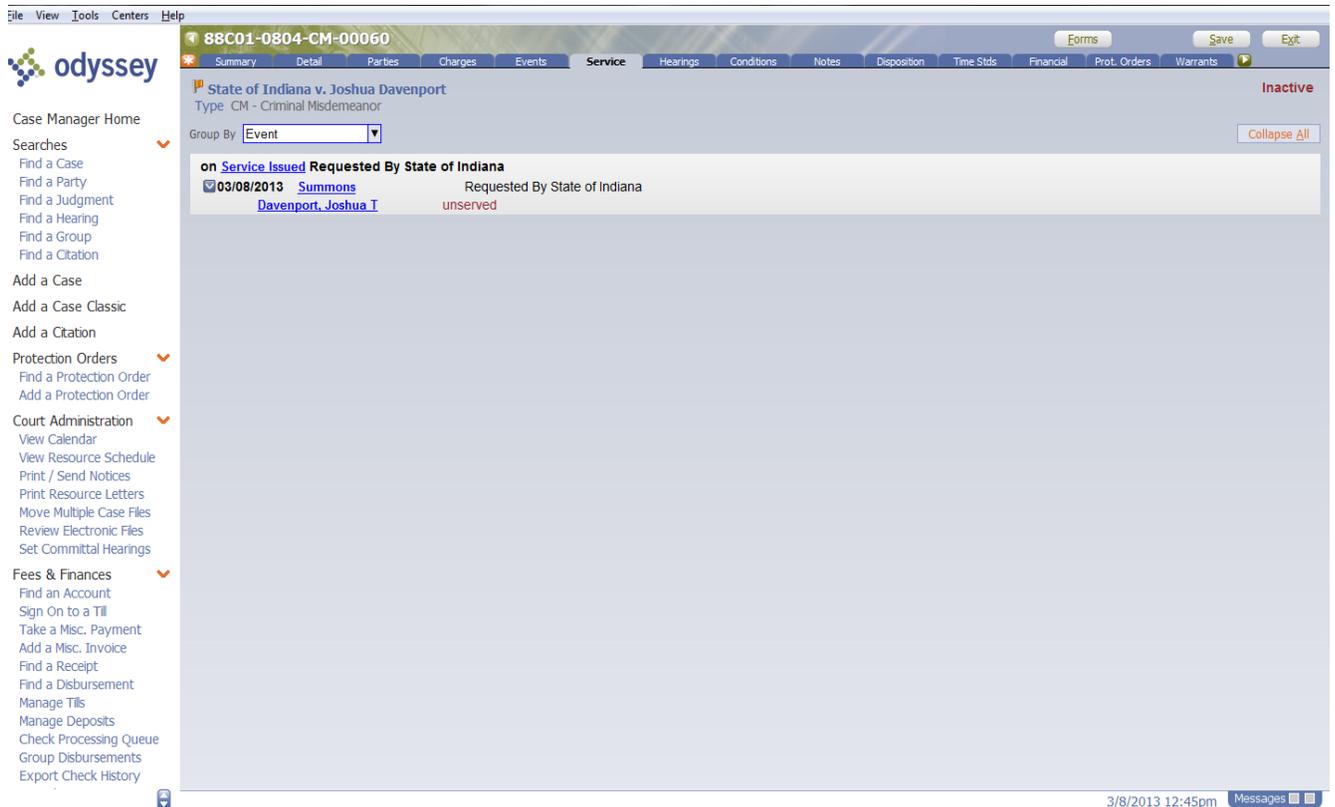


Figure 3-8 Service Tab



### 3.9. Hearings

Although hearings are events and can be viewed in the "Related Events" view on the Events tab, hearings are also displayed together on the Hearings tab.

Functions performed on the Hearings tab include:

- Add, view, modify hearings
- Reschedule hearings
- Print notices
- Enter hearing results

The screenshot displays the Odyssey CMS interface for case 88C01-0804-CM-00060. The 'Hearings' tab is active, showing a list of hearings for the case. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with a table of hearings.

Date	Time	Result
<a href="#">09/24/2009</a>	Thu 9:30 AM	Commenced and concluded ; Original Type : Hearing on Violation of Probation
<a href="#">10/01/2009</a>	Thu 9:30 AM	Continued ; Original Type : Bail Revocation/Alteration Hearing
<a href="#">10/08/2009</a>	Thu 9:30 AM	Commenced and concluded ; Original Type : Bail Revocation/Alteration Hearing
<a href="#">07/29/2010</a>	Thu 9:30 AM	Commenced and concluded ; Original Type : Initial Hearing
<a href="#">10/21/2010</a>	Thu 9:30 AM	Continued ; Original Type : Hearing on Violation of Probation
<a href="#">05/12/2011</a>	Thu 8:30 AM	

Figure 3-9 Hearings Tab



### 3.10. Warrants and Body Attachments

Access the Warrants tab to view warrants (include writs, body attachments, etc) associated with a party on the case.

Functions performed on the Warrants tab include:

- Add, view, and modify all warrants for this case
- View and modify all active warrants for the party

The screenshot shows the Odyssey Case Manager interface. The main window displays the 'Warrants' tab for case 88C01-0804-CM-00060, titled 'State of Indiana v. Joshua Davenport'. The party is listed as 'Davenport, Joshua T'. The interface shows two warrants on this case:

Case ID	Status	Issued By	Issued Date	Served Date
88C01-0804-CM-00060 - 2 Davenport, Joshua T	Served	Bench Warrant Sheriff's Office	Issued 11/16/2010 Judge Bennett, Robert L (Washington Circuit Court)	Served 05/11/2011
88C01-0804-CM-00060 - 1 Davenport, Joshua T	Served	Bench Warrant Sheriff's Office	Issued 09/17/2009 Judge Bennett, Robert L (Washington Circuit Court)	Served 09/24/2009

Below the warrants, the case details are visible: 'Case 88C01-0804-CM-00060' with charges '35-42-2-1(a)(1)(A)/MA: Battery Resulting in Bodily Injury' and '35-46-1-15.1(1)(A)/MA: Invasion of Privacy'. The 'Current Balance on Case(s)' is listed as \$3,324.00.

Figure 3-10 Warrants Tab



### 3.11. Bonds

Access the Bonds tab to view bonds associated with the party on the case.

Functions performed on the Bonds tab include:

- Add, view, and modify all bonds for this case

The screenshot displays the Odyssey CMS interface for the Bonds tab. At the top, the case number 88C01-0804-CM-00060 is visible. The case title is 'State of Indiana v. Joshua Davenport' and the type is 'CM - Criminal Misdemeanor'. The party is 'Davenport, Joshua T'. The 'Cash Bonds' section shows a 'Washington Cash Bond' for \$1,000.00, posted on 03/08/2013. Below this, two case citations are listed: '1. 35-42-2-1(a)(1)(A)/MA: Battery Resulting in Bodily Injury' and '2. 35-46-1-15.1(1)/MA: Invasion of Privacy'. The 'Surety and Other Bonds' section is empty, displaying the message 'No surety or other bonds exist for this case.' and a prompt to 'Click the Add icon to add a new bond.' The interface includes a sidebar with navigation options like 'Searches', 'Add a Case', and 'Fees & Finances'.

Figure 3-11 Bonds Tab



### 3.12. Exhibits

Exhibits and evidence are entered into the court record during a judicial proceeding and can be tracked on the case record, along with a full chain of custody.

Functions performed on the Exhibits tab include:

- Add, view, and modify exhibits for this case
- Import exhibits linked to other cases
- View and print a list of case exhibits
- Print a variety of exhibit forms

The screenshot shows the Odyssey Case Manager interface. The top navigation bar includes 'File', 'View', 'Tools', 'Centers', and 'Help'. The main content area displays the case details for '88C01-0804-CM-00060' and 'State of Indiana v. Joshua Davenport'. The 'Exhibits' tab is active, showing a table of exhibits. The table has columns for 'Exhibit ID / Exhibit #', 'On Behalf Of / Status', 'Location', 'Type / Description', and 'Mark All'. A single exhibit is listed with ID '1', 'Victim' status, and 'photo's of victim's injuries' description. The sidebar on the left contains various navigation options such as 'Searches', 'Add a Case', 'Protection Orders', 'Court Administration', and 'Fees & Finances'. The bottom right corner shows the date and time '3/8/2013 12:49pm' and a 'Messages' icon.

Figure 3-12 Exhibits Tab



### 3.13. Disposition

For Civil Cases, enter and amend dispositions for all Causes of Action on the case from the Disposition tab.

For Criminal Cases, record pleas, dispositions, and sentences.

Functions performed on the Disposition tab include:

- Add, view, and modify judgments and dispositions for each Cause of Action
- Amend judgments and dispositions
- Update the case status

The screenshot displays the Odyssey Case Manager interface. The top navigation bar includes 'File', 'View', 'Tools', 'Centers', and 'Help'. The main menu has tabs for 'Summary', 'Detail', 'Parties', 'Charges', 'Events', 'Service', 'Hearings', 'Conditions', 'Notes', 'Disposition', 'Time Stds', 'Financial', 'Prot. Orders', and 'Warrants'. The 'Disposition' tab is selected, showing the case 'State of Indiana v. Joshua Davenport' with a status of 'Inactive' and a 'Case Close' button. Below this, there are sections for 'Statistical Closure' (07/30/2009 Other) and 'Case Status' (09/26/2011 Decided). The 'Charge Disposition' section lists two charges: '1. 35-42-2-1(a)(1)(A)MA: Battery Resulting in Bodily Injury' and '2. 35-46-1-15.1(1)MA: Invasion of Privacy'. Each charge entry includes a table with columns for 'Judgment' and 'Sentence', and a detailed description of the disposition, including dates, terms, and suspensions.

Figure 3-13 Disposition Tab



### 3.14. Financial

Access financial information for all the parties on the case, including both case fees and trust accounts.

Functions performed on the Financial tab include:

- View a summary of all financial accounts for all parties on the case
- Assess fees
- Add payments and credits
- Make adjustments
- Maintain trust accounts

The screenshot displays the Odyssey CMS interface for the Financial tab. The case title is "State of Indiana v. Joshua Davenport" with a type of "CM - Criminal Misdemeanor". The status is "Inactive". The interface includes a navigation menu on the left with categories like "Case Manager Home", "Searches", "Add a Case", "Protection Orders", "Court Administration", and "Fees & Finances". The main content area shows a table of financial data for the defendant, Joshua T. Davenport.

Party/Financial Category	Current Due	Total Balance	Escrow Balance	Last Activity
<b>State Plaintiff</b>				
<b>Defendant</b>				
Davenport, Joshua T				
Case Fees - Other	3,324.00	3,324.00	0.00	10/01/2009 Disbursement <a href="#">Sent to Collection Agency (Warn)</a>
Cash Bonds		0.00	1,000.00	03/08/2013 External Transaction
Registr and Trust		0.00	0.00	
<b>Prosecutor</b>				
<b>Victim</b>				
<b>Probation Department</b>				

At the bottom of the interface, the date and time are shown as 3/8/2013 12:51pm, along with a Messages icon.

Figure 3-14 Financial Tab



### 3.15. Forms

Modify, view, and print case forms from the Forms button.

Functions performed using the Forms button / Select Document dialog box include:

- View and modify case documents
- Print forms

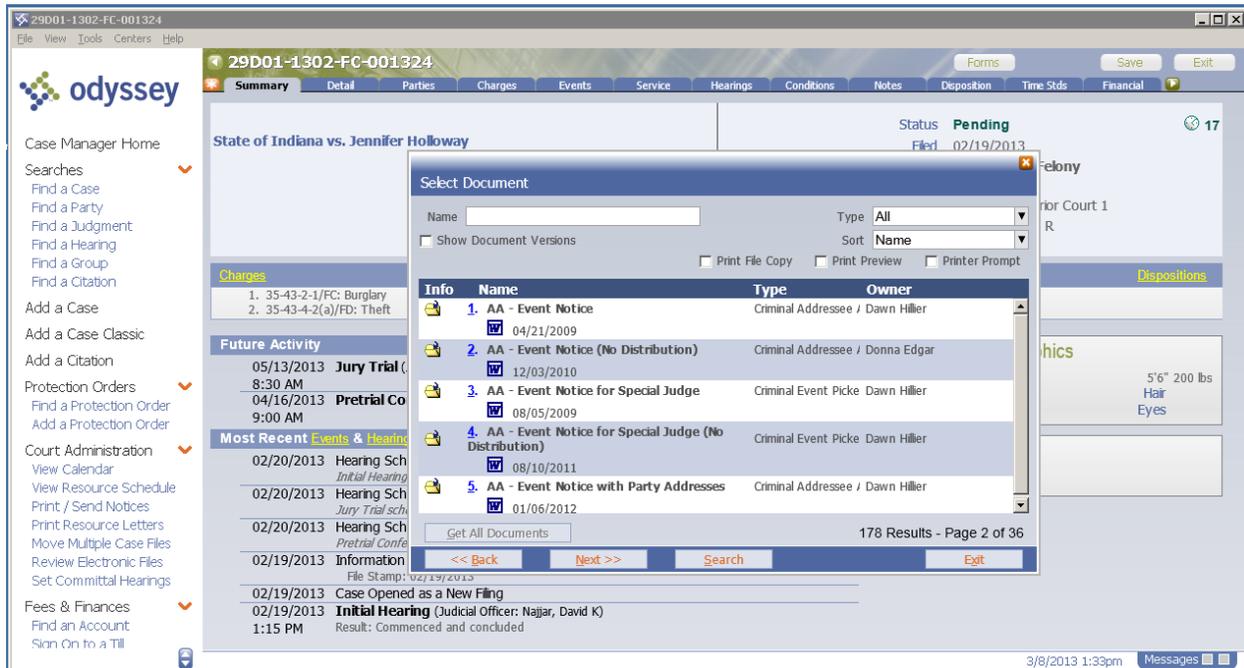


Figure 3-15 Forms Tab



## 4. Finding a Hearing and Viewing Calendars

Detailed Calendar information will be covered in separate modules.

### 4.1. Finding a Hearing

From the left side navigation menu:

- Click on **Find a Hearing**



- The **Find a Hearing** screen appears.

- The options to the right side of the Find a Hearing window allow you to choose how you want to search for the hearing. The most common way to search is by entering the party or business name. You also have the option to search by case number.

- If you wish to narrow your search even further, click on **advance search** for more options. **\*\*Note!** If you narrow your search too much, such as

include a DOB (Date of Birth), your results will return only those parties that have the same date of birth that you're searching on.



- After entering your search criteria, click **Search**.

**Find A Hearing** Search Clear Exit

**Search by Hearing Information**  
 Today and Future Only  Date Range  
Hearing Date [12/12] Thru [12/12]

**Search by Case Information**  
Case Number [ ]  
Cross Ref [ ]

**Search by Party Information**  Use Soundex  
 Person  Nickname  Business  
Last Name **Stewart**  
First & Middle **Ralph**  
Date of Birth [ ] Death [ ]

**quick links**  
▶ Case History  
▶ Save My Settings  
▶ Use Advanced Search

**search options**  
 Include Inactive Cases  
 Include Hearings with Results  
Show 10 Matches Per Page

**case categories**  
 Crim-Juv-Traffic  
 Civil

- Your results will be displayed as seen below.

**Search Results** Back Next Refine Exit

**STEWART, RALPH W** DOB 11/02/1941 DL IN-8943652607 Party ID 24922742

**42D02-1401-IF-000207** **State of Indiana vs. RALPH STEWART**  
9-21-5-2/IFC: Speeding  
Offense Date: 01/18/2014 Degree: IFC

Filed On 01/24/2014 Judicial Officer Osborne, Jim R  
Status Decided Court Knox Superior Court Connection DEF  
Attorney Filed As STEWART, RALPH

Community of Offense County

Type **Admission Hearing** Judicial Officer Osborne, Jim R  
Date **03/06/2014 09:00 AM** Location Knox Superior Court 2

*Note: Clicking on a hearing in the search results of Find a Hearing will take you to the court session in that calendar.*

## 4.2. Introduction to Calendars

**Hearings** are proceedings in which arguments, witnesses, or evidence is heard by a judicial officer (e.g. judge, child support magistrate, etc.).

A **Calendar** is a logical grouping of all Court Sessions that have been defined. A calendar summarizes the matters that can be scheduled into the court sessions.

**Court sessions** are blocks of time defining the nature of court business to be used for scheduling events.

An example of a court session would be:

- Arraignment session
- Civil Special Term session



There are several ways to view the calendars and resources in Odyssey in the Court Administration Page:

- Click **View Calendar** under Court Administration in the Navigation Menu

If this is the first time a calendar has been accessed, the Select Calendar Dialog Box appears (Figure 4-2).

- Select the **View** (weekly or monthly) from the drop-down box.
- Click  to the right of the Owned by Location field and *choose* the **calendar** you would like to view.

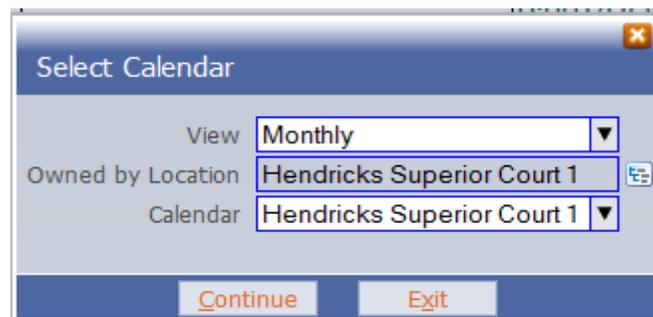


Figure 4-2 Select Calendar dialog box

### 4.3. Monthly View

The monthly view of a court calendar shows four weeks of sessions at one time. The top of the page displays:

- The name of the calendar being viewed
- The month(s) displayed
- Court owning and maintaining the calendar.





#### 4.4. Monthly View -Calendar Icons

Each day in the monthly calendar shows:

- The time for when a session is scheduled
- The type of session
- How close to capacity it is.

Wednesday	Thursday
6 8:00 Hearings/Trials 23h, 30m of 8h 9:00 BROWNSBURG SCHOOLS 58 of 75	7 8:00 Hearings/Trials 27h of 8h 

Figure 4-4 Day within the Calendar

- To view or schedule a hearing, simply *click* once on a court session.

Within each day of the monthly calendar view, there are four icons:

-  Expand: when there are more sessions than can be displayed in the standard size calendar block for a day.
-  Contract: truncates the view to fit the calendar in the window.
-  Warning / Reminder: displayed if a session needs to be reviewed. (For example, it displays if at least one of the hearings in the session has the flag "Interpreter Required".)
-  Go to 5-day view: zoom the calendar to 5-day view.

#### 4.5. Calendar Capacities

In the monthly view, court session text is displayed in different colors to easily tell the capacity status:

- **Green** court sessions are available for scheduling hearings (e.g.: 0 of 100)
- **Black** sessions are full or closed (e.g.: 100 of 100, or manually closed by the calendar's administrator)
- **Red** sessions are over capacity (e.g.: 6 of 5)
- **Blue** sessions are unavailable for scheduling (for example, a holiday)



## 4.6. Calendar Icons

Change the view of the calendar by *clicking* the **icons** in the calendar header:



 Print the calendar or resource schedule.

 Go to another date. *Click* the **icon** and *type* the **date** or select using calendar icon in the Go to Date Dialog Box when it appears. *Click*  and the date you would like to view appears.

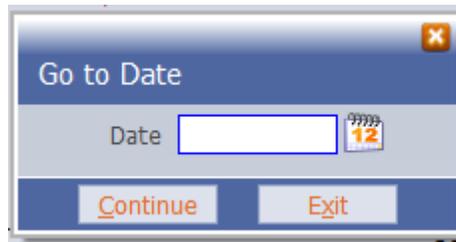


Figure 4-6 Go To Date Dialog Box

 View a monthly calendar with the current day displayed in the first week.

 Go to the monthly calendar view.

 Go to the weekly calendar view.

 Allows you to select specific non-sequential days to view in a calendar.

 Display the previous day's column

 Display the next day's column

 View the previous four weeks

 View the next four weeks

## 4.7. Calendar Buttons

Change the calendar view and how it is displayed by using these buttons:



- Preferences- Choose how you would like the calendar to display.
- Calendar- Choose which calendar displays.
- Refresh- Update the calendar information with new data.

#### 4.7.1. Preferences

Sets preferences for which calendar is displayed and how it is launched each time the user accesses View Calendar or Resource.

Odyssey remembers the preference settings each time the Calendar or Resource is launched until the settings are changed.

- Click  to access the User Preferences dialog box (Figure 4.7.1). There are two settings to choose from on the User Preferences dialog box:
  - Use Last Calendar
  - Always Start With

Selecting the Use Last Calendar option defaults the calendar to start using the view preferences last accessed each time the calendar is entered. The preferences choices listed in the dialog box are disabled with this option.

Selecting the Always Start With option will default the calendar or resource to always start with the options chosen below:

- **View:** choose either Weekly or Monthly.
- **Owned by Location:** with appropriate rights, select the court location.
- **Calendar:** with appropriate rights, select the name of the calendar or resource to display.

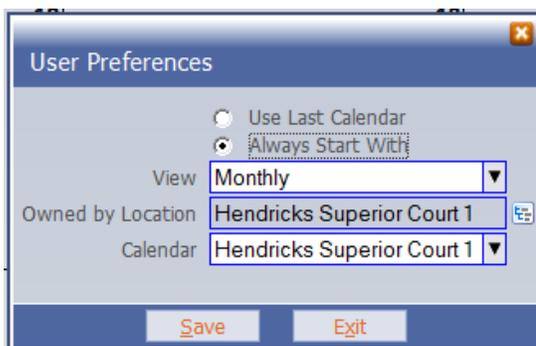


Figure 4-7-1 User Preferences dialog box

- Once you have set your Preferences, click  to save the preferences and return to the Calendar page.

#### 4.7.2. Select Calendar

Allows you to select another Calendar or Resource Schedule to display.



- Click **Calendar** to access the Select Calendars dialog box (Figure 6-6).

In the Select Calendar dialog box, choose the new calendar to display by changing:

- **View:** choose either Weekly or Monthly.
- **Owned by Location:** with appropriate rights, select the new court location.
- **Calendar:** with appropriate rights, select the name of the calendar or resource to display.

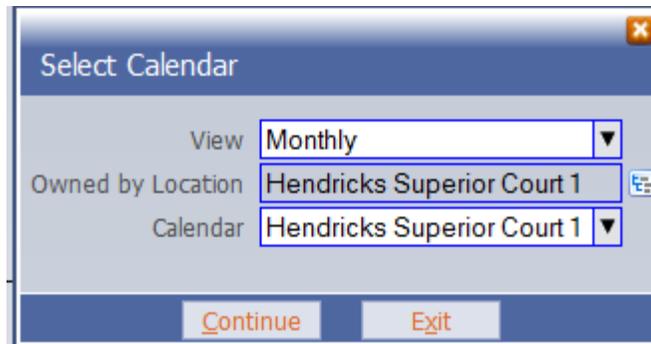


Figure 4-7-2 Select Calendar Dialog Box

- Once you have set your Preferences, click **Save** to save the preferences and return to the Calendar page.

#### 4.7.3. Refresh

- Click **Refresh** to update the sessions and refresh all of the scheduled items on a calendar.

Refreshing the calendar after adding sessions will update the information for everyone accessing the calendar.

Get into a habit of regularly hitting the Refresh button when there are several people in a court, office, or district adding court sessions and hearings to a calendar.



## Appendix: Case Manager Basics

### Logging On to Odyssey

1. Double-click the **Case Manager Icon**.
2. Type your **User ID** and **Password**.
3. Click the **Sign-on** button.