SessionWorks Judge Edition - Quick-Reference Guide

1 Starting a Court Session

On the **Case Nav** pane, the **Start Court** button works in conjunction with the **Ready** folder. Tapping **Start Court** opens the next case in the order that cases were placed in the **Ready** folder.

To start a court session:

1. Tap 

 to open the next case in the **Ready** folder.
2. Work the open case as needed.
3. Mark the open case complete by tapping 

, which moves the case into the **Complete** folder.

   The next case in the **Ready** folder opens automatically.

2 Configuring the Home View

In order to set up **Auto-Replace Text**, navigate to the following location, or consult your local support staff:

1. Click the **Auto-Replace** button.
2. Type the shorthand text on the left-side in the **Typed Text** column.
3. Type the replacement text in the right column.
4. Click the **ADD** button.
5. Click the **SAVE** button, and restart the application.

3 Session Manager Action Menu Options

The Session Manager page layout has been updated in version 4.0.

The **Action** menu wheel that was in previous releases has been removed. The options formerly on the **Action** menu wheel are now displayed as buttons on the *Session Manager* page. Clicking one of the buttons will display the list of options for that button.

The new Session Manager **Action** menu options are as follows:

- **Group Hearings** – Replaces the paperclip option in previous releases. Clicking the **Group Hearings** icons gives you the option to group selected cases together or ungroup cases.
- **Move To Folder** – Replaces the **Set Status** option in previous releases. Clicking the **Move To Folder** option opens a dialog box so you can place the current case into a work folder.
- **Change Position** – Replaces the move functionality. Moves the selected case up and down or first and last in the list of cases.
- **View Cases** – Functions the same as in previous releases. It has been moved from the third column to the fourth column. Clicking **View Cases** opens a specific entry in the list of returned matches that meet your search criteria. Click the **View Case** button on a case to view details about the case.

Note: Right-clicking on a case will display a list of case options available.

4 Adding a Case Note

The **Add Case Note** icon is on the **Case Details** pane.

The figure shown illustrates the **Case Details** pane on an open case.

To add a note to an open case:

1. On the **Case Details** pane, tap to open the notepad.
2. Type note text.
3. If appropriate, set a note type (important, private).
4. Tap **Save Note**.

5 Deleting a Case Note

Only the originating author can delete a note. Reference the audit information for the name of the author and request the author delete the note. Once deleted, a note is gone forever. There is no way to get it back.

To delete a note, the author does the following from the note list:

1. Tap the white oval **X** button to display the red **Delete** button.

   Note: To cancel the delete operation before you tap Delete, tap the oval X button again.

2. Tap the **Delete** button.

   The deleted entry is no longer in the note list.

6 Adding a Page Note

A note can be added for a one-page document.

To add a note for a one-page document or the page open in the **Viewer**:

1. On an open document, use the page-to-page icon to move to a specific page.
2. Tap to open the notepad.
3. Type the note text.
4. If appropriate, set a note type (important, private).
5. Tap **Save Note**.

Note: Deleting a page note uses the same rules followed to delete a case note.

7 Searching for a Note

A search looks at the currently open case or the cases linked with a paper clip.

To find a specific note:

1. In the **Search** text box, type the text you wish to find.

   The result is a filtered list of the notes that have a text match.

2. Tap **Clear** to return to the note list.

8 Editing a Page Note

Page notes can be edited.

To edit a note:

1. Tap a page note marker.
2. Tap the **Edit** button, or tap the marker to close it.
3. Add, edit, or remove text.
4. Tap **Save Note**.

9 Opening Existing Case Notes and Page Notes

Notes on a case can be opened from the **Case Nav** pane.

To open the list of the notes on an open case:

1. Tap the **Notes** on the **Case Nav** pane.

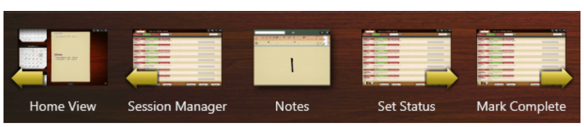


Figure 9.1 – Case Nav Pane

   The list of the notes opens. A page note entry includes a document icon that you can tap to open that note on the document page.

   Each note entry has audit information of author name, date, and timestamp.

2. On the note list, tap a note entry to open it.
3. Work the note as needed: edit, change to private, or delete (if original owner).

10 Assigning a Note to Cases in a Group

Adding a note to a case linked with other cases in a group attaches this note to all of the cases in the group. Only one note, and only one version of that note, can attach to the notes in a group. Any edits made to the note applies to all cases in the group.

To add a note to only one of the grouped cases:

1. On the notepad, tap the **Cases** button to open the *Choose Case(s)* dialog box.

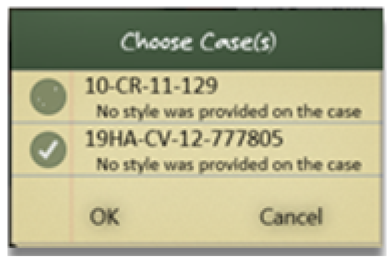


Figure 10.2 – Case Notepad Listing Cases in a Paper Clip

2. On the *Choose Case(s)* dialog box, tap the circle of each case to attach to the note.

   Tapping a circle sets a check mark on the selected case.

3. Tap **OK**.

To unlink a case from a note:

1. On the notepad, tap the **Cases** button to open the *Choose Case(s)* dialog box.
2. Clear the check mark from case that you want to remove from the note.
3. Tap **OK**.

11 Viewing a Case File

Case files can be viewed in Session Manager from the **Action** menu.

To open a case from the **Action** menu:

1. In Session Manager, tap the case to be viewed.
2. Tap the **View Case** button, , to open the selected case.

12 Placing Cases into Folders

Folders are opened by tapping its tab. When a folder is open, its tab is in the top left corner of the desktop.

To place cases in folders:

1. Tap the **Move To Folder** button .
2. Tap the name of the destination folder.

Note: Placing a case into a folder does not change the status of the case in Odyssey.

13 Grouping and Ungrouping Cases

When cases upload from Odyssey to Judge Edition, related cases are automatically fastened together.

When cases are grouped together, it indicates one of the following:

- Multiple criminal cases for the same defendant in the same session
- Non-criminal cases with multiple hearings in the same session

To group several cases together:

1. On the *Session Manager* page, tap each individual case to select it. Each case selected is highlighted.
2. On one of the selected cases, tap .
3. Tap **Group Hearings**.

To ungroup documents from a paper clip:

1. Tap the group fastened together with a paper clip.
2. On one of the cases, tap .
3. Tap **Ungroup Hearings**.

14 Handling Documents

There are several ways to handle documents in Session Manager.

To open a document:

1. Scroll through **Hearing Documents** or other attached documents.
2. Tap a document to open it in the **Viewer**.

To open a different document, go to the **TOC**; tap **TOC** if needed.

15 Hearing Documents and Table of Contents

The **Hearing Documents** pane and the **TOC** pane below it, scroll independently of each other.

You configure the most commonly referenced documents to list in the **Hearing Documents** pane. The **TOC** contains a thumbnail of each document on the case

Note: Some documents will appear under the Hearing Documents section by default, with no configuration required. Any document attached to the current hearing will display under Hearing Documents. Also, documents attached to an event that is related to the current hearing will appear under Hearing Documents by default. This includes documents attached to a child event of an event related to the current hearing.

To hide or show the **Hearing Documents** pane, tap the **Hearing Documents** label.

To review the documents attached to a case:

1. Scroll through **Hearing Documents** or other attached documents.
2. Tap the document to open it in the **Viewer**.

16 Resources

Each resource label lists the resource codes initially defined in Odyssey Court Administration, Court Administration Setup, Court Administration Codes, and Judicial Officers. The resources on a case come from an Odyssey Case Manager session downloaded to Judge Edition. In **Resources**, you set the entries that you want by resource type. Any configuration change requires a restart of Judge Edition.

To configure a resource type:

1. For each resource type that you want to configure, tap its label and select an entry.
2. Tap **Save**, which automatically restarts the Judge Edition application.

   Cancel closes **Configuration** and opens **Home View**.

17 Inserting a Bookmark

Users can insert a bookmark on a page to view later at a later time.

To insert a bookmark:

1. Scroll to a page on which you want to apply a bookmark.
2. Tap  to open the **Bookmarks** bar.

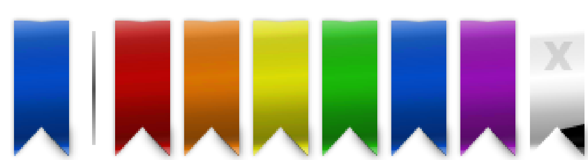


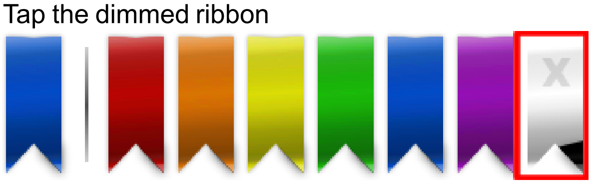
Figure 17.3 – Bookmarks

3. Tap the bookmark color that you want to insert.

18 Removing a Bookmark

A bookmark can be removed from a page in a document.

To remove a bookmark:

1. Scroll to the appropriate bookmarked page.
2. Tap  to open the **Bookmarks** bar.
3. Tap the dimmed ribbon  to remove the bookmark.

19 Retrieving a WALK IN Case

Whenever a person wants to address a case not scheduled on the court's calendar, this case is referred to as a walk in.

To work a walk in case requires retrieving its case file from the Odyssey database.

Note: Retrieving a case number does not list the case on the session within Odyssey Case Manager.

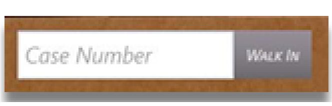


Figure 19.4 – WALK IN Search Field

To retrieve the Odyssey case file for a WALK IN case:

1. In the **WALK IN** field provide the Odyssey case number of the file, either by:
   - Typing the case number, or
   - Positioning the cursor in the **WALK IN** field and scanning the barcode on the outside of the physical case file.
2. Tap **WALK IN**.

   Matching on a partial case number, such as 01389, retrieves all cases that match the entered characters as you type. A dialog box opens with the match results for you to select the case.

20 Searching Within a PDF Document

Judge Edition allows the ability to perform a text search within a PDF document.

To perform a search within a PDF document that has searchable text:

1. At the top left-side of the pdf document displayed, click . The *Search* dialog box will be displayed.
2. Enter text in the **Search** field. A list of search results will be displayed with the page number shown on the right-side.
3. Click the **Previous** or **Next** button to scroll through the list of search results.
4. Click **Clear** to start a new search.

21 Sending a General Docket Entry

Perform the following steps to send a general docket entry:

1. In the **Case View**, select the file folder on the bottom left of the case details view.

   The *General Docket Entry* editor will appear on the bottom-left side of Judge Edition.

2. Use the editor to begin typing the text you want to send for the general docket entry.
3. Once the editing of the general docket entry is complete, click the **Send** button to email the general docket entry to the *Case Management System*. If you want to save it for later, click **Save Draft** to save the general docket entry.

22 Typing a Sticky Note on the Outside of a Case File

In Session Manager, the note sheet  is the electronic version of the paper sticky note placed on the outside of a case folder. A sticky note is only relevant to the current hearing; therefore, it does not persist to future hearings.

Linking several cases with sticky notes in a paper clip results with all but one sticky note deleted.

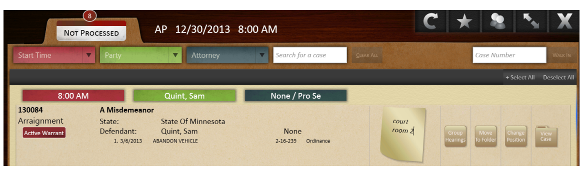


Figure 22.5 – Sticky Note on a Case File

To add a sticky note:

1. Tap  to open the note sheet.
2. Type your text.

   When finished typing, move the cursor out of the sheet and continue on with your work.

23 Using Start Time, Attorney, and Defendant to Retrieve Matching Cases

The fields immediately under the open folder tab give access to drop-down lists from which you set the criteria to search and list in Session Manager.

Select an entry from one or all of these fields.

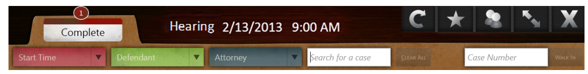


Figure 23.6 – Search Criteria Fields

To search for cases using the search criteria fields:

1. Tap the triangle on a search field to open its drop-down list.
2. Select the appropriate entry.

   Each selected entry refreshes the search criteria and adjusts the cases list accordingly on Session Manager.