



SessionWorks Judge Edition

User Guide — Release 4.0

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Technical Assistance

For assistance, contact Tyler Technologies through the following resource numbers.

Technical Assistance	Contact Information
Main (Reception) Telephone	972.713.3770
Main (Reception) Fax	972.713.3777
Courts & Justice Client Support Phone	800.966.6999 or 877.874.8499
Courts & Justice Client Support Fax	972.713.3780
Courts & Justice Client Support Website	tylertech.com/client-support/courts-and-justice-support
Courts & Justice Technical Publications	planodocfeedback@tylertech.com
	tylercommunity.tylertech.com

About this Guide

Tyler Technologies designed the Odyssey SessionWorks Judge Edition application to enable courts to go paperless. Achieving this goal meant replicating the functionality associated with a paper file folder with the documents and information contained therein. Information must be available to the judge when needed and presented and maintained by a methodology of expediency.

Audience

Odyssey SessionWorks Judge Edition serves the following three audiences: judges, courtroom clerks, and attorneys. As a general rule, judges and clerks can perform the same activities. However, attorneys can only display a data view of cases and documents; they cannot use notes or bookmark documents.

Judges primarily use the application as a portal into a case where they perform the following main activities:

- View case summary information
- View party summary information
- View documents associated with a case
- Organize cases according to how the session is to flow
- Attach key information on documents and pages using notes
- Bookmark key pages in documents that require attention

Courtroom clerks use the application to organize cases and sessions for presentation to the judge. Clerks generally perform the following activities:

- Arrange the cases in the session for presentation to the judge
- Add notes to convey information to the judge
- Bookmark certain pages for a judge to review

Content Organization

SessionWorks Judge Edition provides the functions needed to handle case information during court sessions. The chapter headings in this guide reflect these functions. Each chapter contains the instructions for its associated subtasks. The last chapter, "Navigation Controls," serves as a quick reference for how to move about and perform selected activities.

Documentation Conventions

This section describes the conventions used in documents published by the Tyler Technical Publications Department. The format style applied to text enables readers quickly to determine the nature of information or an action they are to take

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Text Style	Description	Example
Bold	Shorthand notation for a menu, menu item, optional cascading menu, or selected tab Objects to click/select—button, check box, options in a drop-down list, element/field, panel, pane, and section header name	Go to Tools > Options > Forms . Click License Key Editor .
Fixed-Width	Server names, filenames, pathnames, foldernames, API names, XML settings in configuration files, databases, command names, system calls, and data structures and types	Run the <code>tables.sql</code> script for the <code>jcpBasketB</code> database.
Fixed-Width bold	Input typed exactly as shown on a command line or within a configuration file	Set the value as <code>\Odyssey\Prod\Configs</code> .
<i>Italics</i>	Variable data to be replaced by an appropriate value Document titles Page and dialog box names	Type the <i>filename</i> . Refer to the <i>Deployment Troubleshooting Guide</i> . On the <i>Settings</i> dialog box, click OK to open the <i>Styles</i> page.
“Quotation marks”	Software right Section within a document	Feature requires the “Print the Event Listing Report” right. Refer to the “Planning a Deployment Mode” section.
[Brackets]	Indicates optional items in a syntax line that the user must type	Set this connection value, <code>Set database = OpenDataBase (dbname[, reserved[, read-only[, connect]])</code> .
User input	UI input typed exactly as shown	Type the value <code>Boston</code> in the city field.

Documentation Icons

Each documentation icon flags a type of information or an action of importance.

Icon	Description
	This icon flags notes that provide extra details about a topic or step.
	This icon flags caution messages that indicate a specific action could cause an error in the system.
	This icon flags warning messages that indicate a specific action could cause an interruption of service.
	This icon flags danger messages that indicate a specific action could damage the database infrastructure or hardware.

Contents

Copyright and Confidentiality	ii
Publication History	ii
Technical Assistance	ii
About this Guide	iii
Audience	iii
Content Organization	iii
Documentation Conventions	iv
Documentation Icons	v
List of Figures	viii
1 SessionWorks Judge Edition Overview	1
2 New Features and Functionality	2
Session Manager Action Menu Options	2
Related Cases Indicator	3
Search and Navigate PDF Documents	4
Searching Within a PDF Document	4
Navigating a PDF Document Search	5
Summary of Bookmarked Documents	6
Add Collection Status to ROA	7
Custody Status	7
3 Navigation Controls	10
Scroll Bar Navigation	10
Touch Gestures	11
Keyboard Controls	11
Find a Case Navigation	12
Session Manager Filters	13
Case Activities Navigation	14
Document and Page Controls	16
Notes Shortcuts	17
4 Signing On	18
Signing On	18
5 Refresh Functionality	19
Refresh Buttons	19
6 Calendars and Scheduled Sessions	20
Home Page	20
Home Page Buttons	21
Group Navigation	21
Monthly and Daily Calendars	22
Filter Sessions by Resource in Home View	24
7 Cases and Folders	25
Session Manager Updates	25
Filter & Search Across Folders in Session Manager	26
Cases and Folders	26
Case Flags	27
Session Manager Folders	27
Placing Cases into Folders	28
Grouping and Ungrouping Cases	28
Searching for a Case	29
Using Start Time, Attorney, and Defendant to Retrieve Matching Cases	29
Using Session Manager Case Details Information to Retrieve Matching Cases	29
Retrieving a WALK IN Case	30
Typing a Sticky Note on the Outside of a Case File	30
Viewing a Case File	31
Case Nav Pane	32
Case Details	33

	Hearing Documents and Table of Contents	34
	Print Multiple Documents	35
	Related Cases	36
8	Documents on a Case	38
	Handling Documents	38
	Odyssey Document Security Model	39
	Paging	39
	Zooming and Panning	39
	Open Another Document	40
	Download Documents	41
	Print Documents	42
	Copy Text From a Document	43
	Bookmark Pages of Interest	44
	Inserting a Bookmark	44
	Removing a Bookmark	44
9	Notes	45
	About Note Types	45
	Case Notes	45
	Adding a Case Note	45
	Assigning a Note to Cases in a Group	47
	Working Notes from the Note List	47
	Opening Existing Case Notes and Page Notes	47
	Searching for a Note	48
	Acknowledging a Note	49
	Deleting a Case Note	49
	Undocking, Moving, Resizing, and Docking the Note List	49
	Leaving Notes	50
	Page Notes	50
	Adding a Page Note	51
	Opening a Page Note and Moving the Marker	51
	Editing a Page Note	52
	Marking a Page Note as Important	53
10	Start and End a Court Session	54
	Starting a Court Session	54
	Ending a Court Session	54
11	Judge Edition Configuration	55
	Access to Configuration	55
	Judge Profiles	56
	Configuration Features	57
	Toggle Paper Clipping	58
	Sticky Notes	58
	Change Download Window	59
	Notes	59
	Options	59
	Defining Replacement Text for Shorthand Codes Used in Notes	60
	Resources	60
	Document Category Configuration	61
	Set Up a Document Group Category	61
	Mapping Hearing Document Types to Your Group Categories	63
	Case Detail	64
	Connections	65
	About	65

List of Figures

SessionWorks Judge Edition Sign-On Screen	1
New Action Menu Format	2
Session Manger Action Menu Options	3
Related Cases Indicator	4
Search in PDF Document	5
Navigate PDF Search Results.....	6
Summary of Bookmarked Pages	7
Session Manager.....	8
Case Details.....	8
Register of Actions.....	9
Scroll Bars.....	10
Filter Functionality.....	13
Filter Bread Crumbs	13
Odyssey SessionWorks Judge Edition Sign-On Screen	18
Home – Action List.....	20
Group Navigation Control	22
Home – Day View	22
Home – Day View	23
Filter Session by Resource	24
Session Manager.....	26
Filter and Search Across Folders.....	26
Session Manager – Not Processed Folder	27
Case Flags.....	27
Cases Fastened with a Paperclip	28
Search Criteria Fields.....	29
Session Manager Case Details Information.....	29
Search Text Box	30
WALK IN Search Field.....	30
Sticky Note on a Case File.....	31
Viewing a Case File	32
Case Nav Buttons.....	32
Case Details Pane in Case View	33
Internet Favorites.....	34
Configurable Internet Favorites – Add a Bookmark	34
Case View.....	35
Print Multiple Documents	36
Related Cases Combo	36
Related Cases.....	37
Multi-page Document with Document Viewer Controls	38
Open a Second Document.....	40
Two Documents Side by Side.....	41
Print Document.....	42
Print Options Dialog Box.....	43
PDF with Image Tools Menu	43
Bookmarks.....	44
Case Details Pane on an Open Case.....	46
Case Notepad – Add a Note	46
Case Notepad Listing Cases in a Paper Clip	47
Case Nav Pane	47
List of Case Notes on an Open Case	48
Search Text Box on the Note List.....	48
Note List Refreshed with the Results of the Search	48
Deleting a Note	49
Case Nav Pane	50

Document with Page Note Button	50
Page Notepad	51
Marker Tapped to Edit Note.....	52
Page Note Set as Important.....	53
Home View	55
Configuration Page	56
Judge Profile–Document Groups.....	57
Table of Contents List View	58
Customizable Case Details	58
Download Window	59
Notes Set as Private by Default Dialog Box	60
Note Replacement Text Dialog Box	60
Resources Tab, Judges Label	61
Documents Groups Category Dialog Box	62
Document Configuration Warrants Group.....	63
Final Categories on Case View Page.....	64
Case Detail Label.....	65



1 SessionWorks Judge Edition Overview

SessionWorks Judge Edition integrates with Odyssey Case Manager. In Odyssey Case Manager, clerks create sessions and schedule hearings ready for downloading to a SessionWorks workstation. Generally, the main computer that receives the data updates for a courtroom is the one running on a judge's bench. The computers located in the judge's chamber and/or on the clerk's bench automatically synchronize with the main computer.



Figure 1.1 – SessionWorks Judge Edition Sign-On Screen

2 New Features and Functionality

Topics Covered in this Chapter

- ◆ Session Manager Action Menu Options
- ◆ Related Cases Indicator
- ◆ Search and Navigate PDF Documents
- ◆ Summary of Bookmarked Documents
- ◆ Add Collection Status to ROA
- ◆ Custody Status

This chapter describes new features and functionality added to Judge Edition since the previous release.

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.

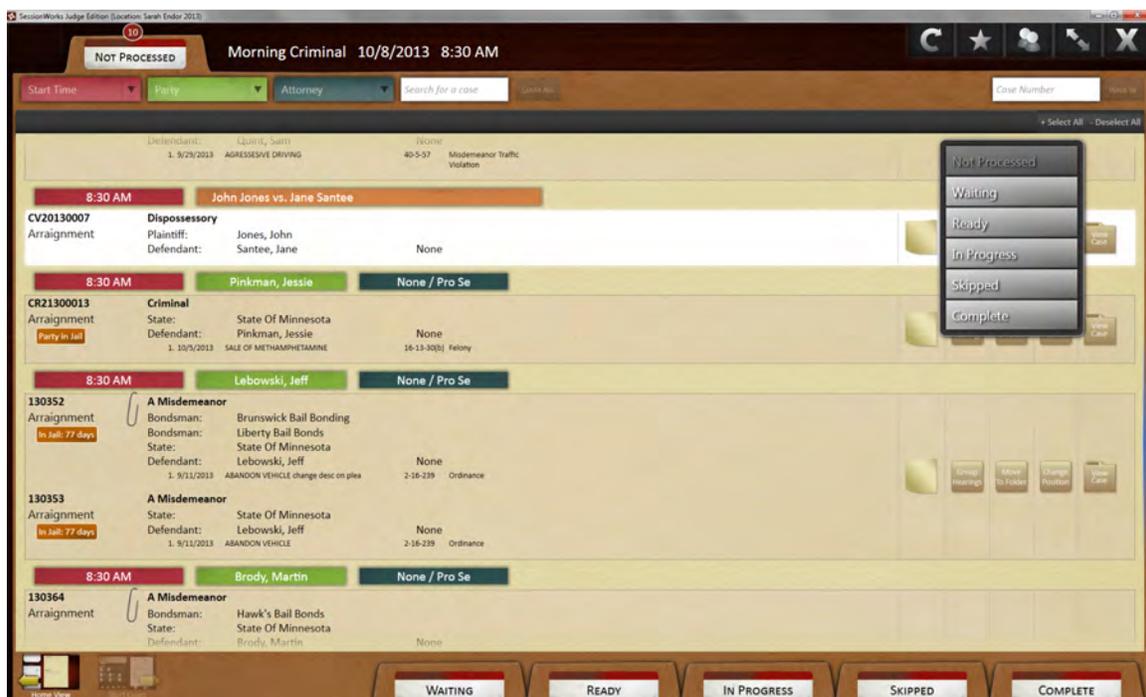


Figure 2.1 – New Action Menu Format

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.

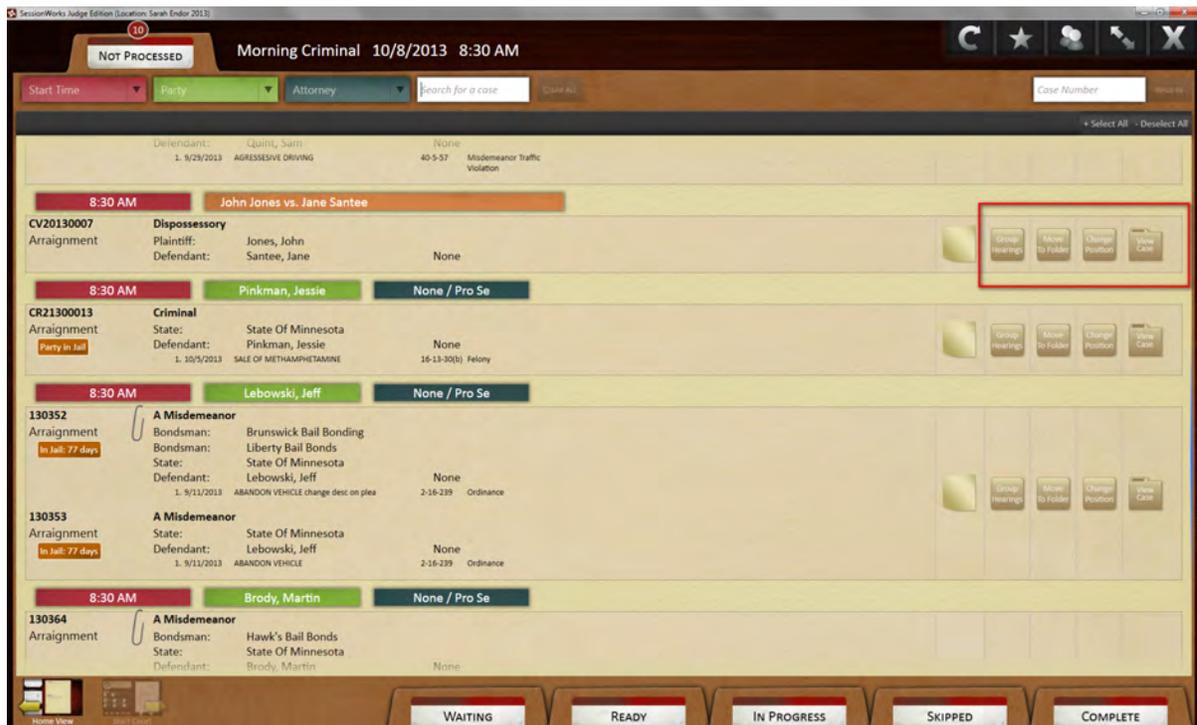


Figure 2.2 – Session Manger Action Menu Options

Related Cases Indicator

A **Related Cases Indicator** has been added to the top of the TOC in the **Case** view.

The **Related Cases Indicator** allows a judge to have a visual indicator, in **Case** view, to see that a case has a related case or cases. This eliminates the necessity of having to open the related cases combo to check each case for a related case.

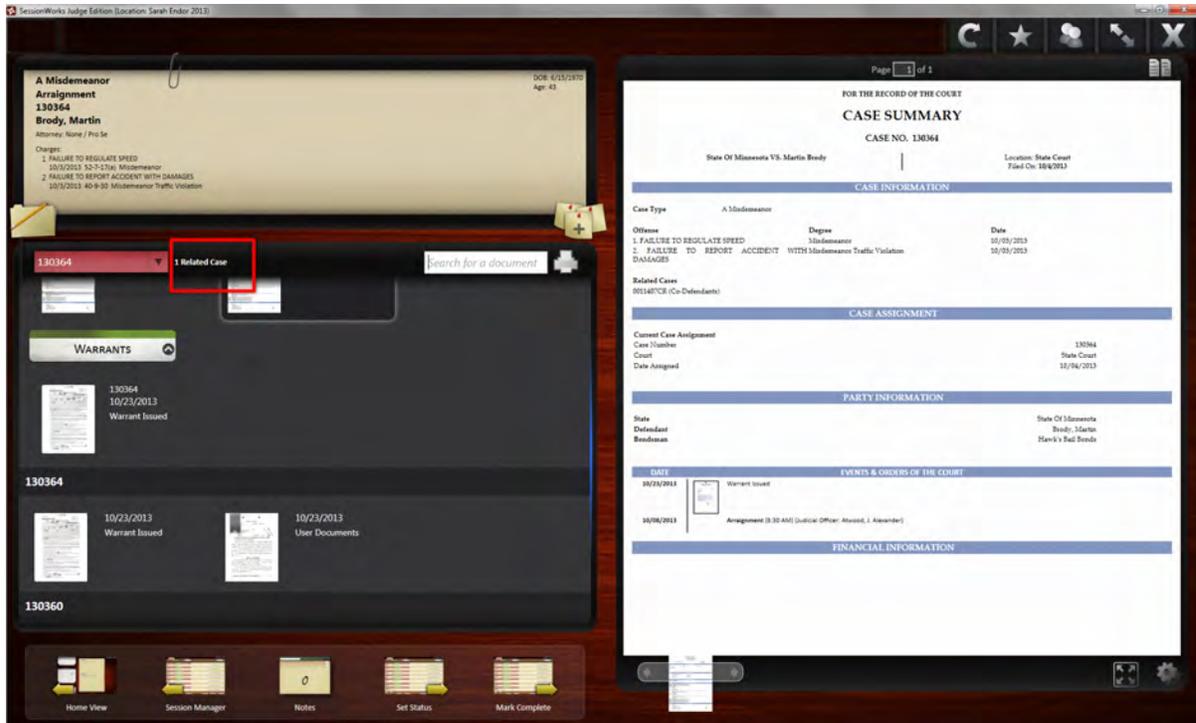


Figure 2.3 – Related Cases Indicator

Search and Navigate PDF Documents

In version 4.0, judges have the ability to search for text in a PDF document.

The following functionality is available:

- Search within a single pdf document if the document contains searchable text.
- Search button is disabled when text is not searchable.
- Search results are highlighted.
- Ability to navigate between search results in document list order.

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.

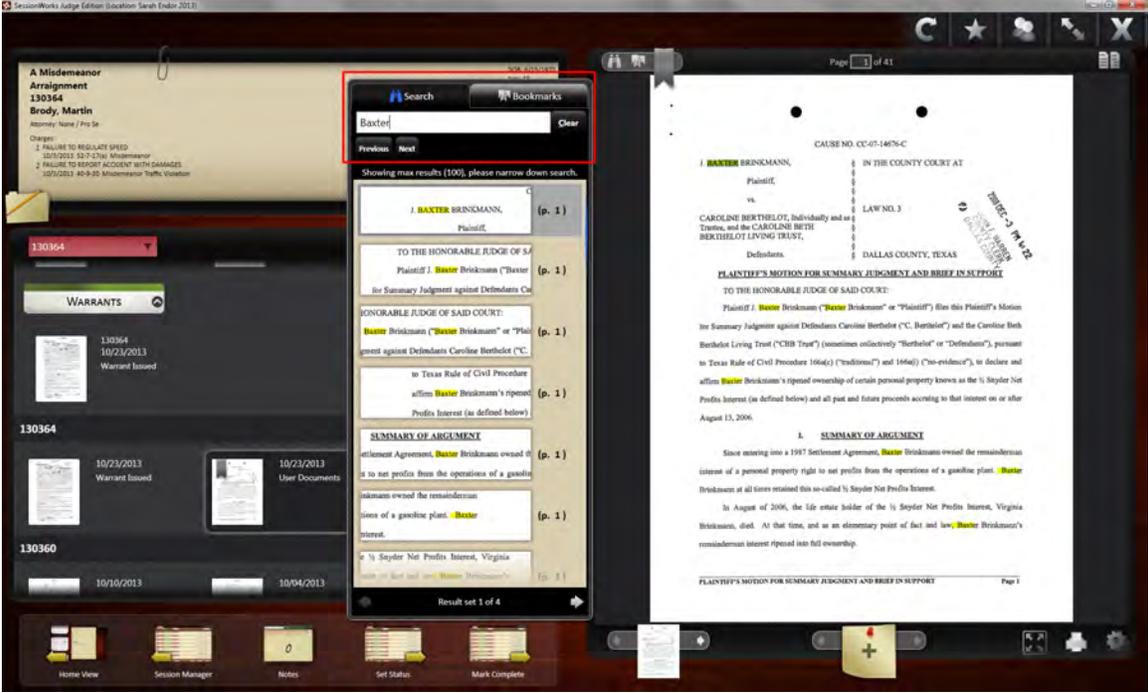


Figure 2.4 – Search in PDF Document

Navigating a PDF Document Search

Judge Edition allows the ability to navigate pdf document search results.

Click the left and right arrows at the bottom of the list of search results to navigate between pages of the document list order.

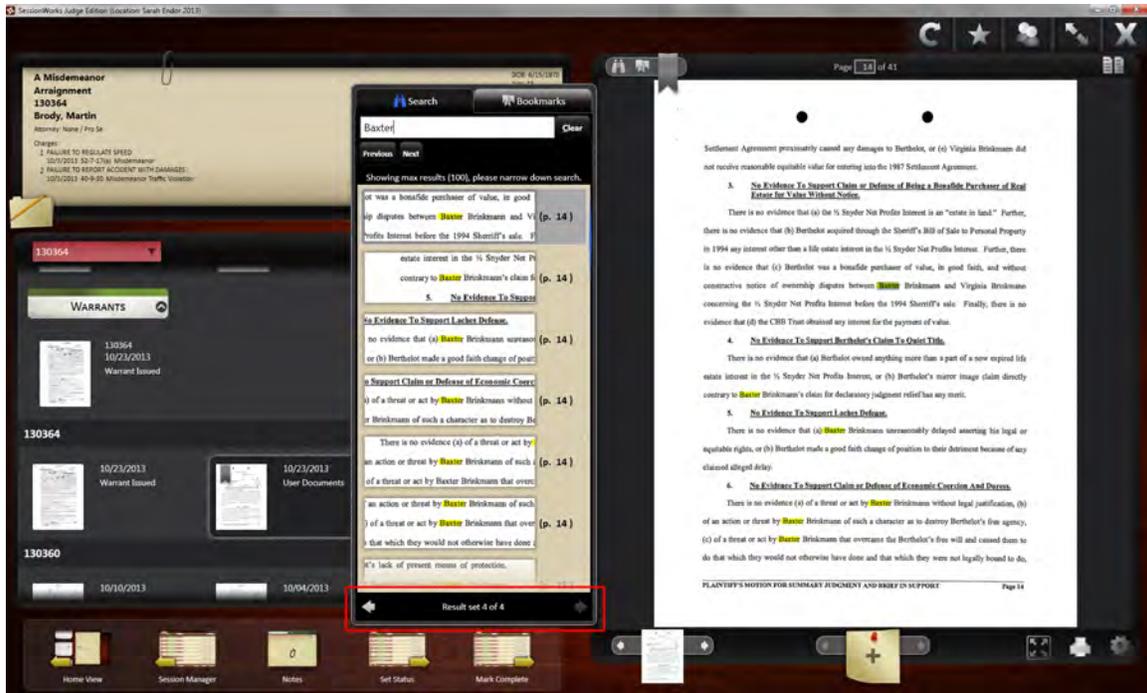


Figure 2.5 – Navigate PDF Search Results

Summary of Bookmarked Documents

The **Summary of Bookmarked Documents** feature is a summary page showing all the bookmarks on documents. This allows judges to quickly navigate documents during a court session by clicking .

The Summary of Bookmarked Documents feature includes the following:

- All documents with bookmarks can be viewed by selecting the **Summary of Bookmarks** option on the TOC.
- Ability to select a single document.
- Document view with all pages that are bookmarked.
- Show the name of the bookmarked document.
- Show the bookmarked page number.

Any PDF document that is electronically filed with native PDF bookmarks are shown in Judge Edition with the PDF bookmarks in the bookmark pane. Additional bookmarks can be added from Judge Edition.

Note: Native PDF bookmarks are always grey in color while bookmarks added from Judge Edition can have user-defined colors.

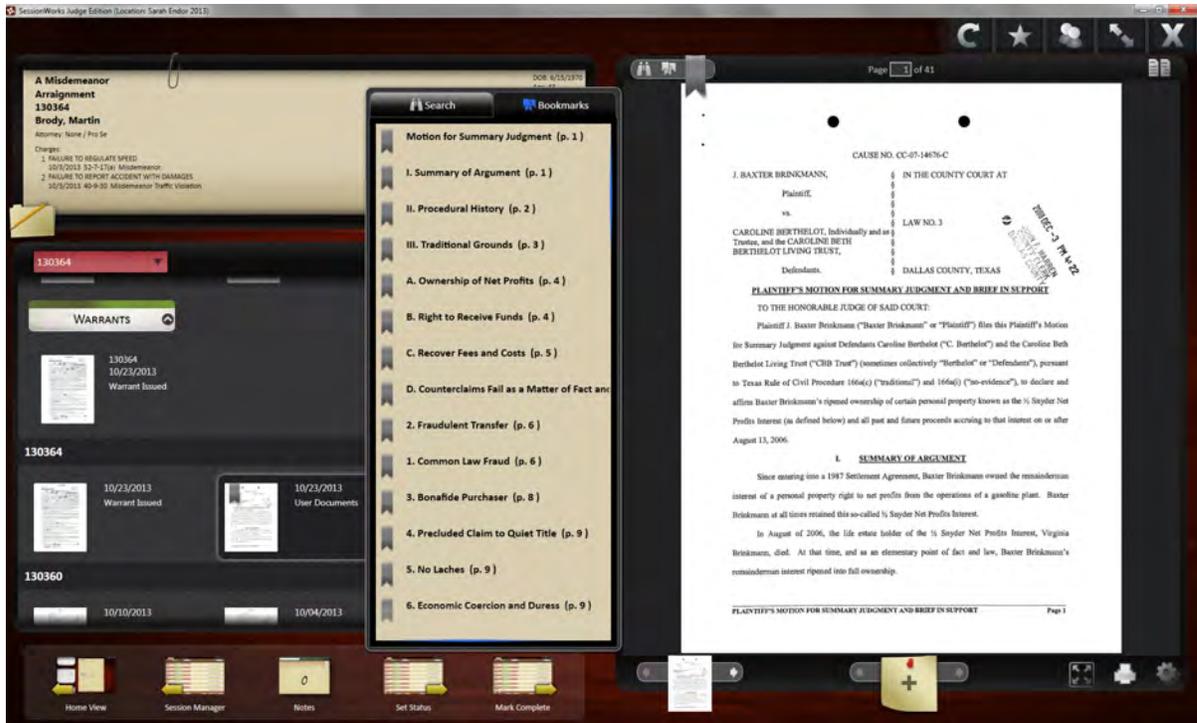


Figure 2.6 – Summary of Bookmarked Pages

Add Collection Status to ROA

The **Add Collection Status** feature allows judges to see the collection status on a case to determine if the party has a collection status.

A collection status can be added to a case or a payment plan. The collection status is displayed on the Register of Action (ROA) in the financial information section of the case. If a payment plan exists, only the collection status or statuses from the payment plan will be displayed.

Custody Status

The **Custody Status** feature gives judges and clerks the ability to track when a party is in jail, how much time the party has served, and how much credit has been received for time served. This feature is for users that do not currently have Jail Manager.

In Odyssey, if a party has a check placed in the “Party in Jail” checkbox on the **General** tab of the party record, then Judge Edition will indicate that the party is in jail on the **Case Details** section of the **Case** view.

Note: If a case falls outside of the configured case range, then that case will not be updated with the latest “In Jail” party flag on the Case Details section of the Case view or on the Session Manager page.

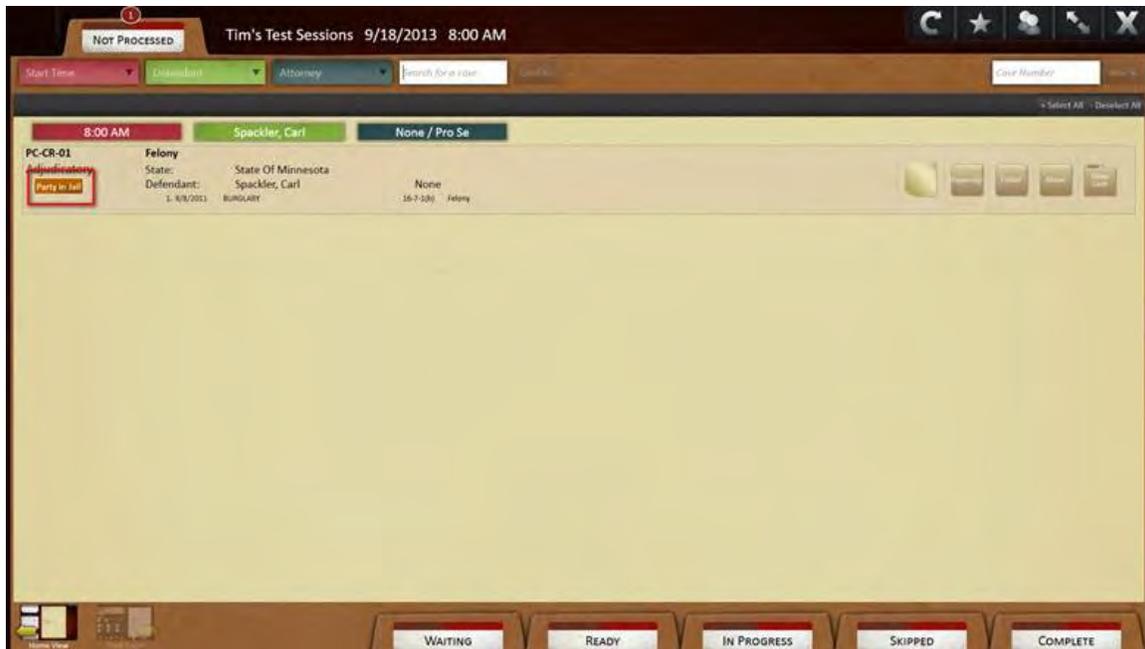


Figure 2.7 – Session Manager

When clerks fill out information on a charge in Odyssey to indicate when a party was put in jail on that charge and how much credit they have received for time served, Judge Edition will display the calculated number of **Days in Jail** and **Days Credit** as of the last refresh (overnight or manual) on the **Case Details** and on the **Register of Actions** sections.

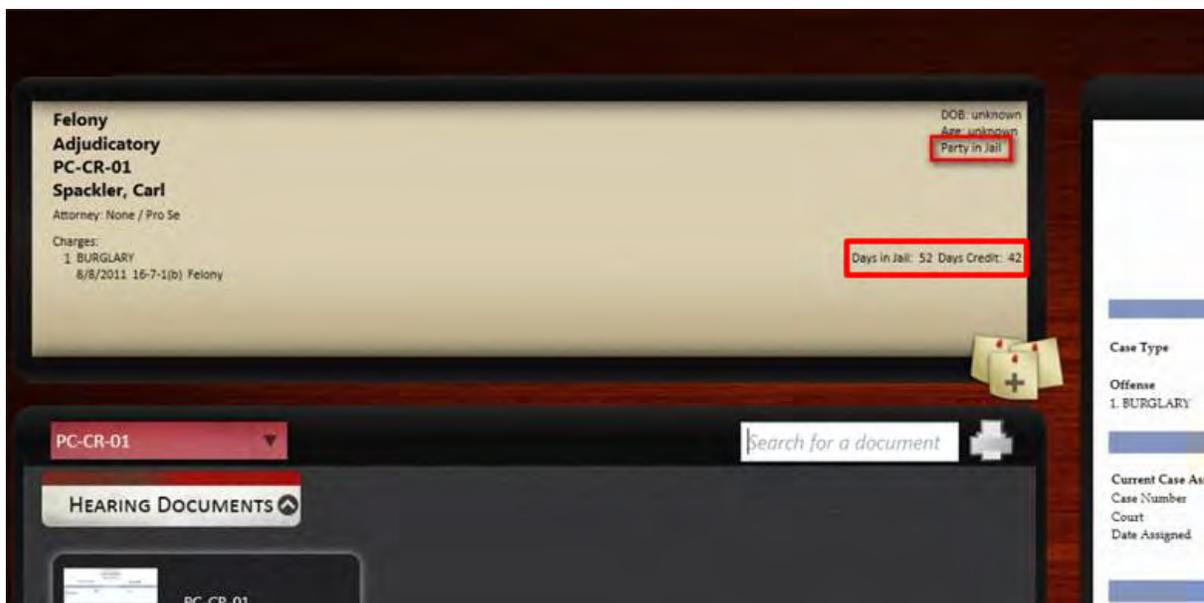


Figure 2.8 – Case Details

Page 1 of 2

FOR THE RECORD OF THE COURT

CASE SUMMARY

CASE NO. PC-CR-01

Location: Case Manager
Filed On: 8/8/2011

CASE INFORMATION

Case Type	Felony	Offense	Degree	Date	Days in Jail	Days Credit
1 BURGLARY	Felony			08/08/2011	52	42

CASE ASSIGNMENT

Current Case Assignment	Case Number	Court	Date Assigned	Case Manager
	PC-CR-01		08/08/2011	

PARTY INFORMATION

State	Defendant
State Of Minnesota	Spackler, Carl

EVENTS & ORDERS OF THE COURT

DATE	EVENTS & ORDERS OF THE COURT
09/18/2013	Adjudicatory (8:00 AM) (Judicial Officer: Abbott, Louise)
08/12/2011	Bond Forfeiture
08/12/2011	Service Affidavit

Figure 2.9 – Register of Actions

3 Navigation Controls

Topics Covered in this Chapter

- ◆ Scroll Bar Navigation
- ◆ Touch Gestures
- ◆ Keyboard Controls
- ◆ Find a Case Navigation
- ◆ Session Manager Filters
- ◆ Case Activities Navigation
- ◆ Document and Page Controls
- ◆ Notes Shortcuts

SessionWorks Judge Edition provides an intuitive user interface that supports both touch gestures and keyboard navigation controls that enable you to navigate smoothly through your daily tasks.

Scroll Bar Navigation

Scroll bars allow you to easily navigate through views using the mouse.

The following figure shows the scroll bar in the Session Manager; however, it can also be accessed in the **Home View**, **Table of Contents**, and **Document Viewer**. Pause over the blue line on the edge of the page and the scroll bar will display.

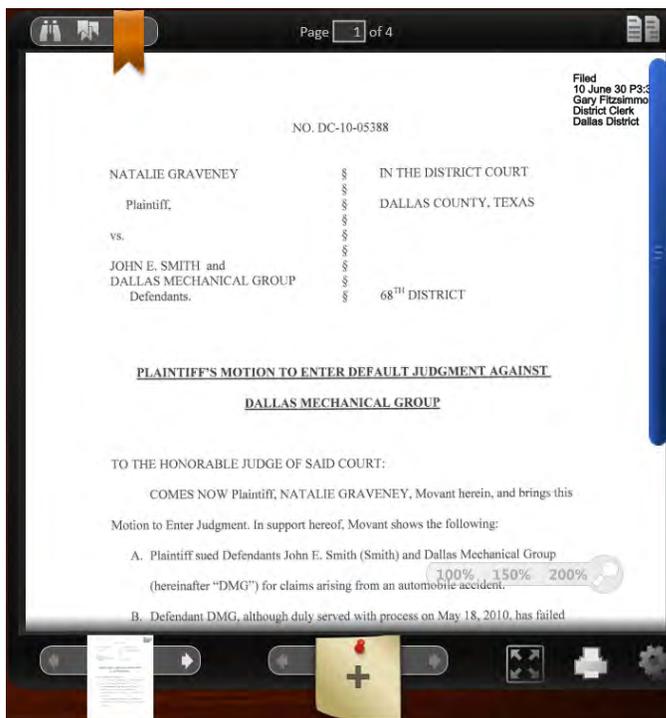
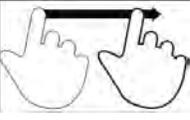


Figure 3.1 – Scroll Bars

Touch Gestures

Touch screen gestures include the following:

Activity	Gesture	Action
Select		Tap
List Scroll		Flick
		Brush surface with fingertip
Page Scroll		Vertical
		Horizontal
Move Object		Drag
Zoom In/Out		Pinch/Spread

Keyboard Controls

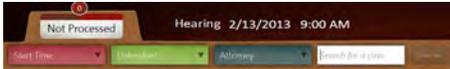
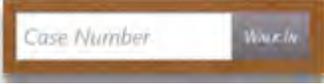
Activities from the keyboard include the following:

Activity	Keyboard
Add Case Note	F2
Previous page	Left Arrow / Page Up
Next page	Right Arrow / Page Up
Last page	End

Activity	Keyboard
First page	Start
Full-screen toggle	F11
Session Manager Focus on Find field	Ctrl + F

Find a Case Navigation

Case Search activities include the following:

Activity	Location	Action
Navigate Cases		
Search for a Case	<p>Session Manager page</p> 	<p>Provide the case detail text as criteria to locate a case, using either method:</p>  <ol style="list-style-type: none"> 1. From drop-down lists, select appropriate values for filtering cases during search. 2. Type text in Search field to match against case contents.
Retrieve a Non-Scheduled Case	<p>Session Manager page</p> 	<p>Provide the number of the case to retrieve from Odyssey.</p> <ol style="list-style-type: none"> 1. Type the Odyssey Case Number.  <ol style="list-style-type: none"> 2. Tap WALK IN. If found, an entry for that case number appears in Session Manager list of cases.

Session Manager Filters

If setting a value in one of the filters affects another filter, the affected filters will update according to the first filter set. For example, the defendant James Smith is connected with the attorney Ron Harrison. When Ron Harrison is selected from the **Attorney** filter, the **Defendant** filter will only include James Smith. A 'bread crumb' will be left in the pane below the filters for visibility into what has been selected. This works in whatever direction specified. If the **Defendant** filter was selected first, the **Start Time** and **Attorney** options would also be filtered down accordingly.



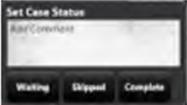
Figure 3.2 – Filter Functionality



Figure 3.3 – Filter Bread Crumbs

Case Activities Navigation

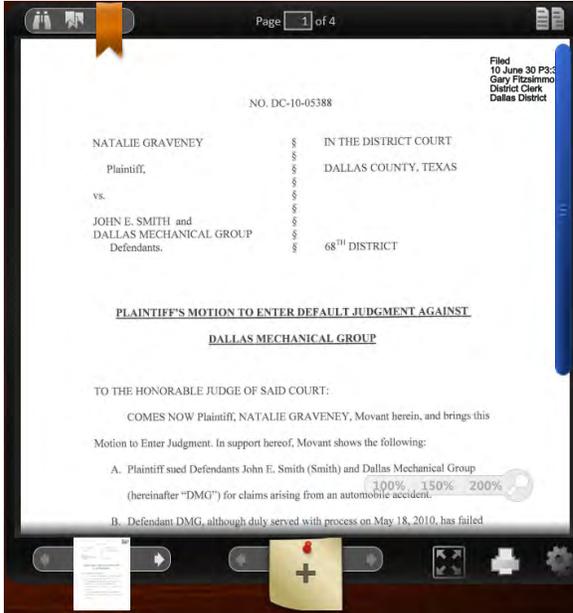
Case activities include the following:

Activity	Option	Action
Case Control	<p>Session Manager Action menu options</p> 	<p>Tap the button of the desired action.</p>
View cases	<p>Action menu</p> 	<p>Tap View Cases button to view a case.</p> 
Move case position within a folder	<p>Action menu</p> 	<ol style="list-style-type: none"> 1. Tap Change Position on the Action menu.  <ol style="list-style-type: none"> 2. Tap the section labeled with desired direction.
Place case into another folder	<p>Action menu</p> 	<ol style="list-style-type: none"> 1. Tap Move To Folder on the Action menu.  <ol style="list-style-type: none"> 2. Tap the destination folder.
Navigate cases in a session	<p>Case Nav pane Set Status button</p>	 <ol style="list-style-type: none"> 1. Tap Set Status.  <ol style="list-style-type: none"> 2. Tap the button of the destination folder.

Activity	Option	Action
Action on a case	Action menu 	<ol style="list-style-type: none"> 1. Tap the button of the action to apply. 2. Tap selection from drop-down menu.
Group selected cases	Action menu 	<ol style="list-style-type: none"> 1. Tap each individual case to select and highlight. 2. Tap Group Hearings on the  Action menu. 3. Tap Group Hearings.
Ungroup cases	Action menu 	<ol style="list-style-type: none"> 1. Tap the group to highlight it. 2. Tap Group Hearings on the  Action menu. 3. Tap Ungroup Hearings.

Document and Page Controls

Document and page activities include the following:

Activity	Action	
Document Viewer		
Go to Page		<ol style="list-style-type: none"> 1. Tap  to open the Go to Page pad.  <ol style="list-style-type: none"> 2. Tap the number of the page to view. 3. Tap Enter.
Gear		<ol style="list-style-type: none"> 1. Tap to open the Document Viewer controls. 2. Tap again to close the controls.

Activity	Action	
		<p>Move the slider first to zoom, and then tap the pan arrows.</p> <ul style="list-style-type: none"> • Pan control works on a zoomed document moving the document in the direction of tapped arrow. • Slide zooms in and out. • Circular arrow rotates the document clockwise.
Full Screen		Places document in separate screen with Document Viewer controls.

Notes Shortcuts

Note activities include the following:

Activity	Action
Add Case Note	F2
Add Page Note: Displayed Page or Left Pane	F3
Add Page Note: Two Page Case View	Left pane – F3 Right pane – Shift + F3
Add Document Note	Open or left pane – F4 Right pane – Shift + F4

4 Signing On

Topics Covered in this Chapter

- ◆ Signing On

Signing On

Your sign on credentials open SessionWorks Judge Edition to your *Home* page.

On your *Home* page are calendars that show, by month and day, the Odyssey court sessions scheduled for you.

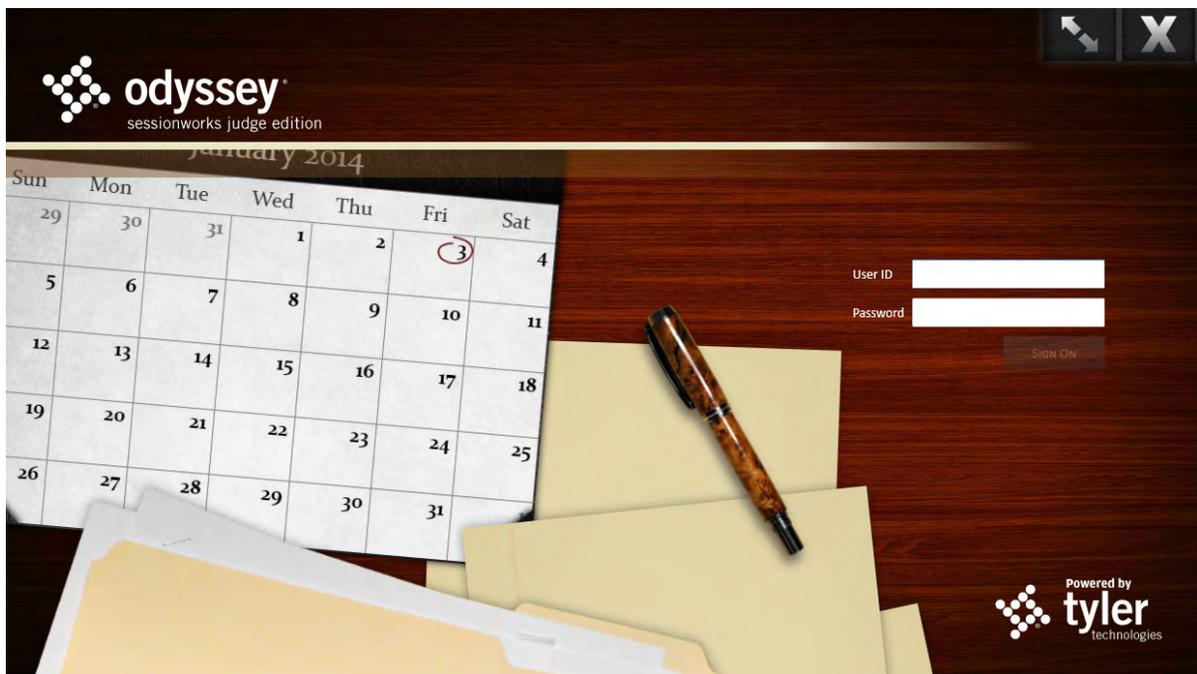


Figure 4.1 – Odyssey SessionWorks Judge Edition Sign-On Screen

5 Refresh Functionality

Topics Covered in this Chapter

◆ Refresh Buttons

Refresh Buttons

There are three screens within Judge Edition which offer the refresh functionality. Although Judge Edition presents a unified **Refresh** button, its impact varies based on the screen from which it is triggered.

The three screens with refresh functionality are the **Home View** screen, which is the initial screen after signing on; the **Session View** screen, which displays when a session is selected from the **Home View**; and the **Case View** screen, which is used to view case data and documents.

The following data gets refreshed and retrieved by clicking :

- Home View
 - Calendar data (which days have sessions) for sessions which have ANY matching configured resources.
 - Session data (number of scheduled settings for each session) for sessions which have ANY matching configured resources.
- Session View
 - List of settings in the active session.
 - Case data for the cases in the active session (excluding walk-in cases).
 - Case document data for the cases in the active session (excluding walk-in cases).
- Case View
 - Works exclusively for scheduled cases. Walk-in cases cannot be refreshed.
 - Case Data
 - Case document data
 - Case documents

6 Calendars and Scheduled Sessions

Topics Covered in this Chapter

- ◆ Home Page
- ◆ Monthly and Daily Calendars
- ◆ Filter Sessions by Resource in Home View

This chapter guides you through the activities of working without paper and file folders. Users can view essential case information, access and bookmark vital documents, and enter and attach notes. Also, users can conveniently work with multiple defendants or cases simultaneously. The *Home* page was created to resemble your bench desktop. The *Home* page allows users to navigate and manage session and case information efficiently and securely from their personal workspace.

Home Page

The **Action List** remains blank until cases are reviewed and placed in the **Ready** folder.

Using folders is reviewed in the “Session Manager” chapter.

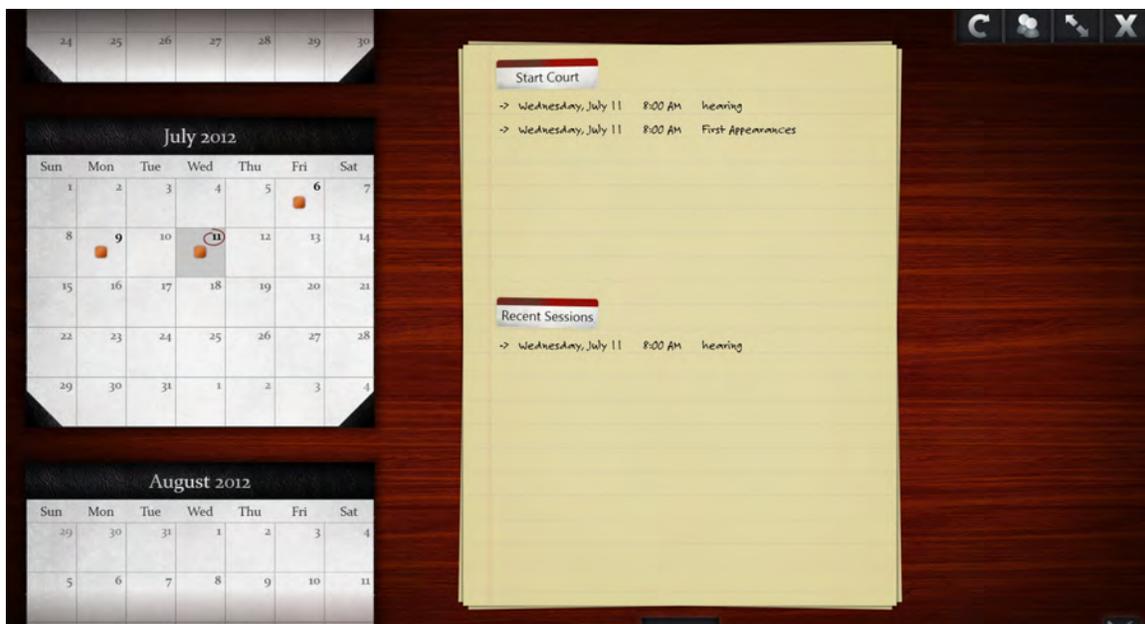
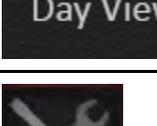


Figure 6.1 – Home – Action List

Home Page Buttons

The buttons on your *Home* page enable you to perform specific functions.

Home Page Buttons

Buttons	Descriptions
	Refreshes the calendars with information uploaded from Odyssey Case Manager.
	Opens the <i>Group Navigation</i> dialog box. For instructions, refer to the “Group Navigation” section.
	Maximizes and minimizes the current screen.
	Initiates the closing of the SessionWorks Judge Edition application.
	Populates with read-only, quick-reference information from the items already addressed and moved to the Ready folder.
	Displays the monthly and daily calendars for the current user.
	Opens the <i>Configuration</i> page. For information and instructions, refer to the “Judge Edition Configuration” chapter.

Group Navigation

Group Navigation mode supports one user as the director, while all other users are followers. Only one user at a time can be the director, who opens and works on exactly what the followers see on their screens. Private notes to any user are not visible to other users.

To use **Group Navigation**, click the appropriate option for the action you want.

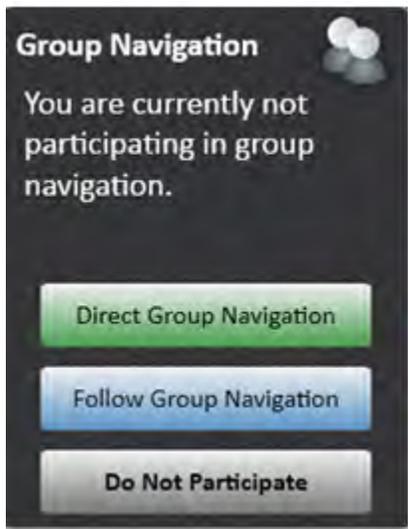


Figure 6.2 – Group Navigation Control

Monthly and Daily Calendars

On your desktop, in **Day View**, the monthly and daily calendars show your scheduled sessions. Sessions are opened from the calendar.

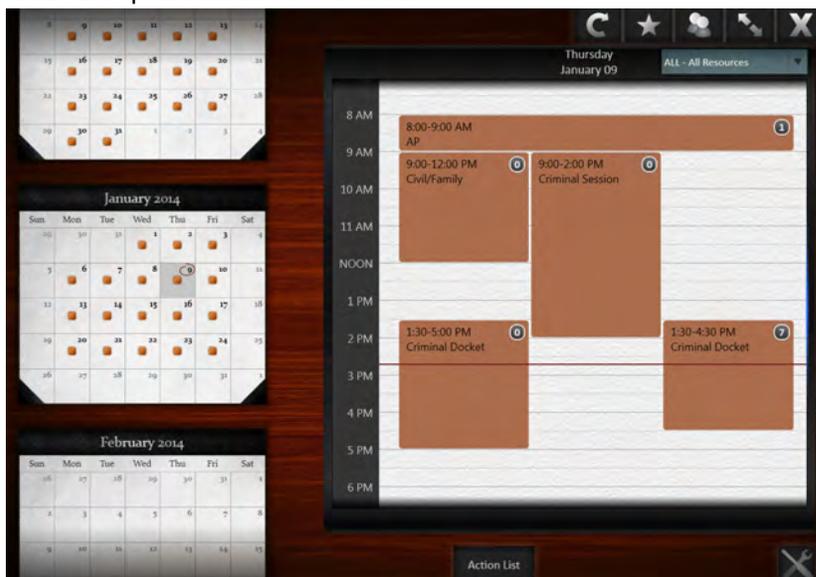


Figure 6.3 – Home – Day View

For a case to display on your calendar, it must originate from a hearing set up in Odyssey Case Manager.

Indicator	Description
	Indicates sessions scheduled for the day.
	Identifies current day.
	Highlights selected day.
Action List	Populates with read-only, quick-reference information from the items placed in the Ready folder, after tapping Start Court (explained on the Case Nav pane).
Day View	Displays the monthly and daily calendars for the current user.

To scroll to a desired month and select a day:

1. Scroll calendar months to desired month by flicking a fingertip over the calendar area or pause over the blue line on the edge of the page with the mouse to display the scroll bar.
2. To select a day, tap its calendar square.

This opens the court session calendar for the day.

3. To view sessions scheduled for the day, flick over the day calendar.

The horizontal red line indicates the current time.

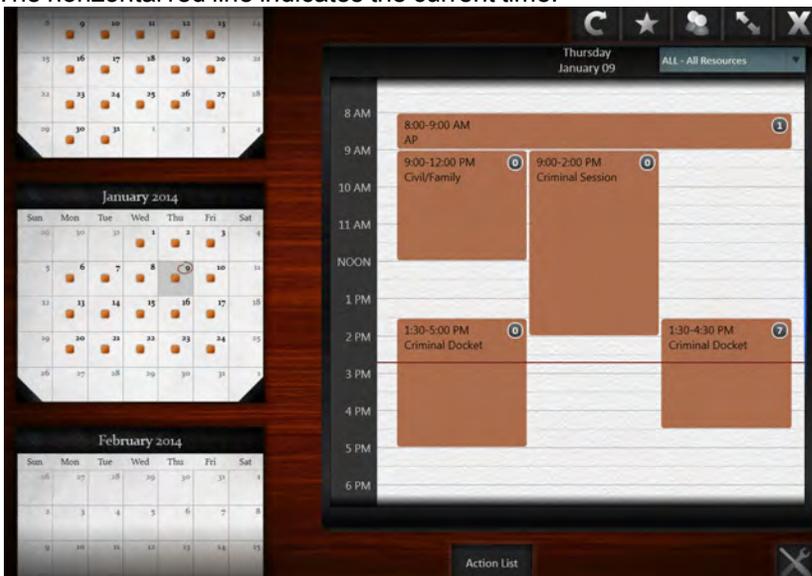


Figure 6.4 – Home – Day View

These indicators appear on your daily calendars.

Indicator	Description
	Indicates the number of cases scheduled for a specific session.
	Marks the current time with a red line.

Filter Sessions by Resource in Home View

In the **Home** view, judges have the ability to filter sessions where they are the resource in Case Manager.

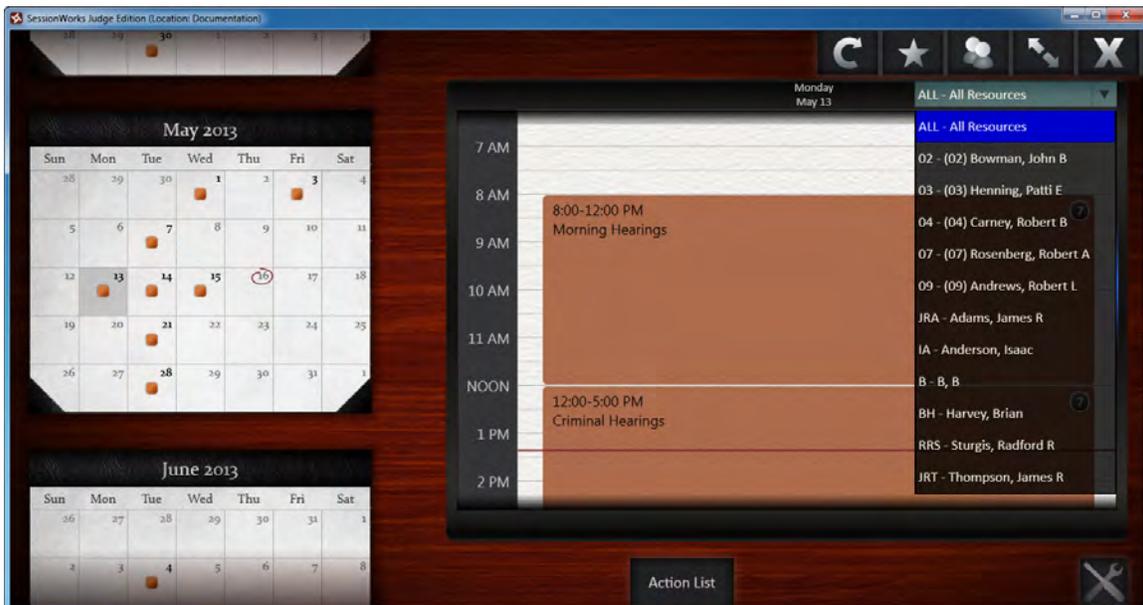


Figure 6.5 – Filter Session by Resource

7 Cases and Folders

Topics Covered in this Chapter

- ◆ Session Manager Updates
- ◆ Filter & Search Across Folders in Session Manager
- ◆ Cases and Folders
- ◆ Case Flags
- ◆ Session Manager Folders
- ◆ Searching for a Case
- ◆ Viewing a Case File

Session Manager Updates

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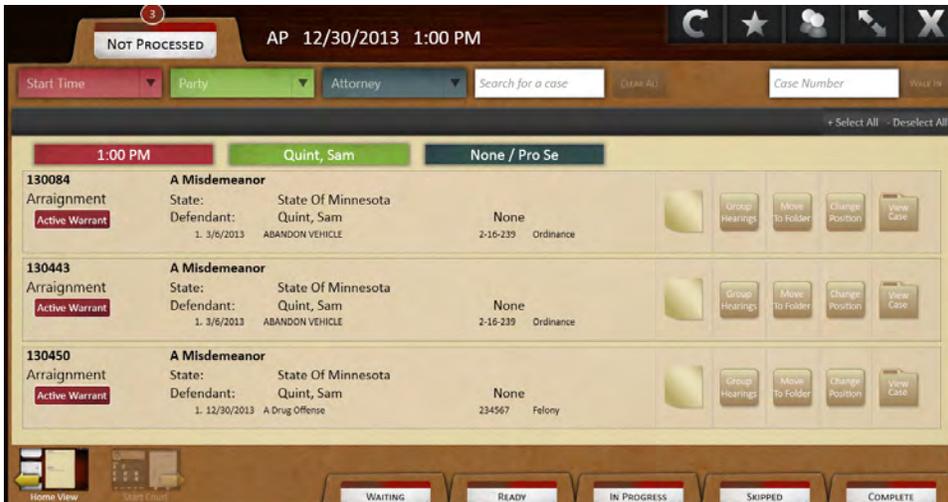


Figure 7.1 – Session Manager

Filter & Search Across Folders in Session Manager

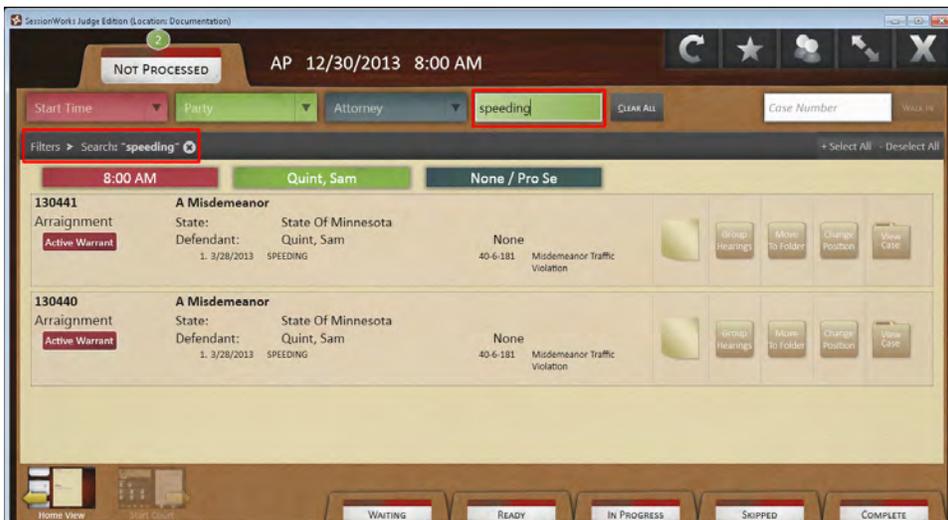


Figure 7.2 – Filter and Search Across Folders

Cases and Folders

The session that you select opens in Session Manager showing an entry for each case scheduled for that session. Folders represent the file folders on your desk.

In Session Manager, folders are the holding areas where you place cases as you work with them. Initially, scheduled cases are in the **Not Processed** folder. Based on the order and details surrounding how you plan to hear each case, place each case into the appropriate folder to reflect your workflow.

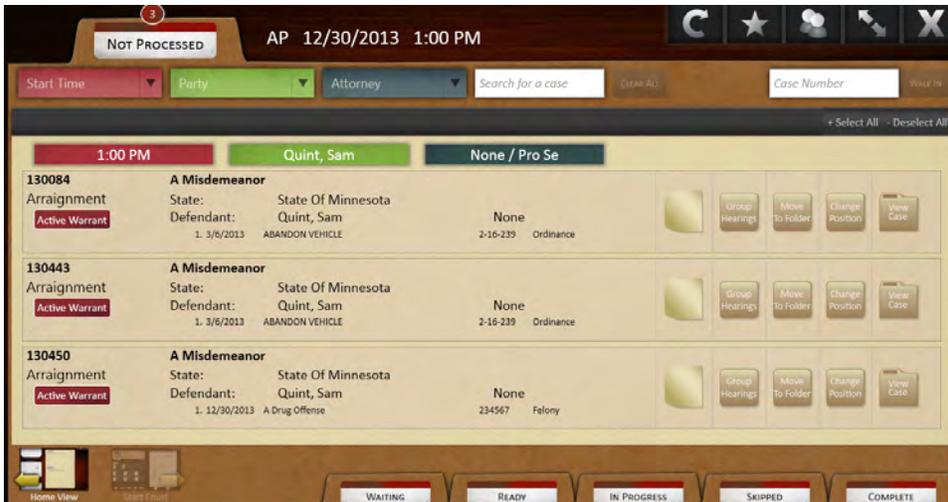


Figure 7.3 – Session Manager – Not Processed Folder

Case Flags

Case flags are viewable from Judge Edition **Session Manager** and **Case View**. Case flags give additional information about a case.

Multiple case flags will be listed, and case flag comments can be viewed from the Judge Edition ROA.

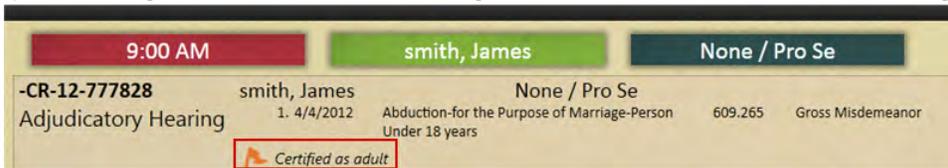


Figure 7.4 – Case Flags

Session Manager Folders

Each folder has a red circle with the number of cases currently in that folder.

Folder	Description
Not Processed	Contains scheduled cases downloaded from Odyssey.
Ready	Contains cases ready to be heard according to the order in which you placed the case into this folder. Tap Start Court to open the first case in folder.
Waiting, In Progress, Skipped	Holds cases meaningful to you for the current court session.
Complete	Contains cases directed by the Mark Complete button on the Case Nav pane.

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.

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

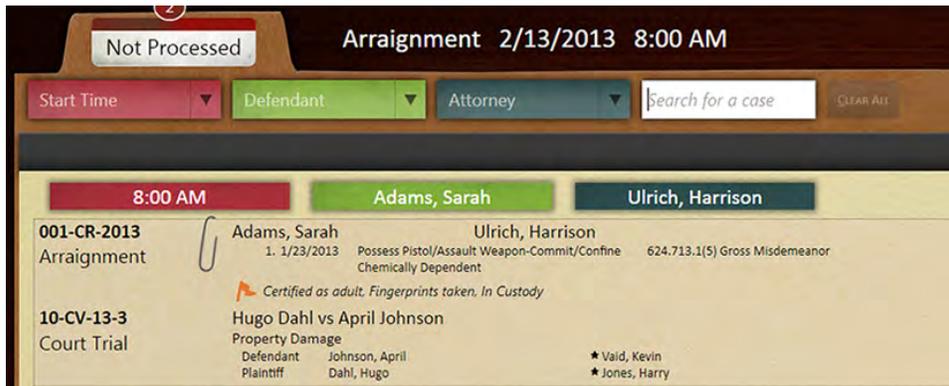


Figure 7.5 – Cases Fastened with a Paperclip

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**.

Searching for a Case

SessionWorks Judge Edition provides several methods for quickly retrieving cases.

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.

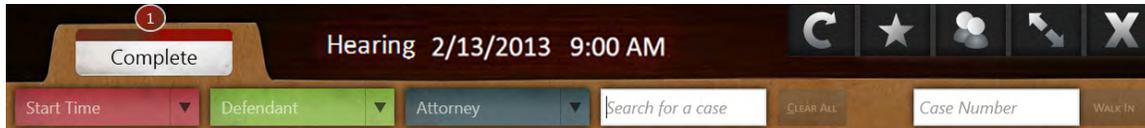


Figure 7.6 – Search Criteria Fields

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.

Using Session Manager Case Details Information to Retrieve Matching Cases

The case details information listed in Session Manager can serve as the search criteria to retrieve cases that match that information.

Case details information is shown in the following figure:



Figure 7.7 – Session Manager Case Details Information

To use case details information to search for cases:

1. In the **Search for a case** text box (white text box), type the case detail information to match against information in cases.

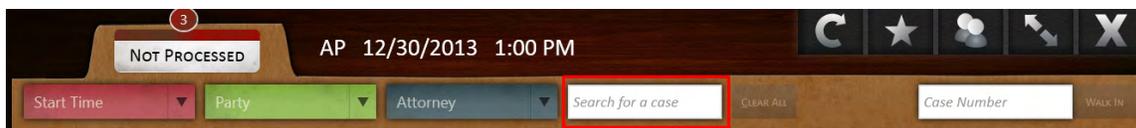


Figure 7.8 – Search Text Box

2. To open a specific entry in the list of returned matches, click the  (**View Case** button) on that case.

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.

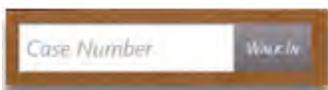


Figure 7.9 – WALK IN Search Field

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.

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.

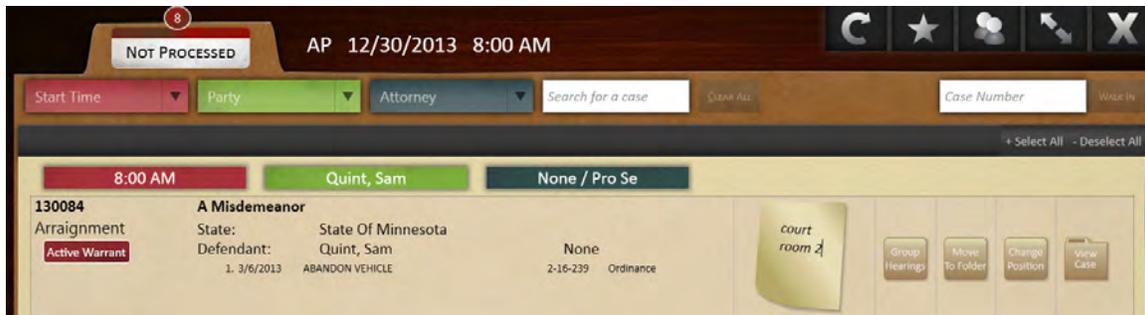


Figure 7.10 – Sticky Note on a Case File

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.

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.

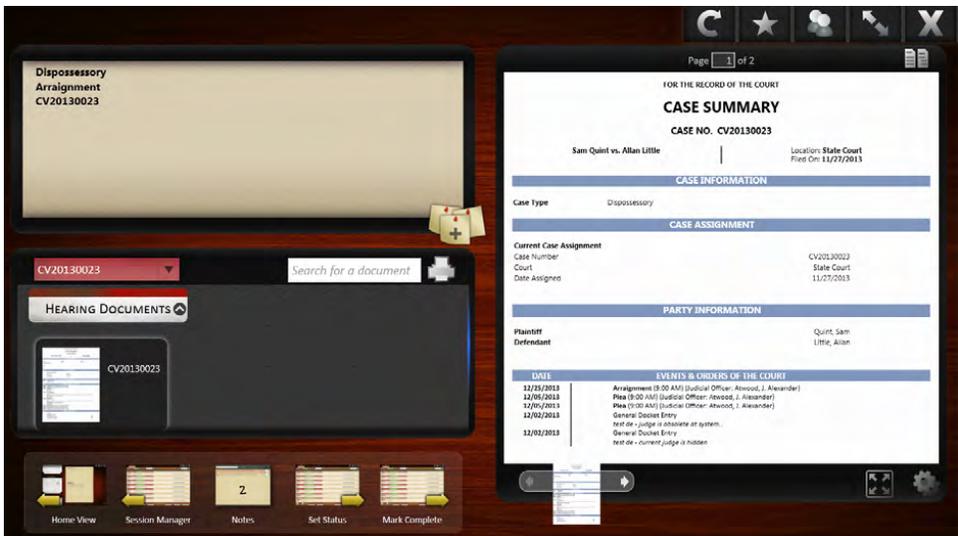


Figure 7.11 – Viewing a Case File

Case Nav Pane

In **Case View**, the **Case Nav** pane provides buttons for toggling between **TOC** and **Notes**.



Figure 7.12 – Case Nav Buttons

The following options are available in the **Case Nav** pane.

Button	Description
Home View	Closes Case View and opens the Home View where your calendars reside.
Session Manager	Opens Session Manager.
TOC or Notes	Opens the Table of Contents , which includes the Favorites pane. Opens the list of notes when notes exist.

Button	Description
Set Status	Opens the dialog box so you can place the current case into a work folder, add a note, and move a case.
Mark Complete	Sends the open case to the Complete folder.

Case Details

The **Case Details** pane displays information belonging to the open case. Typically this includes the case type, case number, parties involved, and name of the lead attorney.

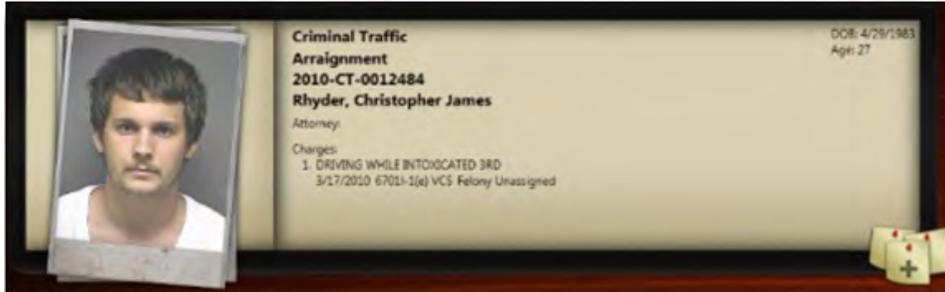


Figure 7.13 – Case Details Pane in Case View

Refer to the “Judge Edition Configuration” chapter or ask your administrator to configure the categories of information that appears on the **Case View** in the **Case Details** pane .

Internet Favorites

Users have direct access to his or her favorites websites while working within the Judge Edition application. While running the application in full screen mode, selecting a website launches the default browser without having to navigate away from Judge Edition.

Internet Favorites is configurable. Configurable options include:

- Manage bookmarks and create folders.
- Launch default browser upon selection of a bookmark.

Note: Internet Favorites configuration is tied to the user profile.

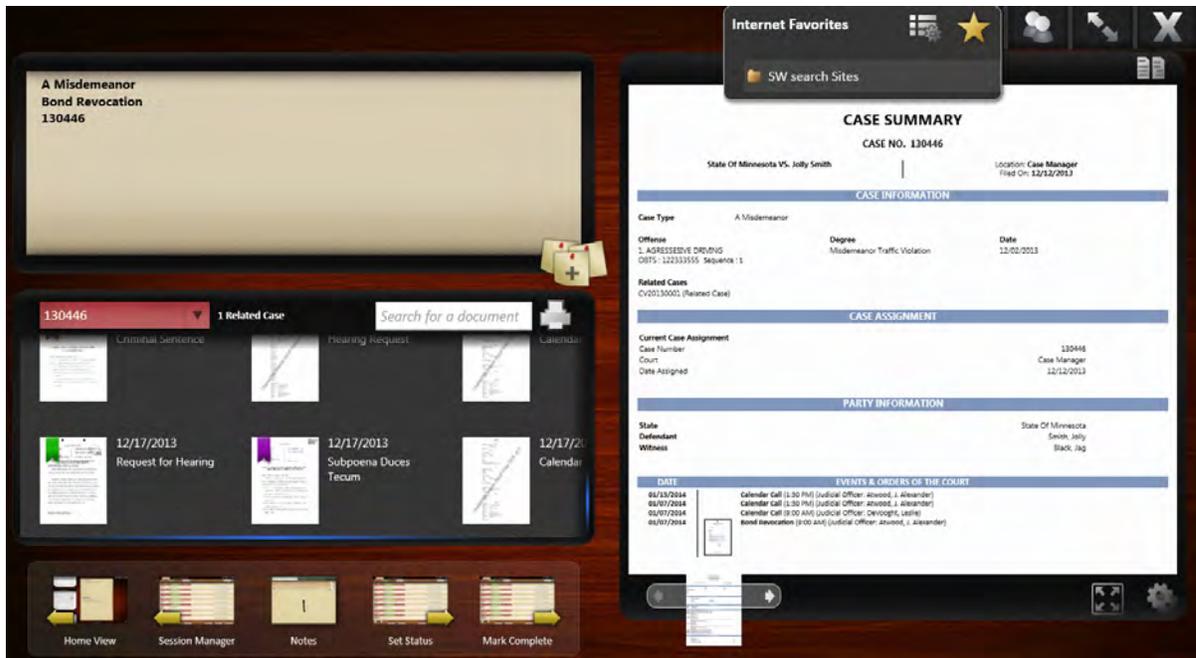


Figure 7.14 – Internet Favorites

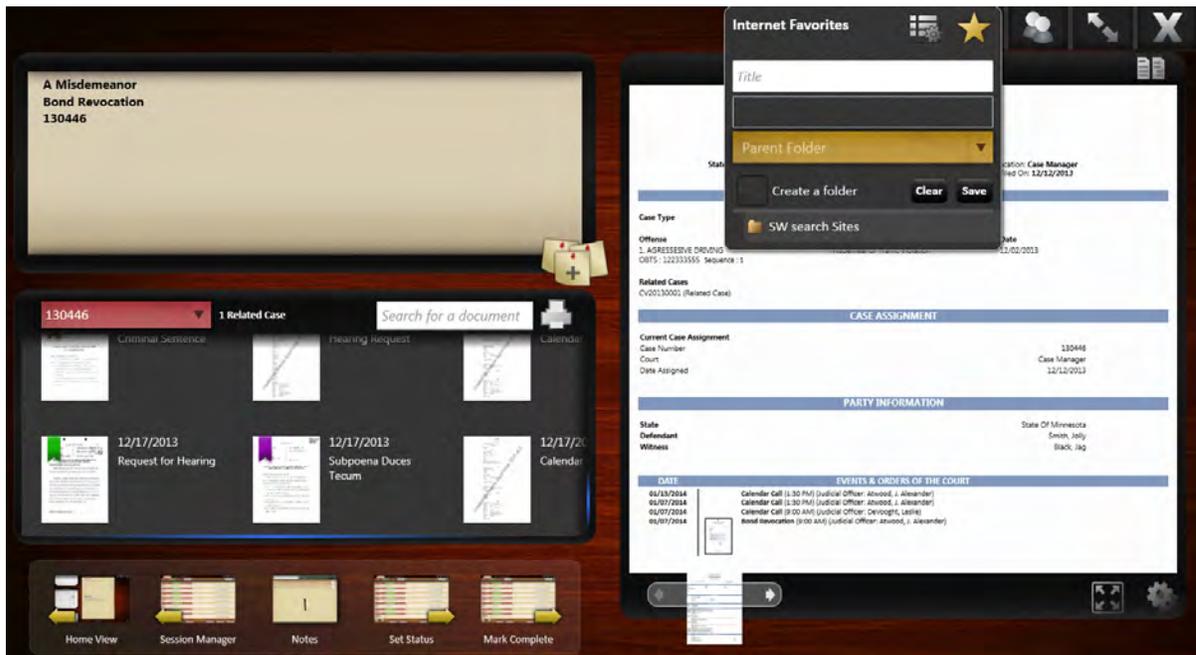


Figure 7.15 – Configurable Internet Favorites – Add a Bookmark

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.

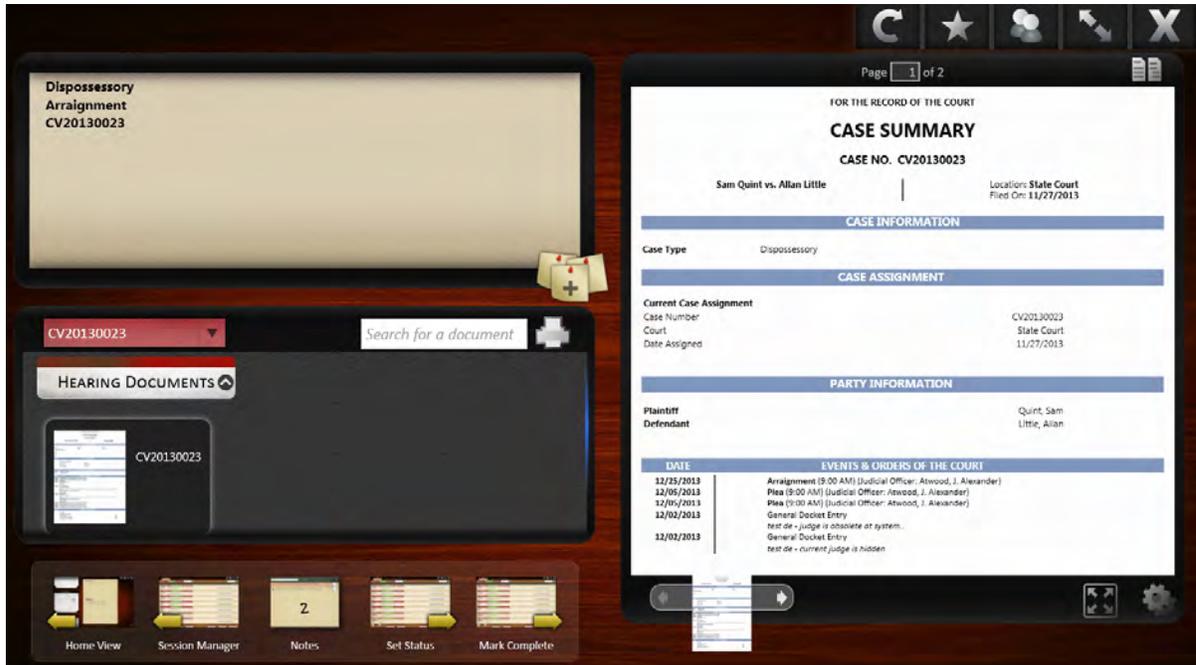


Figure 7.16 – Case View

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**.

Print Multiple Documents

Users have the ability to print multiple documents simultaneously without opening each document. The

Printer icon  is easily accessible, which simplifies printing documents.

To print documents, tap , select documents to be printed from the left panel, and then select the **Print Selected Documents** button at the bottom of the **TOC**.

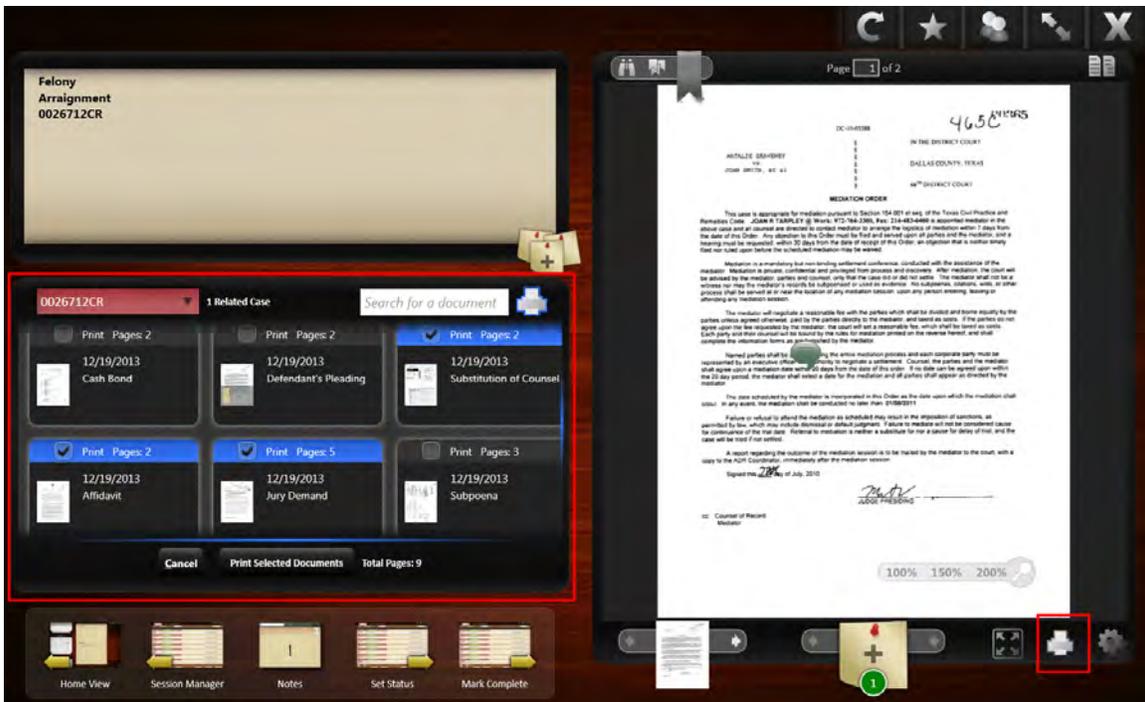


Figure 7.17 – Print Multiple Documents

Related Cases

Documents that are related on the **Detail** tab of the case in Case Manager will be available for viewing in Judge Edition.

The document contents of the related case will be available in the **TOC**. The **Case Details** view will toggle to the **Viewing a related case** view when you select the related case from the **Combo** drop-down list.



Figure 7.18 – Related Cases Combo

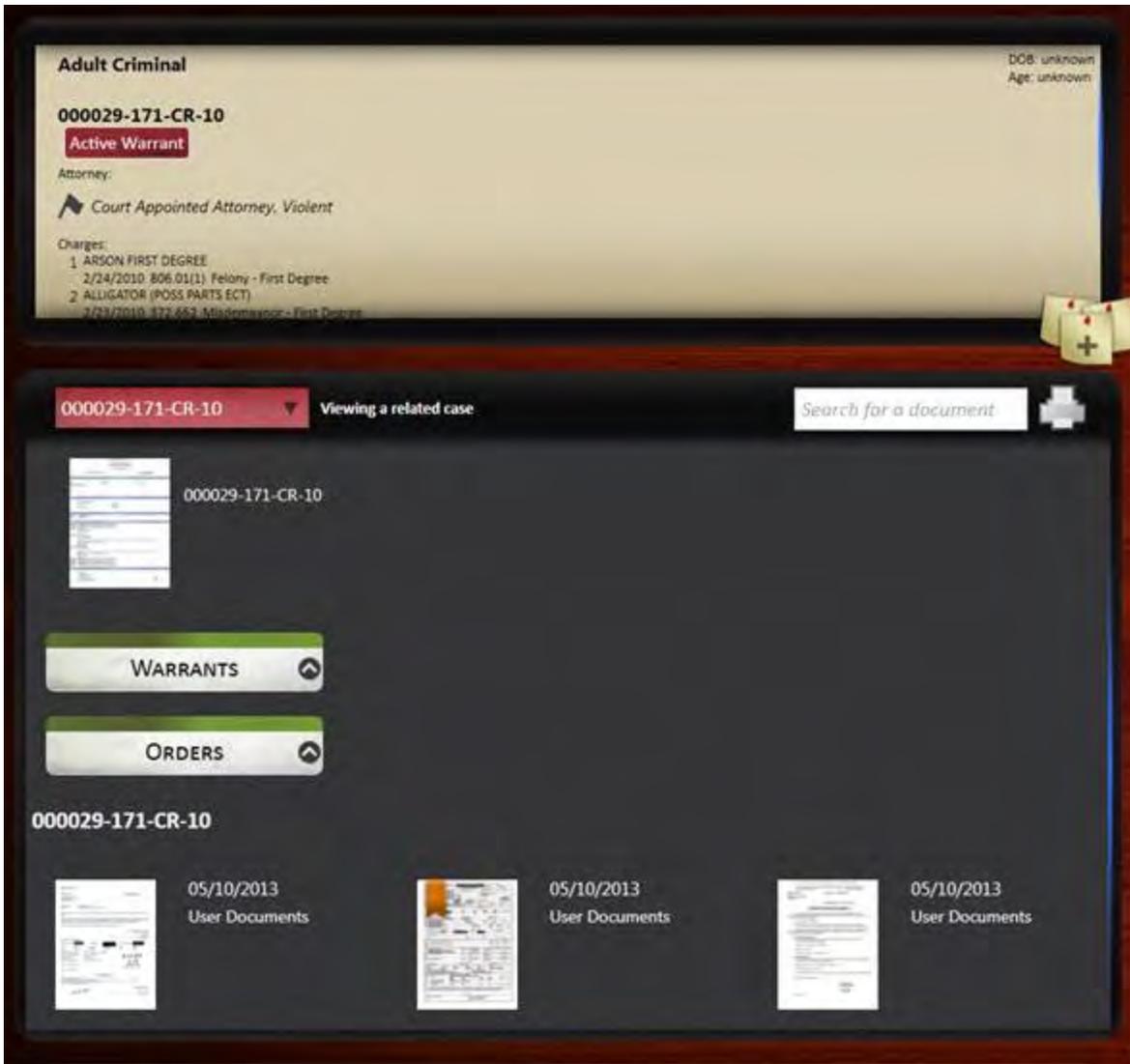


Figure 7.19 – Related Cases

8 Documents on a Case

Topics Covered in this Chapter

- ◆ Handling Documents
- ◆ Bookmark Pages of Interest

Users can review selected documents either one or two at a time, flag pages with bookmarks, work with notes, download PDF documents, copy text from PDF documents, and print documents.

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**.

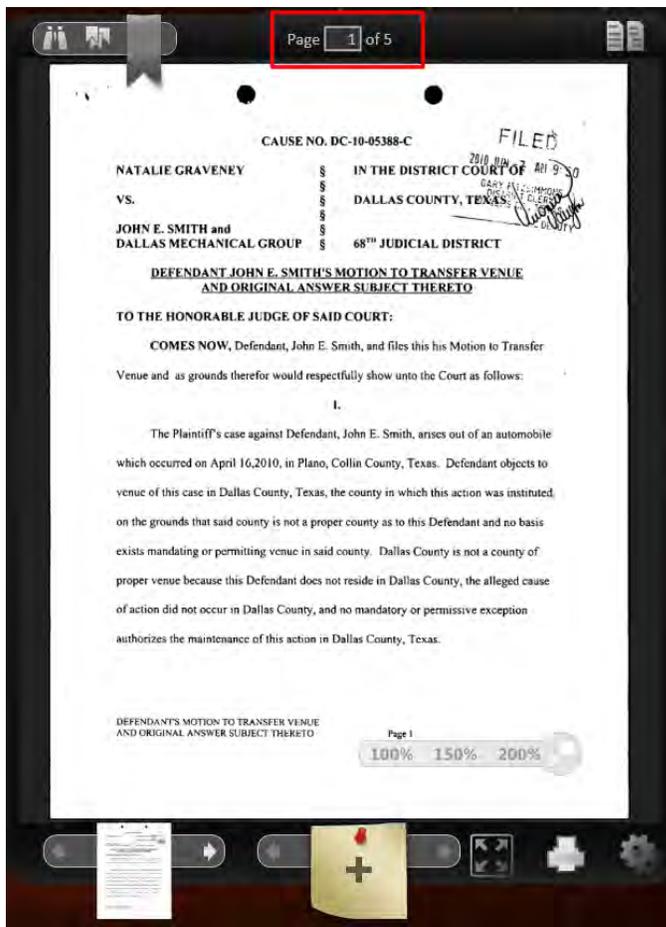


Figure 8.1 – Multi-page Document with Document Viewer Controls

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

Odyssey Document Security Model

When a case is downloaded, a list of documents attached to the case are downloaded as well. You will only be able to view secured documents attached to a case if you have been assigned user-rights to do so.

Paging

Several options are available to page through a document.

To move quickly to another page, use one of these options:

- Tap  to open the **Go to Page** pad, and then tap the number of the page to open in the viewer.



- Tap an arrow to go to next/previous page.



- Flick the pages to go to the next or previous page.

Zooming and Panning

To adjust the size and position of the document in the **Viewer** screen, use touch gestures, the **Zoom/Pan/Rotate** control, or the **Zoom** tool. For detailed instructions on touch gestures, refer to the “Navigation Controls” chapter.

To zoom and pan, use one of the methods:

- Pinch and spread  on the document.
- Tap the gear  to open the **Zoom/Pan/Rotate** control.



- Move the slider  first to zoom, and then tap the appropriate pan arrows .
- Use the circular arrow to rotate the open image.

- Pause your mouse across the bottom of the **Viewer** screen to display the zoom tool.



, and then click the desired magnification.

Open Another Document

Two different case documents can be viewed simultaneously in side by side **Document Viewers**.

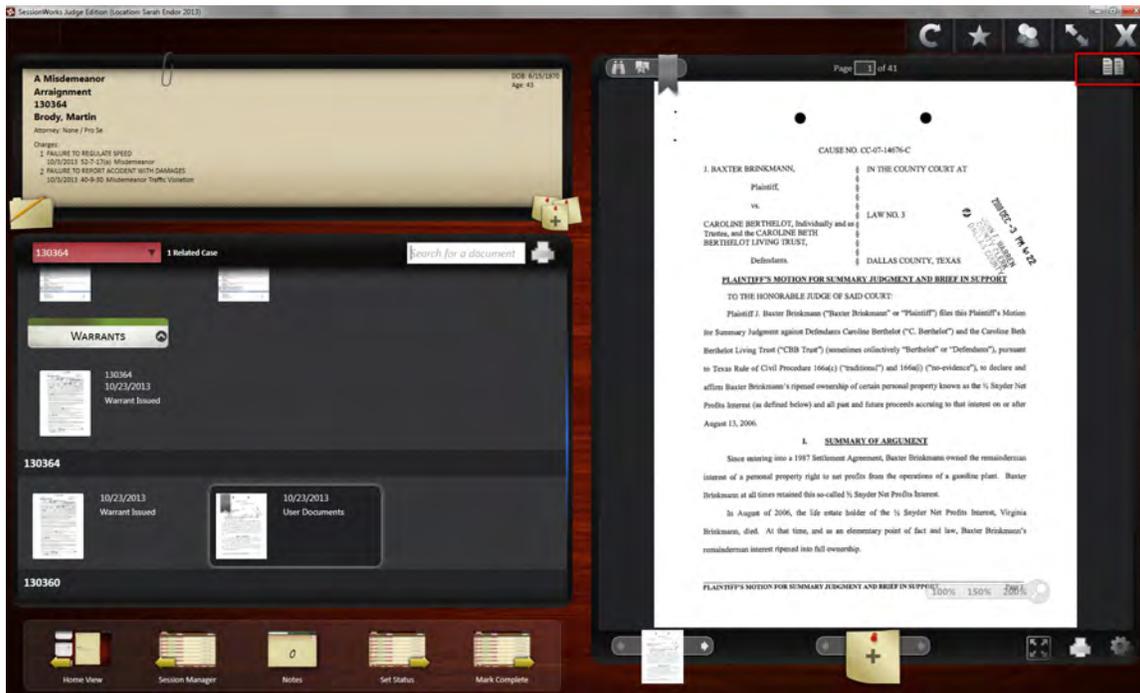


Figure 8.2 – Open a Second Document

In **Case View** two documents can be viewed at a time by tapping  at the upper right corner of the page, and then select the other document you wish to view. Both documents will then be displayed side by side.

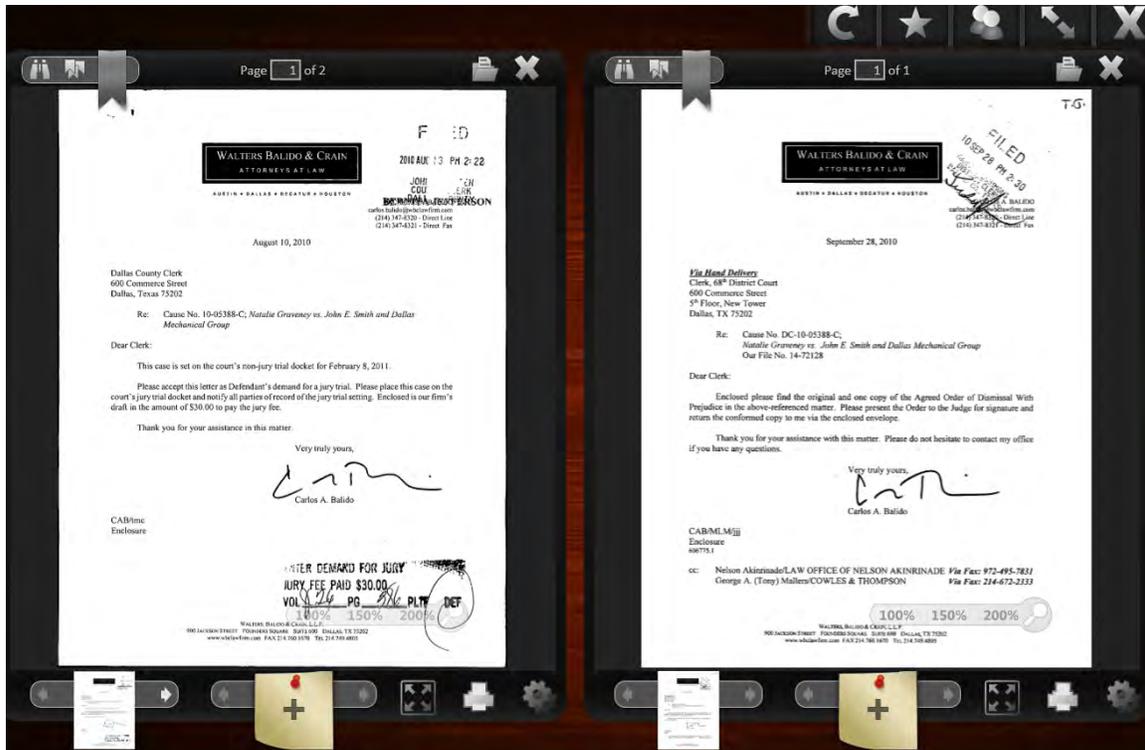


Figure 8.3 – Two Documents Side by Side

Download Documents

Users have the ability to download and view a PDF document.

Other supported file types include TIFF, JPEG, and PNG. Documents are automatically downloaded during the overnight process.

Note: In previous versions of Judge Edition, TIFF files, which are scanned pieces of paper, were viewable. With the advent of eFiling, clerks now receive PDF documents electronically. Judge Edition now displays both TIFF and PDF file types. The Document Viewer does not callout one file type over another.

Print Documents

Users have the ability to print a document.

When viewing a document, tap the printer button  in the lower right corner of the page.

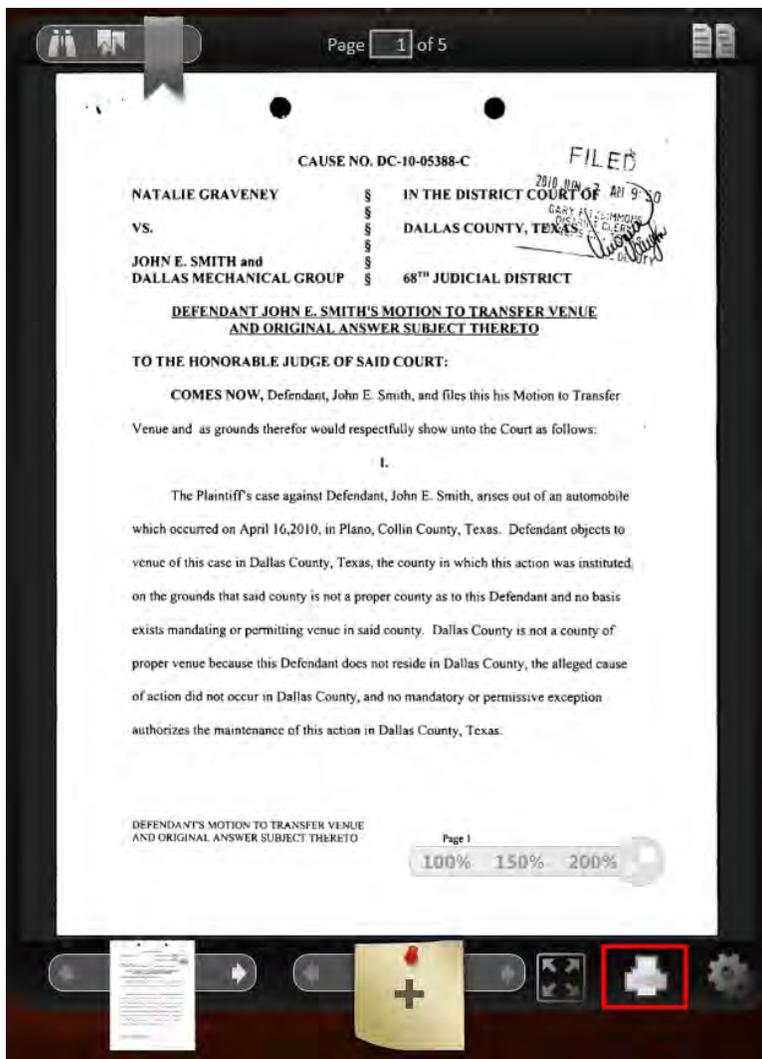


Figure 8.4 – Print Document

The *Print* dialog box will appear once selected.

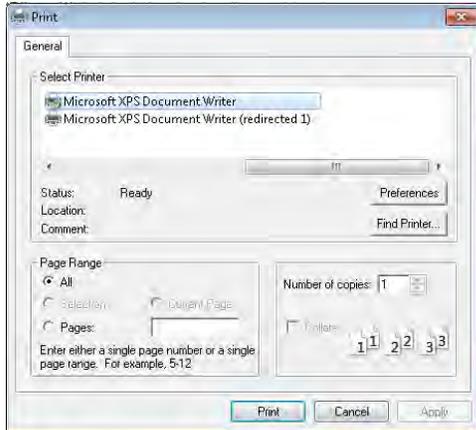


Figure 8.5 – Print Options Dialog Box

Copy Text From a Document

An option to copy text from a PDF document is available from the **Image Tools** menu.

If the document was originally added as a PDF in Odyssey with embedded text, the text can be copied/pasted from the document using the **Image Tools** menu.



Figure 8.6 – PDF with Image Tools Menu

Bookmark Pages of Interest

Bookmarks are for marking pages of interest. At any time users can scroll quickly forward and backward from bookmark to bookmark.

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 8.7 – Bookmarks

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

Removing a Bookmark

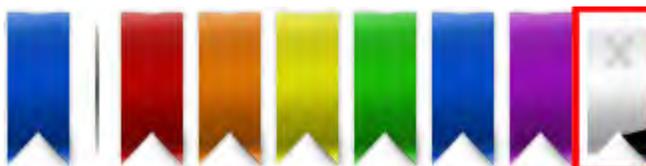
A bookmark can be removed from a page in a document.

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.

9 Notes

Topics Covered in this Chapter

- ◆ About Note Types
- ◆ Case Notes
- ◆ Working Notes from the Note List
- ◆ Page Notes

SessionWorks Judge Edition enables its user to attach notes to a whole case or to a specific page and location on a page within a document on a case. In addition to serving as information holders, notes have note types that trigger a call for action or restrict viewing to just the author. An easy-to-access list of notes provides a quick summary view of the case and page notes on an open case.

About Note Types

The note types are available on both case notes and page notes.

The note types are:

Note Type	Description
Note	Viewable by all Judge Edition users, except attorneys.
Important	Serves as a call for action.
Private	Belongs to the original author. Viewing, editing, and deleting is only done by this user.

Case Notes

Notes are added on an open case in **Case View**.

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.

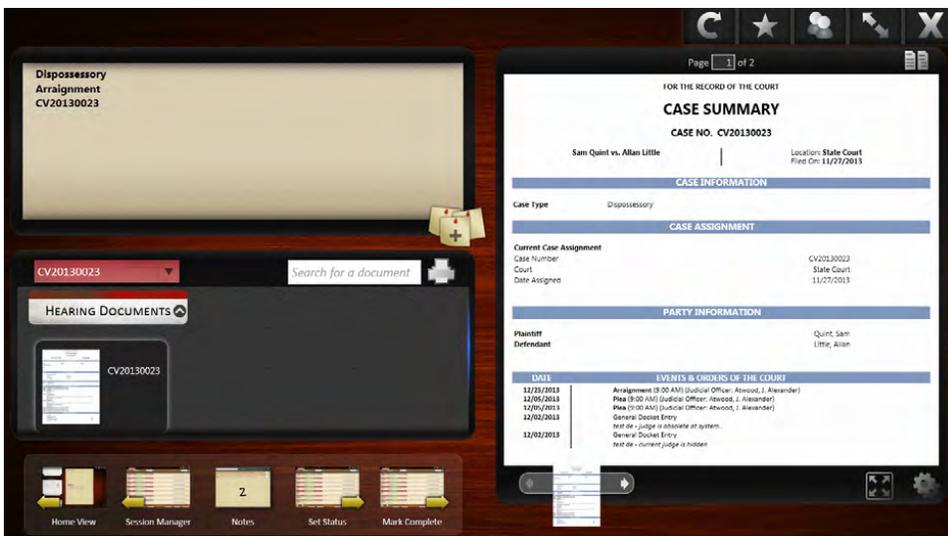


Figure 9.1 – Case Details Pane on an Open Case

To add a note to an open case:

1. On the **Case Details** pane, tap  to open the notepad.

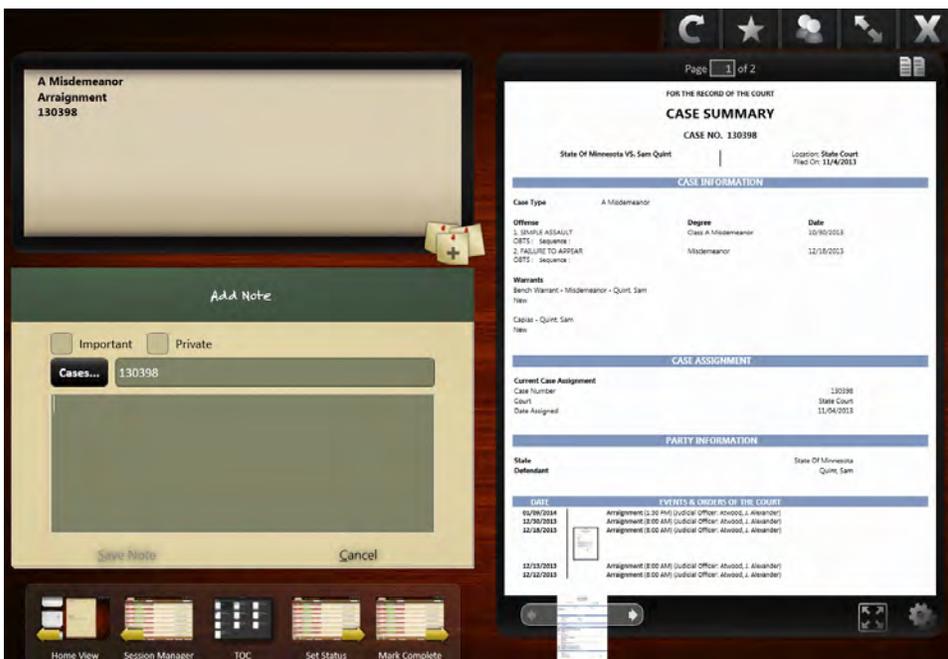


Figure 9.2 – Case Notepad – Add a Note

2. Type note text.
3. If appropriate, set a note type (important, private).
4. Tap **Save Note**.

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.

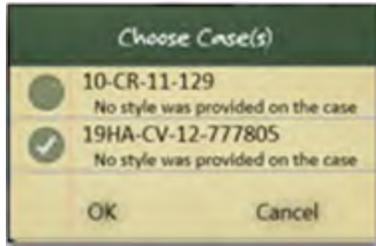


Figure 9.3 – Case Notepad Listing Cases in a Paper Clip

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**.

Working Notes from the Note List

The **Notes** button displays the total number of note entries on the current case.

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.

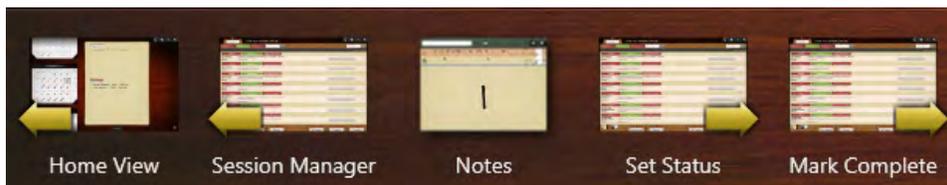


Figure 9.4 – Case Nav Pane

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.



Figure 9.5 – List of Case Notes on an Open Case

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).

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.



Figure 9.6 – Search Text Box on the Note List

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

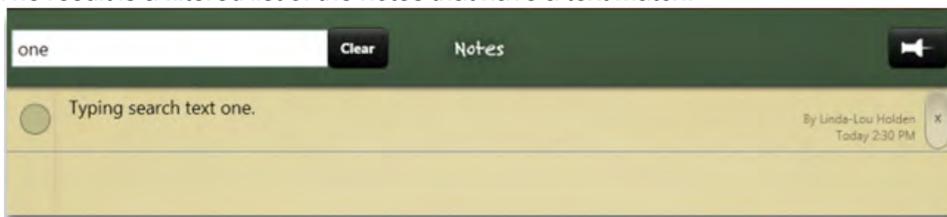


Figure 9.7 – Note List Refreshed with the Results of the Search

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

Acknowledging a Note

An important note can be acknowledged when read. Any user can acknowledge or unacknowledged a note; you do not have to be the initial author. The note list opens with the important notes in red at the top of the list.

To acknowledge (as read) an important note, tap the circle at the left of an entry on the note list.

This action inserts a check mark within the circle. An acknowledged, important note changes background color and no longer appears at the top of the note list when the associated case opens.

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.



Figure 9.8 – Deleting a Note

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.

Undocking, Moving, Resizing, and Docking the Note List

A note list can be moved, resized, and redocked.

To undock the note list, move it, resize it, and redock it:

1. Tap the white tack at the top of note list to undock.
2. Drag the note list to where you want it.
3. Touch the lower-right corner and drag the resize arrows to resize the note list.
4. Tap the blue oval **X** on the note list to redock.

Leaving Notes

Users can leave the **Notes** view and select other activities from the **Case Nav** pane.

To leave notes and select another activity, tap the appropriate button in the **Case Nav** pane.



Figure 9.9 – Case Nav Pane

Page Notes

Page notes are added to an open page.

The  page note marker flags the area to which its note applies. Page notes can be dragged to any location on the page.

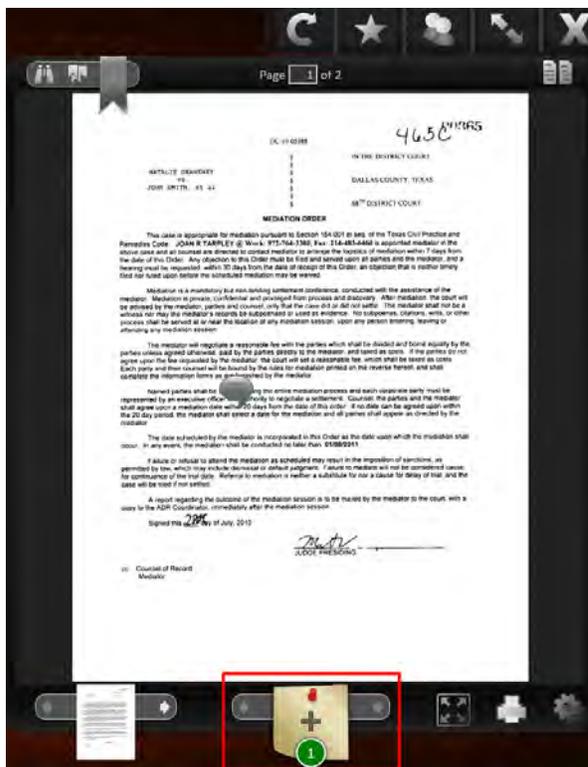


Figure 9.10 – Document with Page Note Button

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.

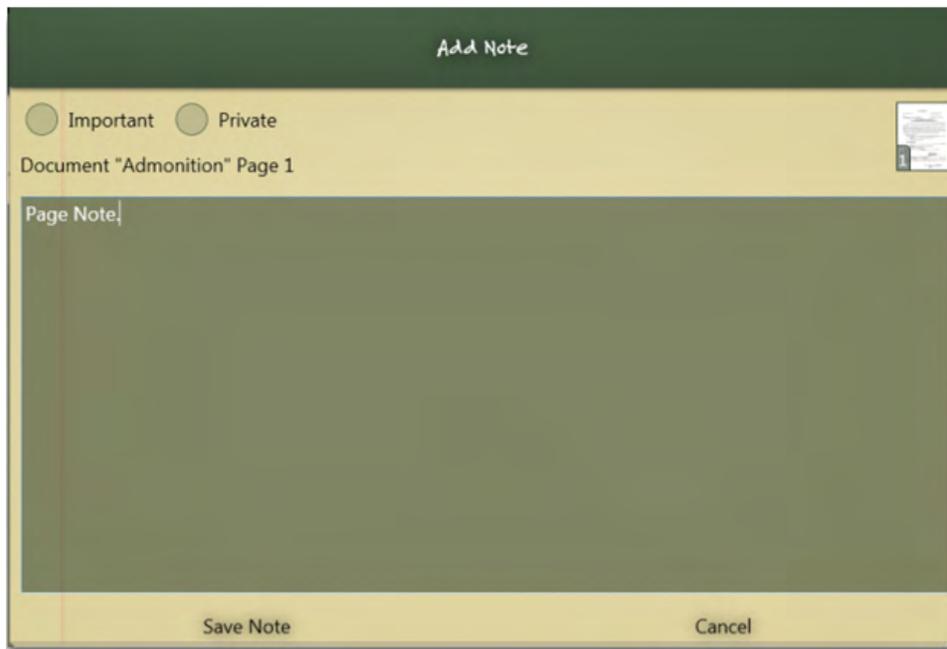


Figure 9.11 – Page Notepad

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.

Opening a Page Note and Moving the Marker

The  marker flags the area to which its note applies.
To use the marker:

1. Drag  to the desired location on the page.
2. Tap a marker to display the note text.

Editing a Page Note

Page notes can be edited.

To edit a note:

1. Tap a page note marker.

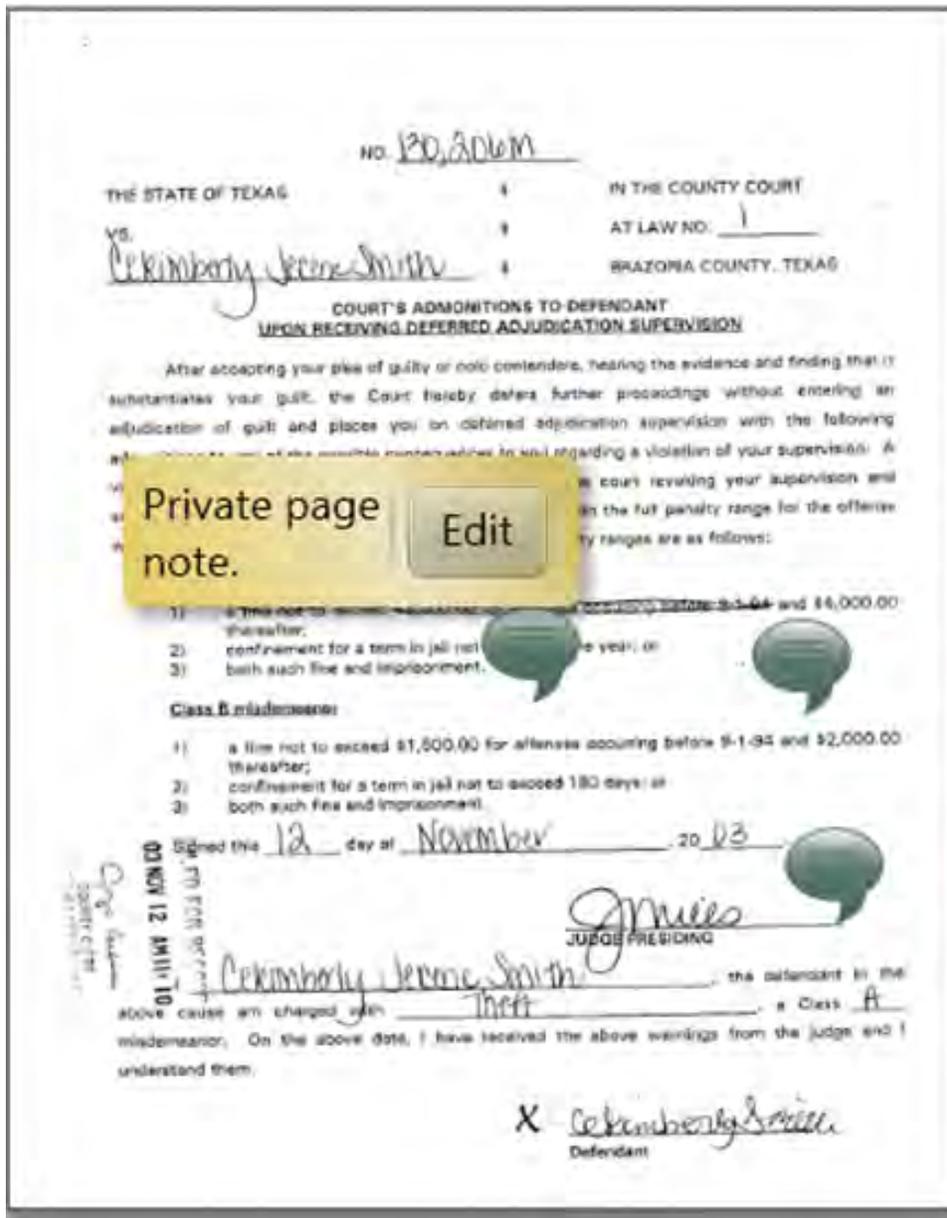


Figure 9.12 – Marker Tapped to Edit Note

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

Marking a Page Note as Important

When adding or editing an important page note, select **Important** on the notepad.

The **Important** setting on the notepad inserts a red page note marker.

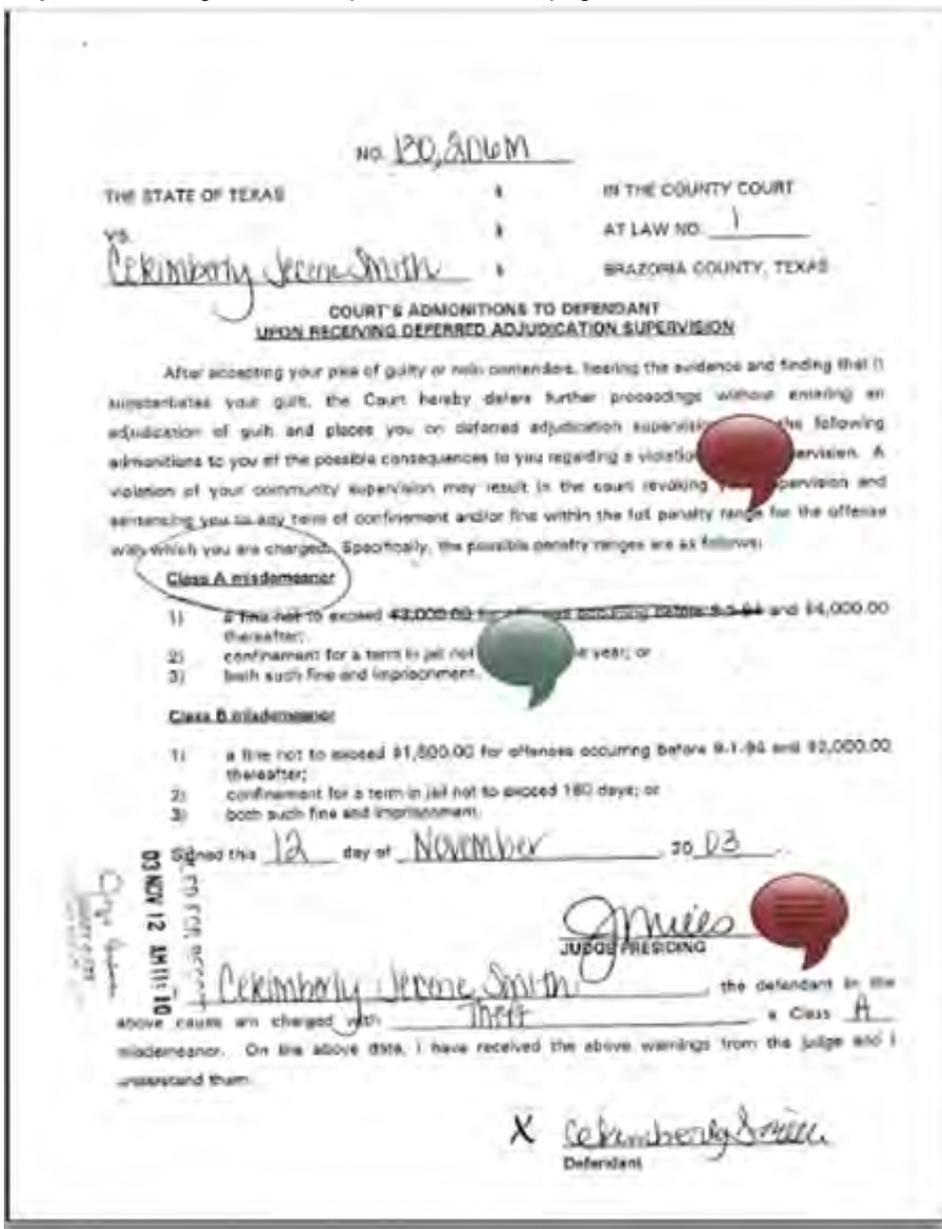


Figure 9.13 – Page Note Set as Important

10 Start and End a Court Session

Topics Covered in this Chapter

- ◆ Starting a Court Session
- ◆ Ending a Court Session

Use the appropriate method to open a case, and then refer to the appropriate topics for the facts and instructions for working specific tasks on a case.

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.

Ending a Court Session

A court session can end at any time whether all of the scheduled cases have moved into the **Complete** folder or not. Cases can remain in folders waiting to be viewed and/or worked.

Returning to **Home View** (to the calendars) takes you out of the current session to where you can select another session.

11 Judge Edition Configuration

Topics Covered in this Chapter

- ◆ Access to Configuration
- ◆ Judge Profiles
- ◆ Notes
- ◆ Resources
- ◆ Document Category Configuration
- ◆ Case Detail
- ◆ Connections
- ◆ About

When you launch Judge Edition, you must enter your user name and password. Rights to access Judge Edition are on the Case Manager role of the Case Manager user access record. The right is called “Access Judge Edition.”

Judge Edition prompts for resource configuration. Configure the judge, magistrate, or location setup on the calendar sessions being downloaded into Judge Edition. If your location was restored during an installation, no prompt is issued. You are now ready to begin using Odyssey SessionWorks Judge Edition.

Access to Configuration

Access to the configuration settings is from the **Home View**.

To open the main configuration page, tap  in the lower right corner.

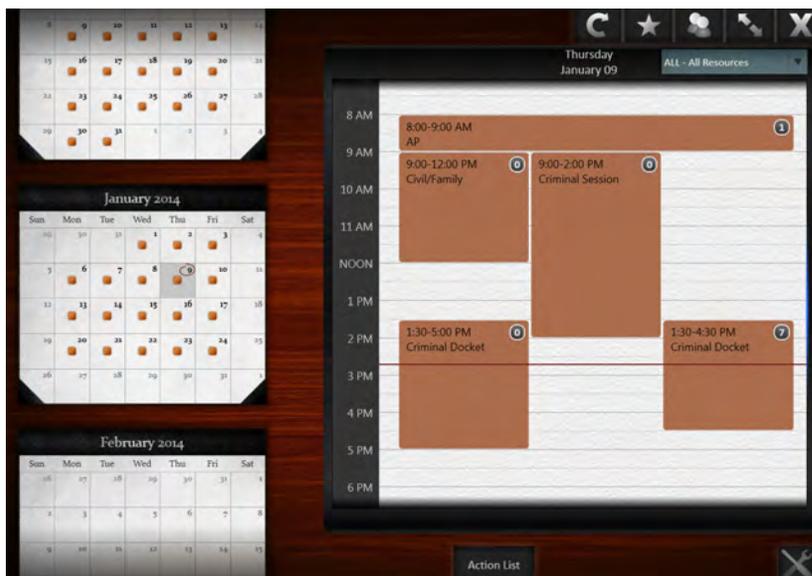


Figure 11.1 – Home View

The *Configuration* page is displayed.

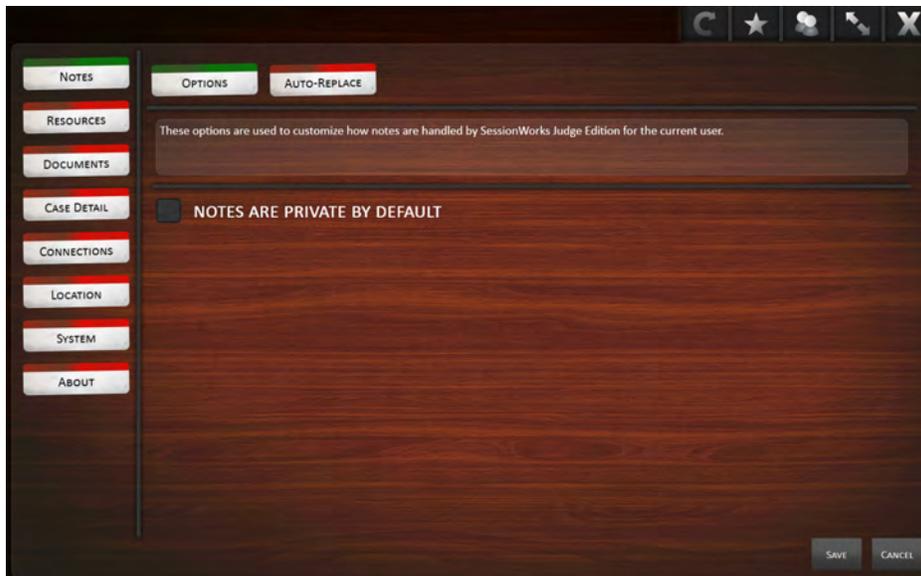


Figure 11.2 – Configuration Page

Judge Profiles

In Judge Edition, the configuration is tied to the user who is logged in.

The benefits to having the configuration tied to the user are:

- Roaming judiciaries will have their settings available anywhere they hold court.
- Each judge will have custom views pertaining to his or her case types and hearing types.

Configurations include the following:

- Note Preference (Private Default)
- Auto Text Replacement Entries
- Document Configuration
- Case Details

Configuration Features

There are several judge profile configuration features.

Document Groups

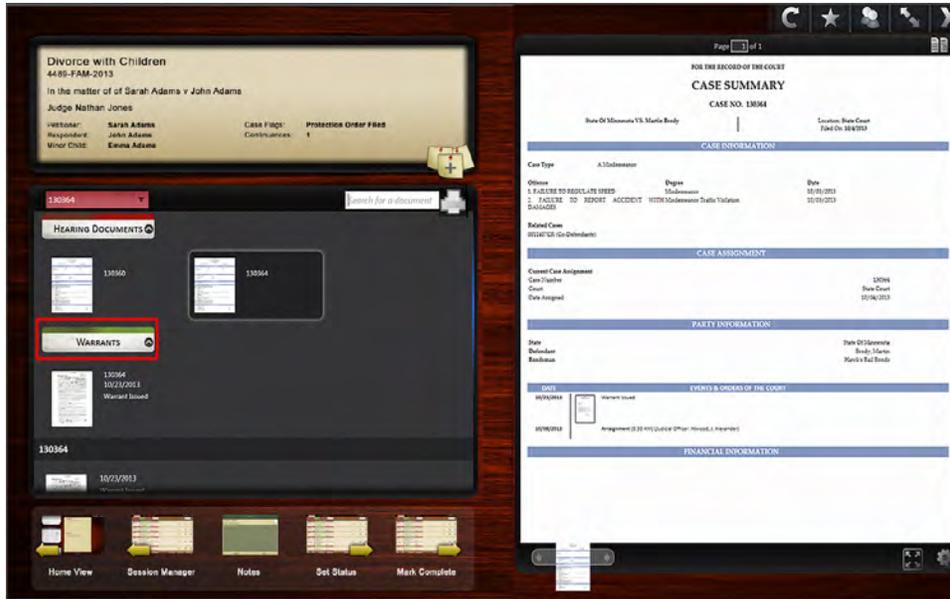


Figure 11.3 – Judge Profile–Document Groups

Table of Contents List View

Note:

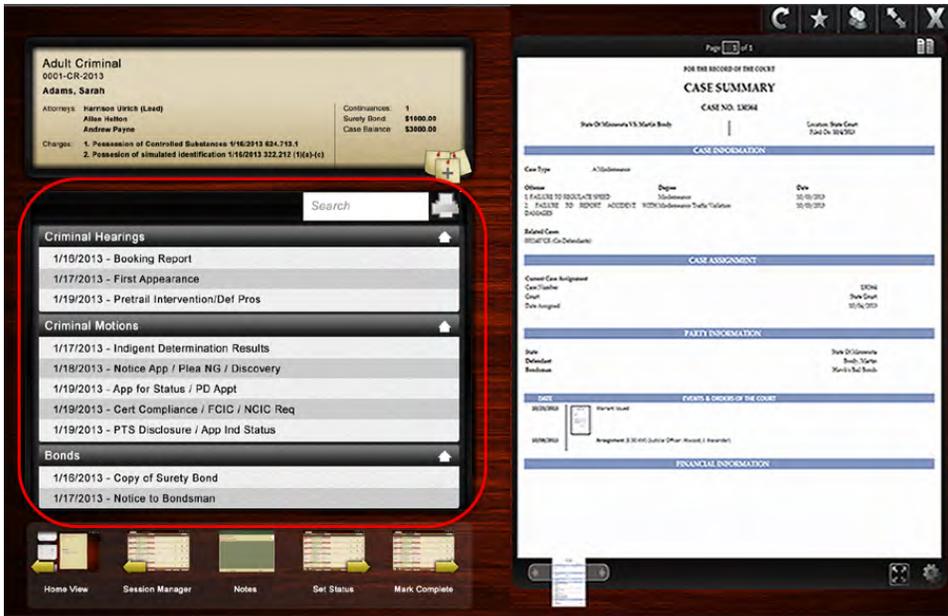


Figure 11.4 – Table of Contents List View

Customizable Case Details

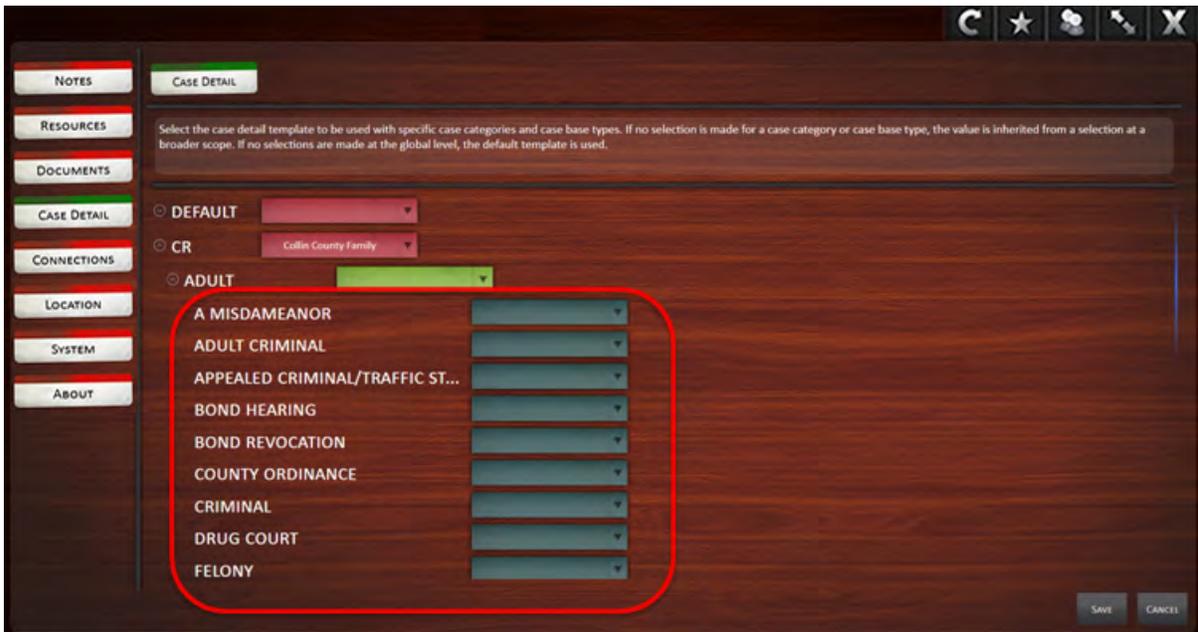


Figure 11.5 – Customizable Case Details

Toggle Paper Clipping

Judges have the ability to toggle the paper clipping function on or off.

Sticky Notes

Session Manager sticky notes remain available (persist) to each case when a paper clipped case is unclipped .

Change Download Window

Users have the ability to change the period of time in the past and in the future (download window) that sessions and/or documents and cases will download.

Prior to Judge Edition v3.0, the only way to set how far back and how far forward sessions, cases and documents would download was when Judge Edition was initially installed. If you wanted to change the download window (time frame) you had to uninstall, then reinstall the application.

In Judge Edition v3.0, the download window can be modified from the **Location** view by tapping  on the lower right corner on the **Home View** screen, then tap the **Location** label.

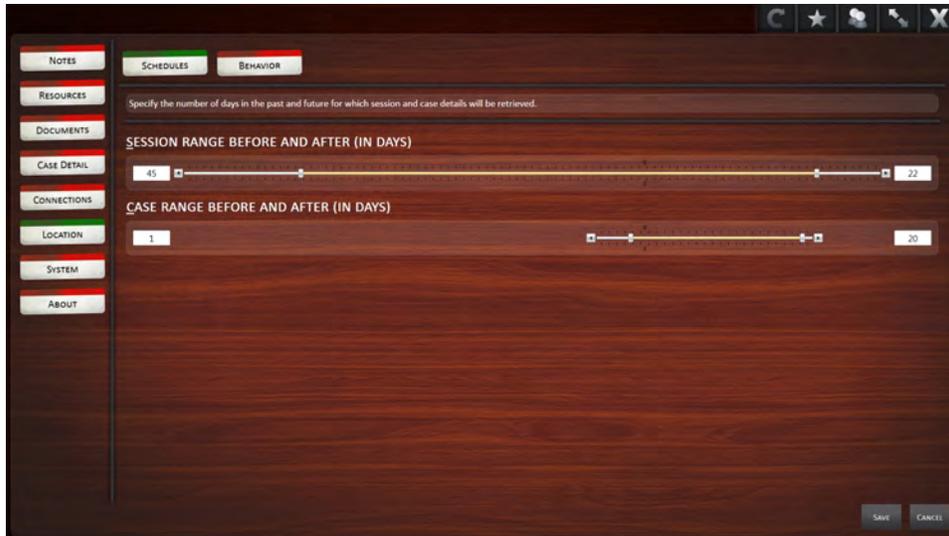


Figure 11.6 – Download Window

Notes

You have the option to set the note default to open as a **Private** note type. If the notepad is set to open as a **Private** note, you can clear this default setting.

Options

To have **Private** selected on the notepad when it opens, select the **Notes are Private by Default** check box.

To remove the private setting, clear this check box.

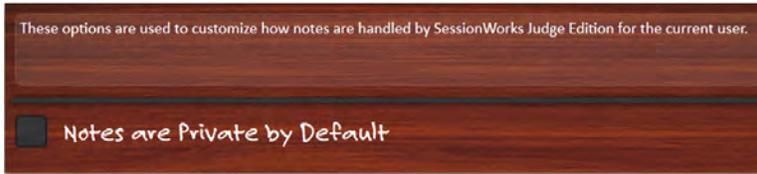


Figure 11.7 – Notes Set as Private by Default Dialog Box

Defining Replacement Text for Shorthand Codes Used in Notes

To speed up the entry of information on your notes, you can define a shorthand code (comprised of characters) that expands when you tap any of these expansion keys: spacebar, semicolon, period, comma, Tab, question mark, backslash, or Enter.

To define a shorthand code with its replacement text:

1. Tap the **Auto-Replace** tab to open the *Note Replacement Text* page.
2. Type the representative characters in the **Typed Text** text box.
3. Type the actual text to insert on the note in the **Replacement Text** text box.

For example, text typed as **DCNA** expands to “Defendant called in hall, no answer.”

4. Tap any one of the expansion keys.
5. Tap the **Add** button.
6. Tap the **Save** button.

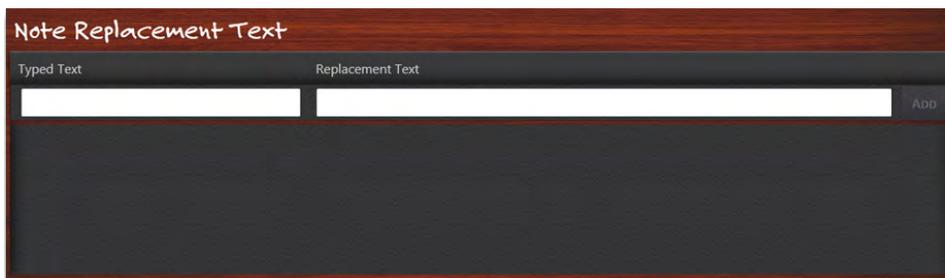


Figure 11.8 – Note Replacement Text Dialog Box

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**.

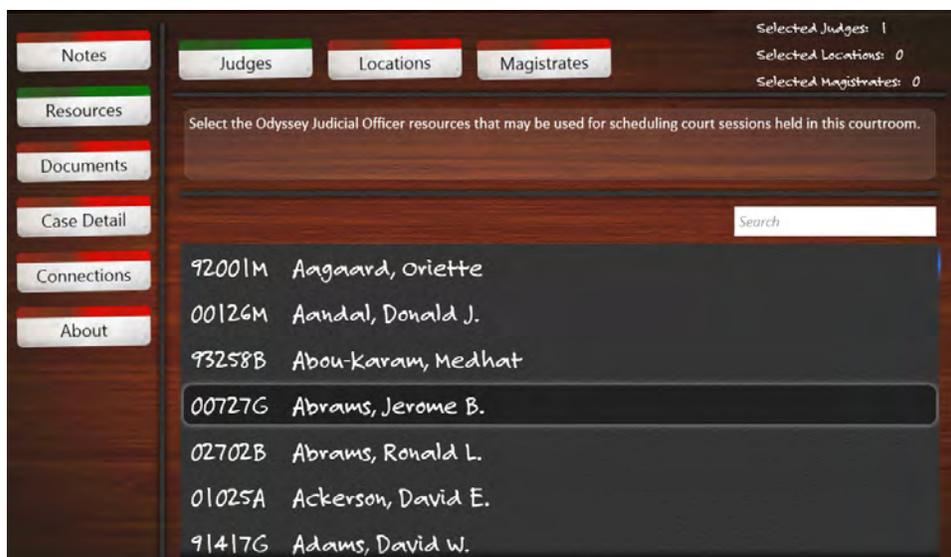


Figure 11.9 – Resources Tab, Judges Label

Document Category Configuration

Configure groups in your SessionWorks Judge Edition to display commonly referenced court documents on the *Case View* page. This feature enables judges to quickly access specific document types without scrolling through all documents associated with the case.

Hearing 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**. Documents attached to an event that is related to the current hearing will appear under **Hearing Documents** by default as well; this includes documents attached to a child event of an event related to the current hearing.

Set Up a Document Group Category

This section shows you how to set up a **Document Group Category** that will be displayed in the **Hearing Documents** section on the Judge Edition *Case View* page.

Setting Up a Document Group Category

Complete the following steps to set up a **Document Group Category**:

1. From the *Home* page, click  to access the *Configuration* page.
2. Click the **Documents** label to access the *Documents Groups Configuration* page.
3. Click  to open the *Category* dialog box.

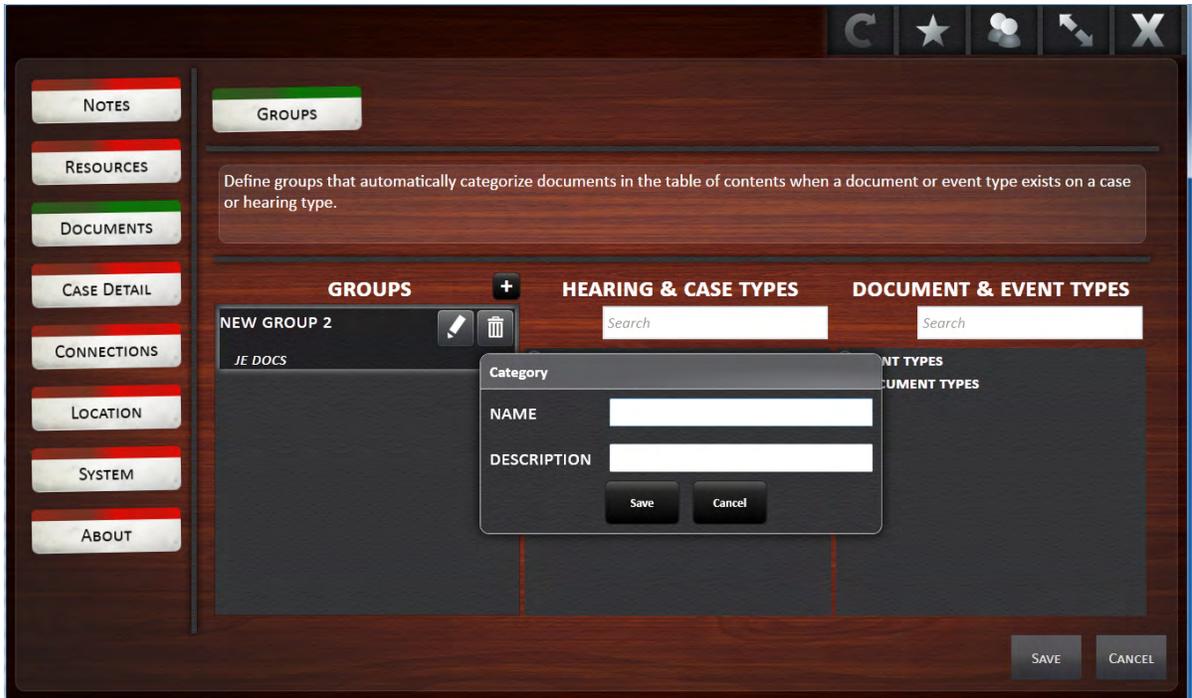


Figure 11.10 – Documents Groups Category Dialog Box

The following fields are displayed on the *Documents Groups Configuration* page.

Field	Description
HEARING & CASE TYPES	<p>Click  next to CASE TYPES or HEARING TYPES to display the drop-down list. Alternately, you can type a hearing type name, case type name, or code in the Search field to display the drop-down list. You can then select a hearing or case type.</p> <p>Note: You can select a hearing type and/or a case type. If you select both, then hearing and case types are still displayed in the designated category in the Hearing Documents section if the document meets either criterion, once mapped.</p>
DOCUMENT & EVENT TYPES	<p>After selecting a hearing or case type, click  next to EVENT TYPES or DOCUMENT TYPES to display the drop-down list. Alternately, you can type an event type name, document type name, or code in the Search field. You can then select an event or document type.</p> <p>Note: You can select a document type and/or an event type. If you select both, then any document and event types are displayed in the designated category in the Hearing Documents section if the document meets either criterion, once mapped.</p>

4. Type a name for your new category in the **Name** field, and then type a description for the category in the **Description** field.
5. Click **Save**.

Mapping Hearing Document Types to Your Group Categories

Complete the following steps to map document types to your group categories:

1. From the **Home** page, click  to access the *Configuration* page.
2. Click **Documents** to access the *Document Configuration* page.
3. Select a **Category** from the **Groups** column, or click  to add a new **Category**.

Note: Follow the steps in the **Setting Up a Document Group Category** section if you have not already set up a **Category**.

4. Type a hearing or case type in the **HEARING & CASE TYPES Search** field, and then select the **CASE TYPE(S)** or **HEARING TYPE(S)** to be mapped.
5. Type a document or event type in the **DOCUMENT & EVENT TYPES Search** field, and then select the **DOCUMENT TYPE(S)** or **EVENT TYPE(S)** to be mapped.
6. Click **Save**.

Note: After saving your hearing document types, you must restart **SessionWorks Judge Edition** before the changes will take effect.

Example Scenario

Create a group called “Warrants” and map documents related to a warrant event to that category.

Type *arraignment* in the **HEARING & CASE TYPES Search** field, and then type *warrant* in the **DOCUMENT & EVENT TYPES Search** field. Select **WARRANT ISSUED** from the drop-down list. Any document attached to this event type in Odyssey will now become a hearing document, if mapped, as described in the **Mapping Hearing Document Types to Your Group Categories** section.

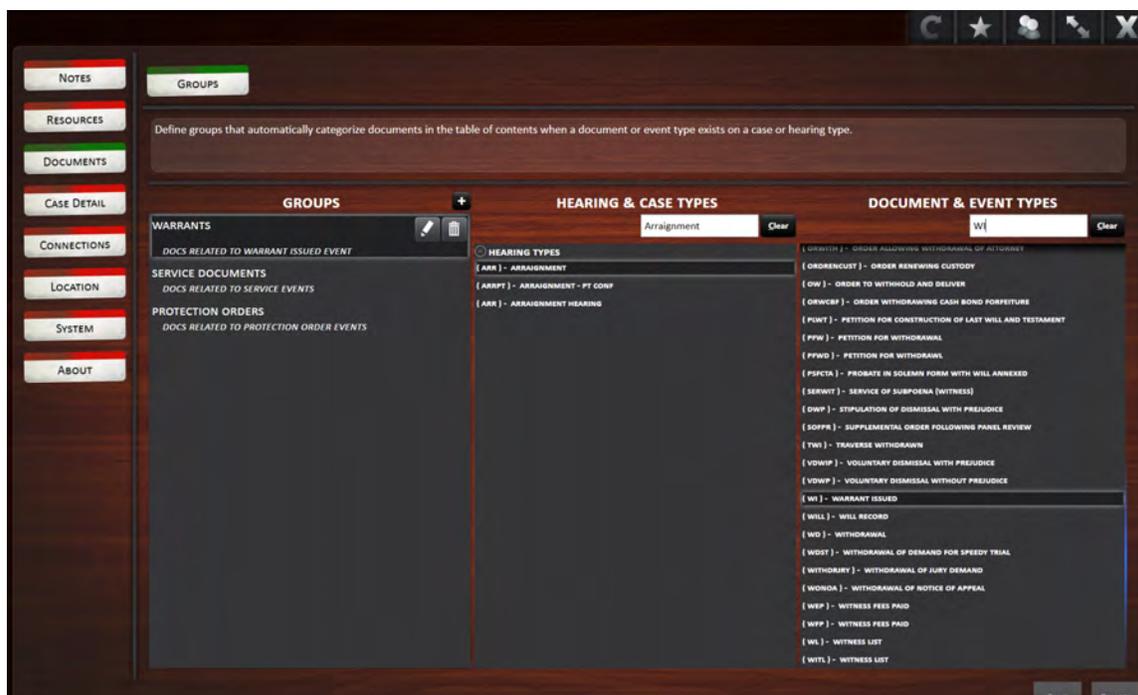


Figure 11.11 – Document Configuration Warrants Group

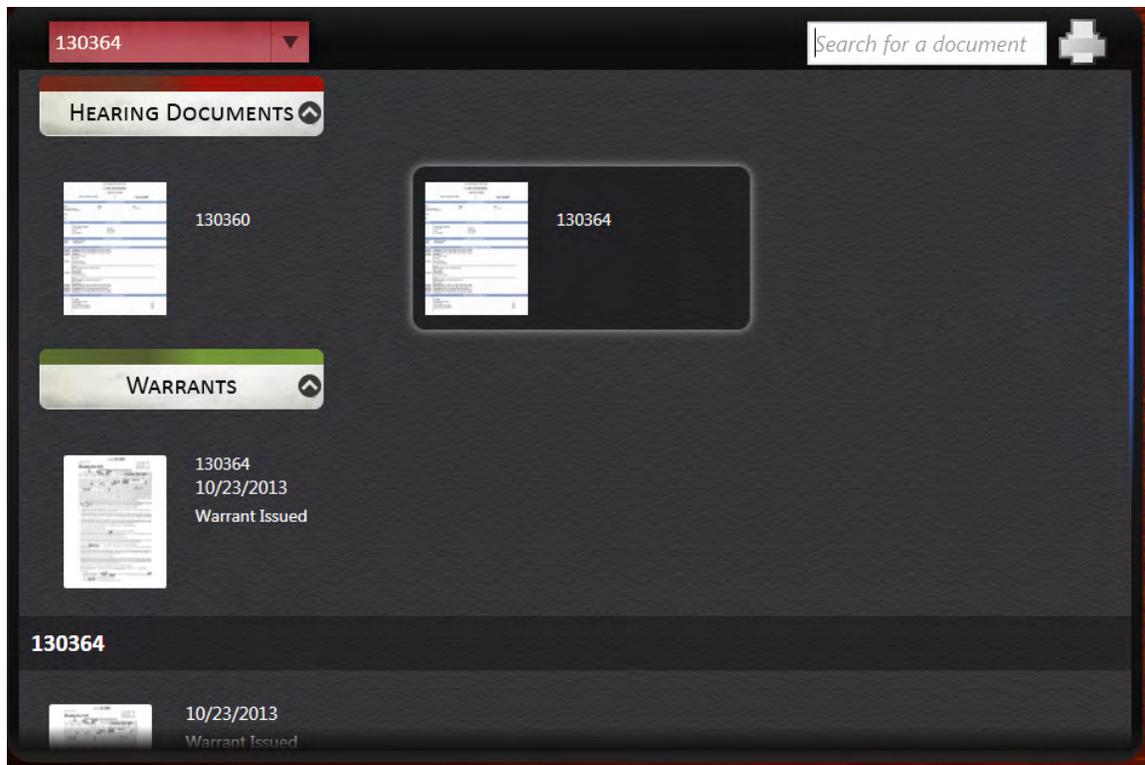


Figure 11.12 – Final Categories on Case View Page

Case Detail

Case Detail enables you to select the information to appear on **Case View** in the **Case Details** pane. For the case categories – criminal, civil, family, and probate – set options by case category. Where available, you can further set options by case category or base case type

If no settings exist, SessionWorks retrieves all information by default.

Case Detail

Select the case detail template to be used with specific case categories and case base types. If no selection is made for a case category or case base type, the value is inherited from a selection at a broader scope. If no selections are made at the global level, the default template is used.

Default

CR

CV

FAM

PR

Figure 11.13 – Case Detail Label

Connections

See your administrator for details.

About

Read about this application and the team that developed it.