

---

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

---



## Training Manual

### Case Manager View Only Module

*Version 1.0*

**Important:** Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

# Table of Contents

	i
Case Manager Basics	3
1. Accessing Odyssey	3
1.1. Signing On to Odyssey	3
1.2. Signing Off of Odyssey	4
1.3. Case Manager Rights and Roles	4
2. Odyssey Design and Layout	4
2.1. Case Manager Home Page	5
2.1.1. Navigation Menu	5
2.1.2. Working Space	5
2.1.3. Menu Bars	5
2.1.4. Window Header	6
2.1.5. Message List Window	6
2.1.6. Product Center List	6
2.2. Dialog Boxes	6
3. Odyssey Navigation and Standard Conventions	7
3.1. Keyboard Navigation	7
3.1.1. Tab Key	7
3.1.2. Arrow Keys	7
3.1.3. Function Keys	7
3.1.4. Hot Key	8
3.2. Mouse Navigation	8
3.2.1. Commonly Used Icons & Buttons	8
3.2.2. Tab Navigation	8
3.2.3. Hyperlinks	8
3.2.4. Tool Tips	9
3.3. Data Fields	9
3.3.1. Blank Data Entry Fields	9
3.3.2. Drop-Down Box	9
3.3.3. Radio Button	9
3.3.4. Check Box	10
3.3.5. Manual Date Entry	11
3.3.6. Shortcut Formulas for Dates	11
3.3.7. Using the Calendar Icon	11
4. Case Basics	12
4.1. Case Search	12
4.2. Summary	14
4.3. Detail	15
4.4. Parties	16
4.5. Cause of Action	17
4.6. Charges	18
4.7. Events	19
4.8. Service	20
4.9. Hearings	21
4.10. Warrants and Body Attachments	22
4.11. Bonds	23
4.12. Exhibits	24
4.13. Disposition	25
4.14. Financial	26
4.15. Documents	27
4.16. Forms	28
5. Viewing Calendars	29
5.1. Introduction	29

5.2.	Monthly View	30
5.3.	Monthly View -Calendar Icons	31
5.4.	Calendar Capacities	31
5.5.	Calendar Icons	32
5.6.	Calendar Buttons	32
5.6.1.	Preferences	33
5.6.2.	Select Calendar	33
5.6.3.	Refresh	34
6.	Printing Calendars	34



## 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.

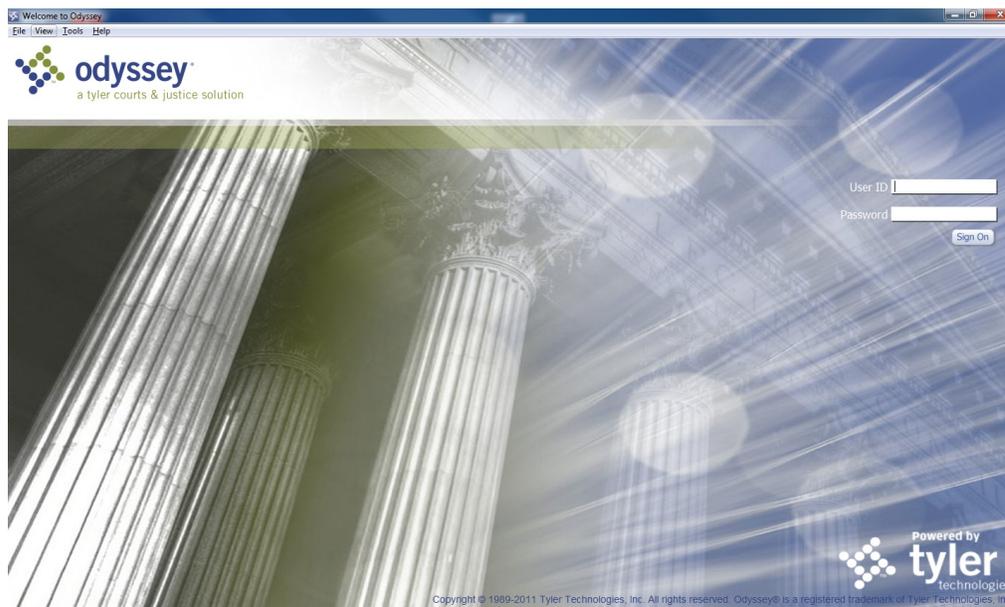


Figure 1-1 Welcome to Odyssey Window

- Type your **User ID** and **Password**.
- Click the **Sign On** button. 
- The Case Manager Home Page (Figure 1-2) appears.



## 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**.

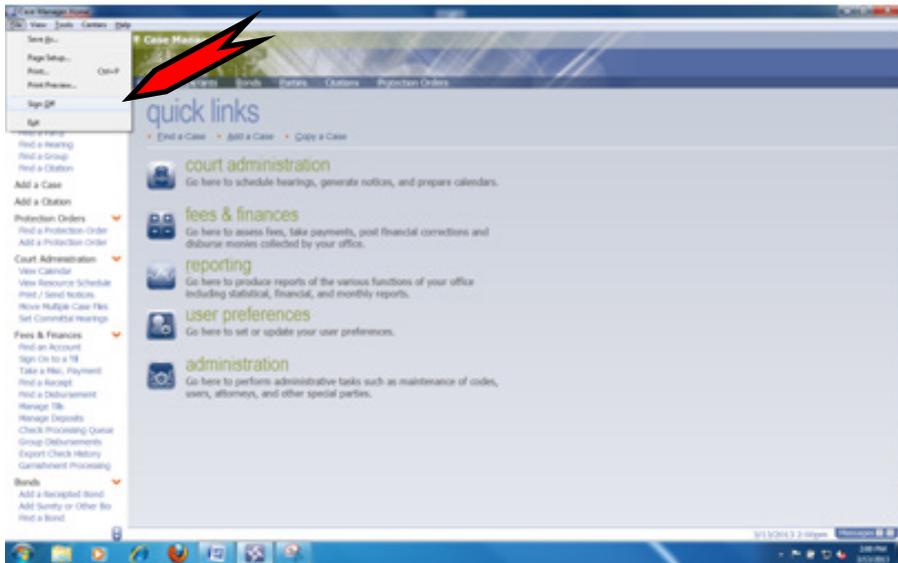


Figure 1-2 Case Manager Home Page

## 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, and Message List Window.

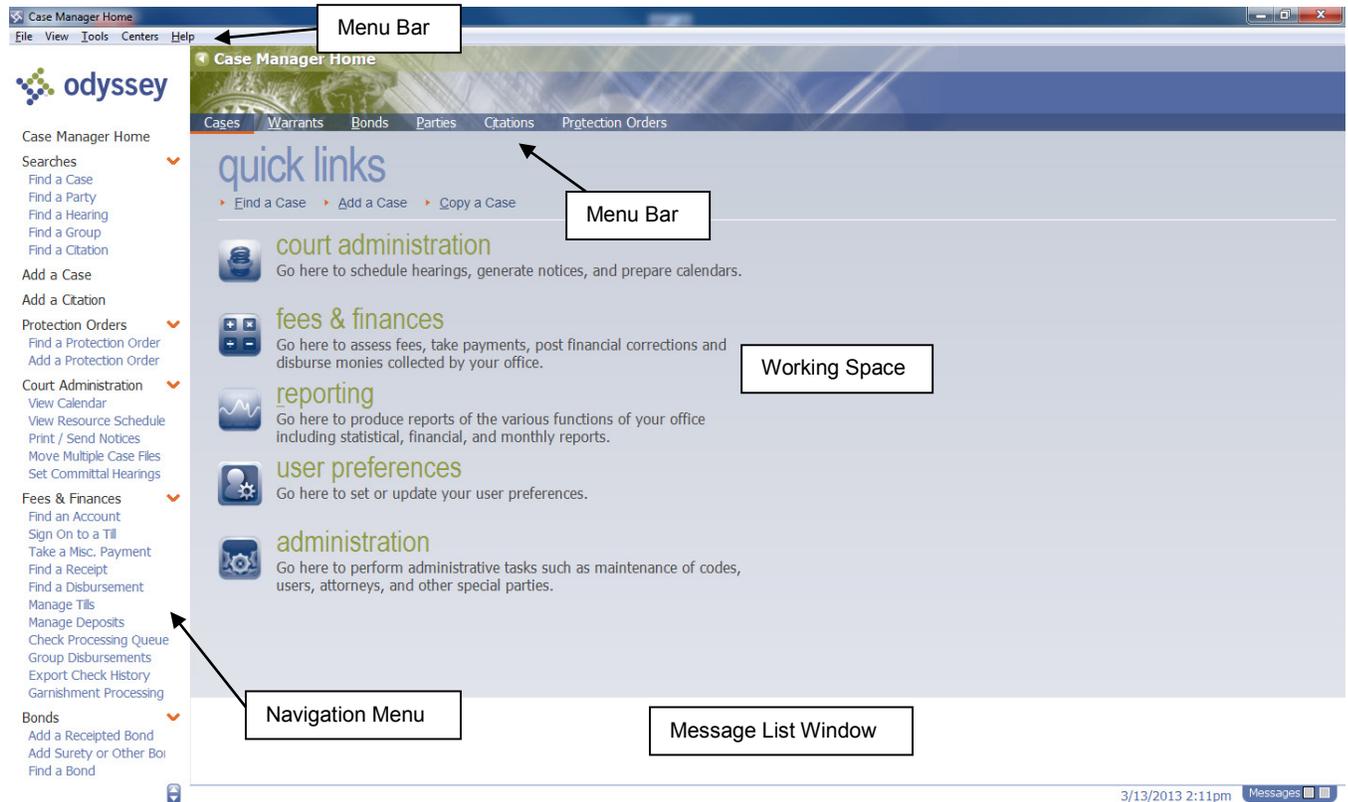


Figure 2-1 Case Manager Home Page

### 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:

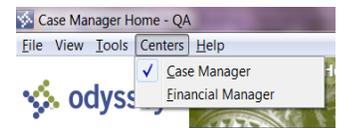
- Critical errors which must be corrected before saving
- Warning messages
- Informational messages

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 Centers List 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.



## 3. Odyssey Navigation and Standard Conventions

### 3.1. Keyboard Navigation

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

#### 3.1.1. 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.

#### 3.1.2. 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

#### 3.1.3. 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).



### 3.1.4. 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.



## 3.2. 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.

### 3.2.1. 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.

### 3.2.2. 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.

### 3.2.3. Hyperlinks

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





### 3.2.4. Tool Tips

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.

## 3.3. 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 dark blue to the left.
- Required data fields have a white background and are outlined in bright blue.
- Data fields which may be left blank have a beige background.

### 3.3.1. 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.

### 3.3.2. 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” allows 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.



### 3.3.3. 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.





### 3.3.4. 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* the **Select All** button.

The screenshot shows a form titled "type of party" with a "Select All" button. Below the title is a list of options, each with a checkbox:

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



### 3.3.5. 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.

### 3.3.6. 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 the date field.

Formula:	The Resulting Date:
T or t <input type="text" value="t"/>	Today's Date <input type="text" value="10/22/2007"/>
t + or - <#> <input type="text" value="t+6"/>	Today's date plus or minus the number of days <input type="text" value="10/28/2007"/>
w + or - <#> <input type="text" value="w+6"/>	Today's date plus or minus the number of weekdays <input type="text" value="10/30/2007"/>
beg <input type="text" value="beg"/>	First day of the current month <input type="text" value="10/01/2007"/>
end <input type="text" value="end"/>	Last day of the current month <input type="text" value="10/31/2007"/>
<day abbr> <input type="text" value="tues"/>	<b>Tues-</b> Tuesday of the current week <input type="text" value="10/23/2007"/>
last <day abbr> <input type="text" value="last tues"/>	<b>last tues-</b> Tuesday of last week <input type="text" value="10/16/2007"/>
next <day abbr> <input type="text" value="next tues"/>	<b>next tues-</b> Tuesday of next week <input type="text" value="10/30/2007"/>

### 3.3.7. 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.





## Case Basics

### 3.4. 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).

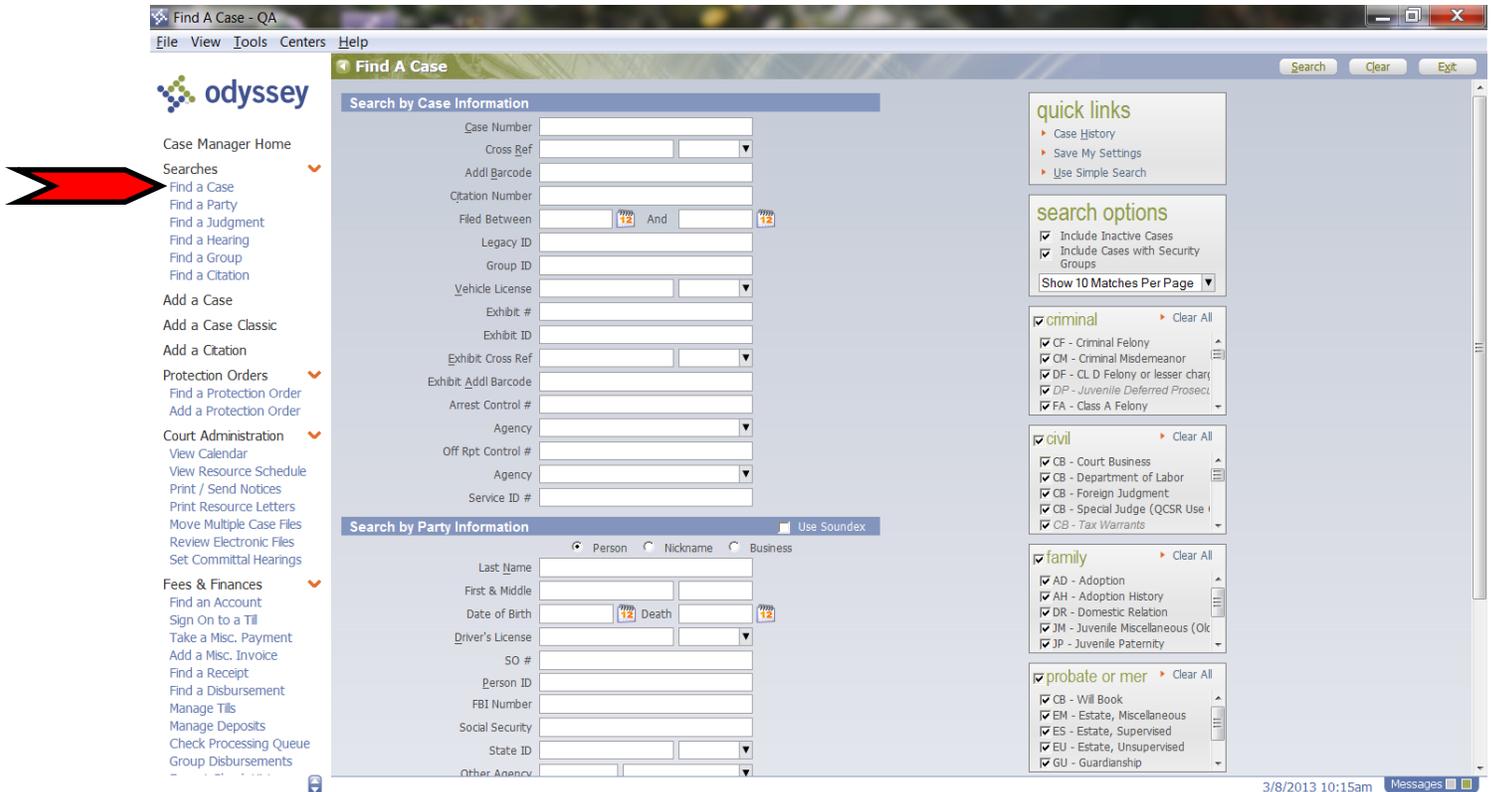


Figure 5-1 - Find a Case Window

- **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 5-2). 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 ten 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 browser window with the title 'Search Results'. The page contains a table of search results. A red arrow points to the case number '30D02-0706-FD-000901' in the first column of the second row. The table has columns for case details, including case number, title, offense description, filing date, status, judicial officer, court, attorney, connection, and party information.

Case Number	Title	Offense Description	Filed On	Status	Judicial Officer	Court	Attorney	Connection	Filed As	Party ID
IF		SEE CCS FOR OFFENSE INFORMATION	12/30/2004	Decided	Marshall, Dan E	Hancock Superior Cc		DEF	Smith, Ryan A	
<a href="#">30D02-0706-FD-000901</a>	<b>State Vs. Ryan A. Smith</b>	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	06/11/2007	Pending	Marshall, Dan E	Hancock Superior Cc	Gray, Stephen Geral	DEF	Smith, Ryan A	2469992
IF		SEE CCS FOR OFFENSE INFORMATION	12/09/1997	Decided	Marshall, Dan E	Hancock Superior Cc		DEF	Smith, Ryan D	
<a href="#">30D02-9712-IF-005261</a>	<b>St V Ryan Smith</b>	Speed:65 Speed Zone: 55								
IF		SEE CCS FOR OFFENSE INFORMATION								
<a href="#">30D02-9905-IF-001983</a>	<b>St V Ryan Smith</b>	Speed:64 Speed Zone: 50								
IF		SEE CCS FOR OFFENSE INFORMATION								

Figure 5-2 Case Search Results Screen



### 3.5. 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 shows the Odyssey CMS interface for case 30D02-0706-FD-000901. The main content area is titled 'Summary' and displays the following information:

- Case Name:** State Vs. Ryan A. Smith
- Lead Attorney:** Gray, Stephen Gerald
- Retained:** 08/01/2007
- Status:** Pending
- Filed:** 06/11/2007
- Type:** FD - Class D Felony
- Court:** Hancock Superior Court 2
- Judicial Officer:** Marshal, Dan E
- Financial Balance:** 0.00

**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 Convictior	(FD)	06/10/2007
3. OWI WITH PRIOR OWI WITHIN 5 YEARS	(FD)	06/10/2007

**Most Recent Events & Hearings:**

Date	Event Type	Description
09/10/2009	Converted Event	Calendar :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
08/21/2009	Converted Event	REPORT TO THE COURT FILED BY ADA. DM (RJO? N)   JTS Minute Entry Date: 2009-08-21
11/10/2008	Converted Event	Calendar :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 Mir
09/22/2008	Converted Event	Calendar :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.

**Defendant Demographics:** White Male, DOB 08/07/1983, SSN 312-02-1085

**Case Cross Reference:** Legacy System Number D207FD00901

**Flags & Actions Due:** (Empty)

Figure 5-3 Summary Tab



### 3.6. 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 shows the 'Detail' tab for case 30D02-0706-FD-000901. The case title is 'State Vs. Ryan A. Smith' and the type is 'FD - Class D Felony'. 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 shows a legacy system number of D207FD00901. The 'Case Status' section shows the date 06/11/2007 and the status 'Pending'. The 'Related Cases' section is currently empty. 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 5-4 Detail Tab



### 3.7. 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

Figure 5-5 - Parties Tab

30D02-0706-FD-000901

Summary Detail **Parties** Charges Events Service Hearings Conditions Notes Disposition Time Stds Financial Prot. Orders Warrants

State Vs. Ryan A. Smith  
Type: FD - Class D Felony

Group By: Connection Type Show: Active Parties/Participants

Related Parties View

Party & Attorney Information		<a href="#">Add Party</a>	<a href="#">Add Attorney</a>	<a href="#">Add Group/Associate</a>
State Plaintiff	<a href="#">State of Indiana</a>		★ Chandler, Thomas Grey Augustine	
Defendant	<a href="#">Smith, Ryan A</a>		★ Gray, Stephen Gerald	
Participant & Attorney Information				
Miscellaneous Converted Recipient	<a href="#">Hancock County Clerk</a>			



## 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

48D01-0405-CC-000476

File View Tools Centers Help

48D01-0405-CC-000476

Summary Detail Parties Events Service Hearings Conditions **Causes** Disposition Time Stds Financial Prot. Orders Warrants Bonds Exhibits Documents Notes

Forms Save Exit

Personal Finance Co vs. Ralph Jones  
Type CC - Civil Collection

File Date	Causes of Action	Type	Description
03/08/2013	Garnishment	Claim	

Causes of Action Detail

Action Type: Claim  
Cause Code: Garnishment File Date: 03/08/2013  
Description:  
Filed By: Filed Against:

Remedies Sought: Monetary

3/8/2013 10:42am Messages

Figure 5-6 Causes Tab



### 3.8. 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

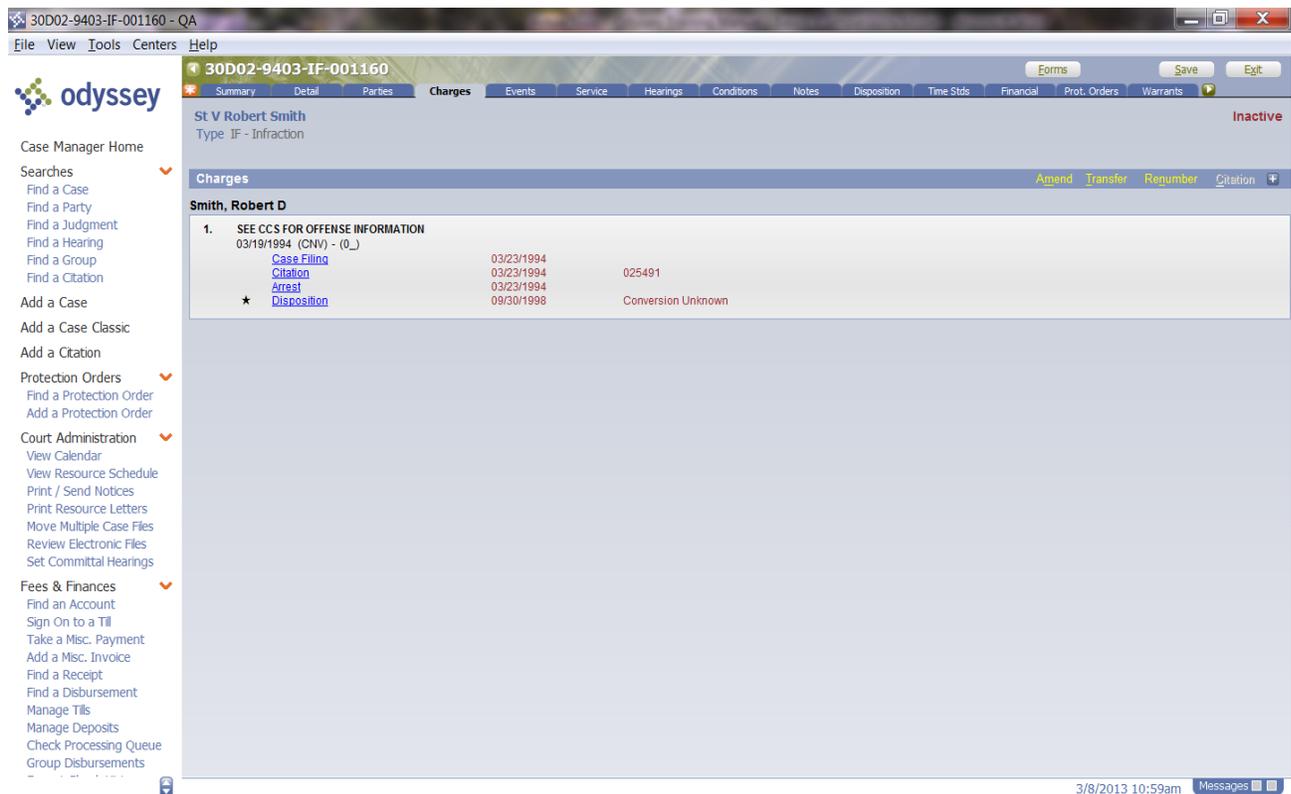


Figure 5-7 Charges Tab



### 3.9. 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 CMS interface for case 30D02-9403-IF-001160. The 'Events' tab is active, showing a list of events for 'St V Robert Smith' (Type: IF - Infraction). The events are as follows:

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. BMW NOTIFIED. SR16 HAND DELIVERED. KP (DISPOSED: GP ) (RJO? N)   JTS M
03/26/2003	Converted Event TERMINATED (RJO? N)   JTS Minute Entry Date: 2003-03-26

Figure 5-8 Events Tab



### 3.10. 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.

The screenshot shows the Odyssey CMS Case Manager interface. The main window title is "30D02-9403-IF-001160 - QA". The interface includes a menu bar (File, View, Tools, Centers, Help) and a navigation pane on the left with categories like "Case Manager Home", "Searches", "Add a Case", "Protection Orders", "Court Administration", and "Fees & Finances". The main content area displays the "Service" tab for case "St V Robert Smith" (Type: IF - Infraction). The "Events" sub-tab is active, showing a table of converted events:

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. SR.16 HAND DELIVERED. KP (DISPOSED: GP ) (RJO? N)   JTS M
03/26/2003	Converted Event TERMINATED (RJO? N)   JTS Minute Entry Date: 2003-03-26

The interface also shows a status of "Inactive" and a bottom status bar indicating "10 Results - Page 1 of 1" and the date/time "3/8/2013 11:00am".

Figure 5-9 Service Tab



### 3.11. 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

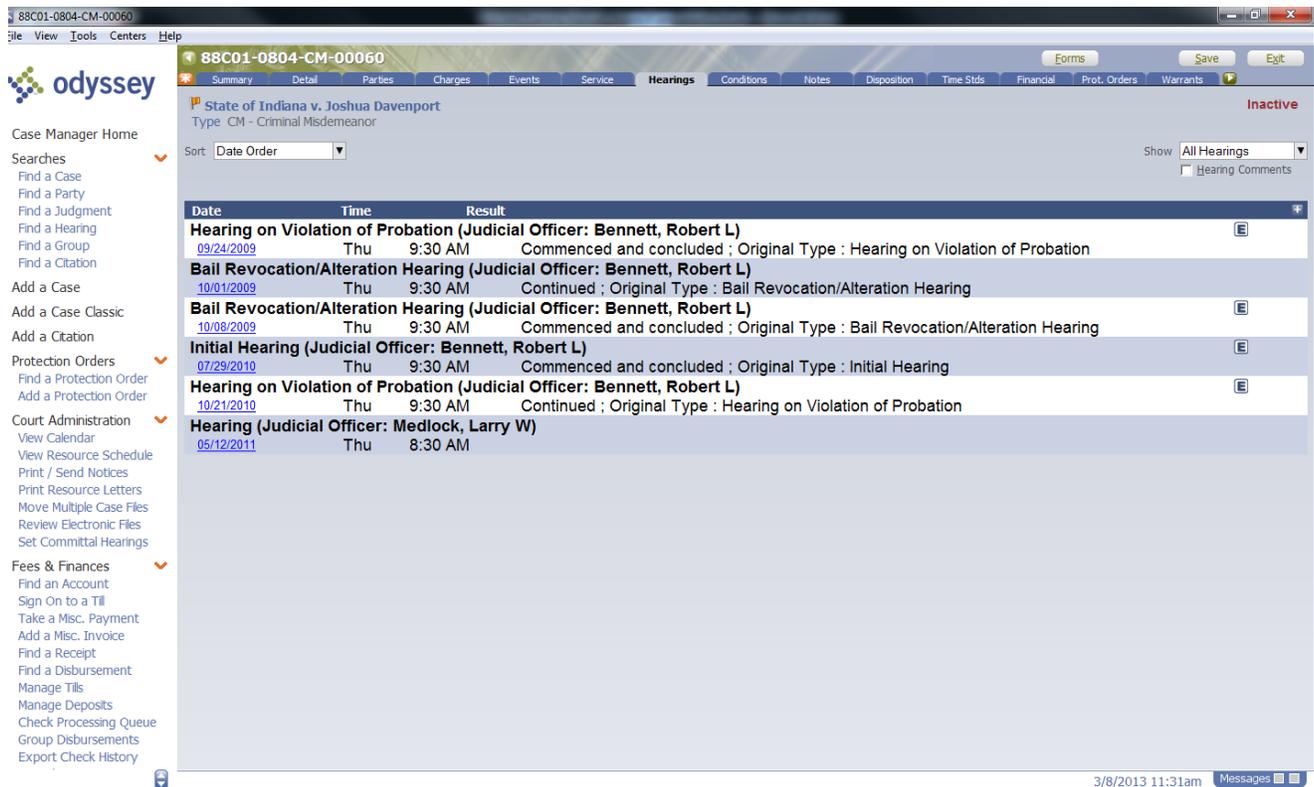


Figure 5-10 Hearings Tab



### 3.12. 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 CMS interface for case 88C01-0804-CM-00060. The main content area displays a table of warrants under the heading "Warrants on this case".

Case Number	Status	Warrant Type	Issued Date
88C01-0804-CM-00060 - 2	Served	Bench Warrant Sheriff's Office	Issued 11/16/2010
Davenport, Joshua T			
Case 88C01-0804-CM-00060			
35-42-2-1(a)(1)(A)/MA: Battery Resulting in Bodily Injury			
35-46-1-15.1(1)/MA: Invasion of Privacy			
Current Balance on Case(s) \$3,324.00			
88C01-0804-CM-00060 - 1	Served	Bench Warrant Sheriff's Office	Issued 09/17/2009
Davenport, Joshua T			
Case 88C01-0804-CM-00060			
35-42-2-1(a)(1)(A)/MA: Battery Resulting in Bodily Injury			
35-46-1-15.1(1)/MA: Invasion of Privacy			
Current Balance on Case(s) \$3,324.00			

Figure 5-11 Warrants Tab



### 3.13. 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

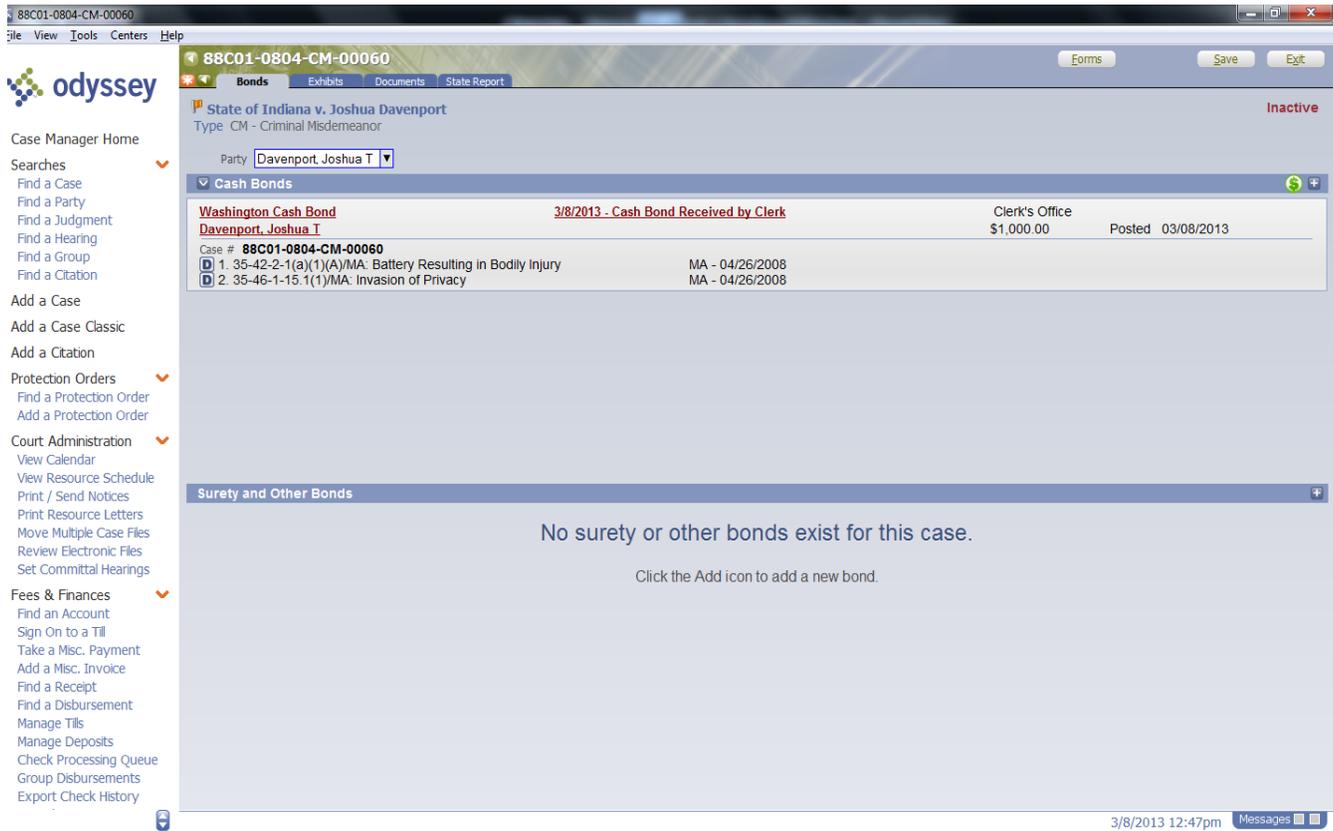


Figure 5-12 Bonds Tab



### 3.14. 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

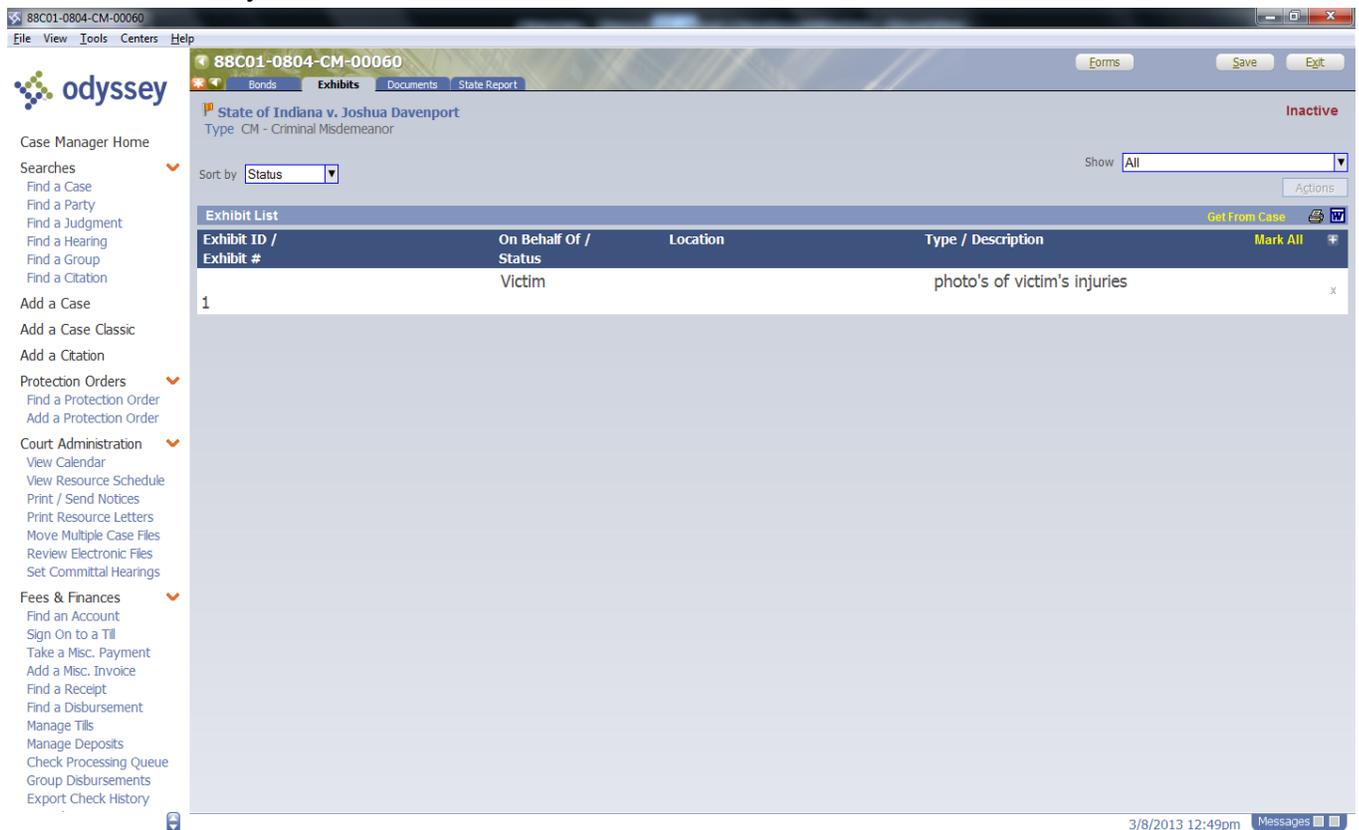


Figure 5-14 Exhibits Tab



### 3.15. 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

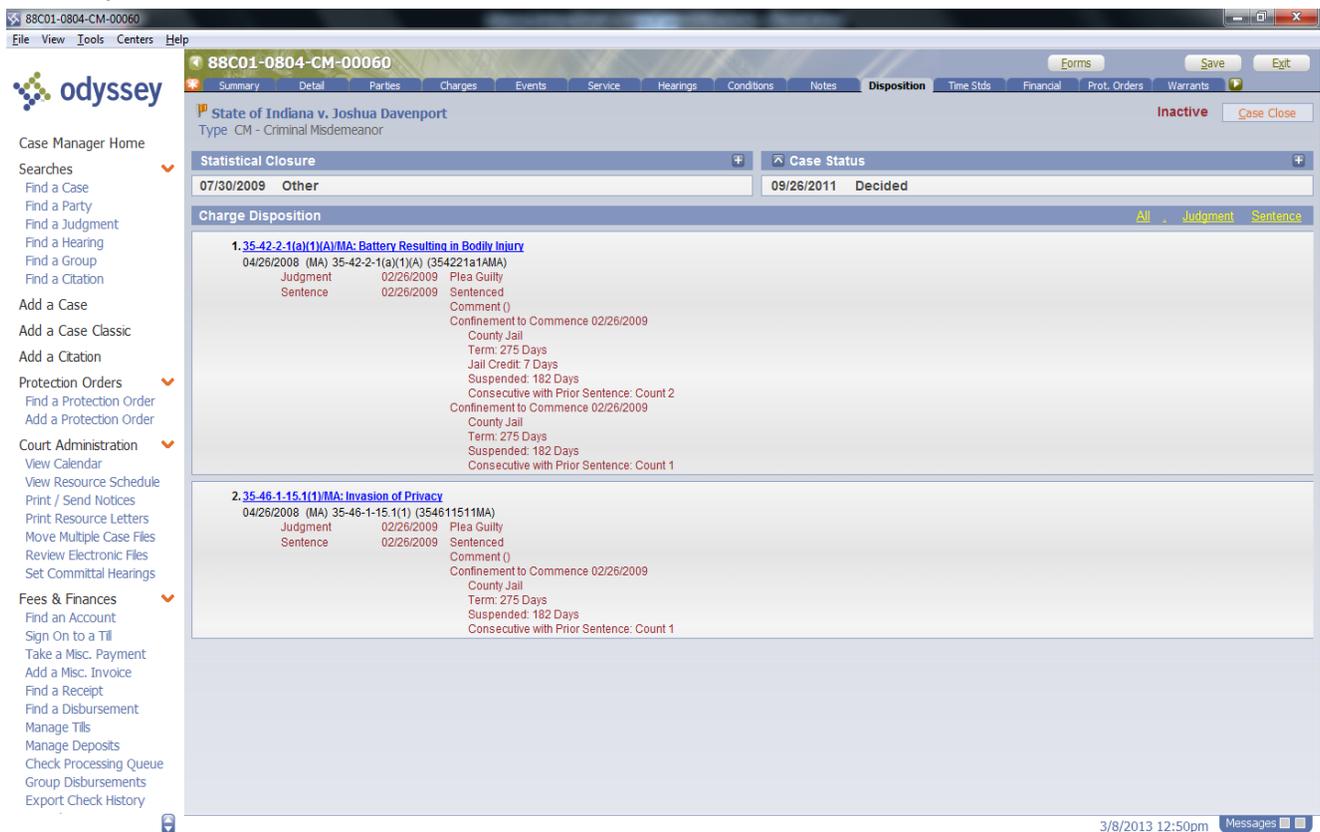


Figure 5-14 Disposition Tab



### 3.16. 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

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

Figure 5-15 Financial Tab



### 3.17. Documents

Access documentation entered on the case.

Functions performed on the Documents tab include:

- Form Instances (customized versions of forms)
- Word documents
- Images
- Job Output
- PDF File
- Photo
- Video File

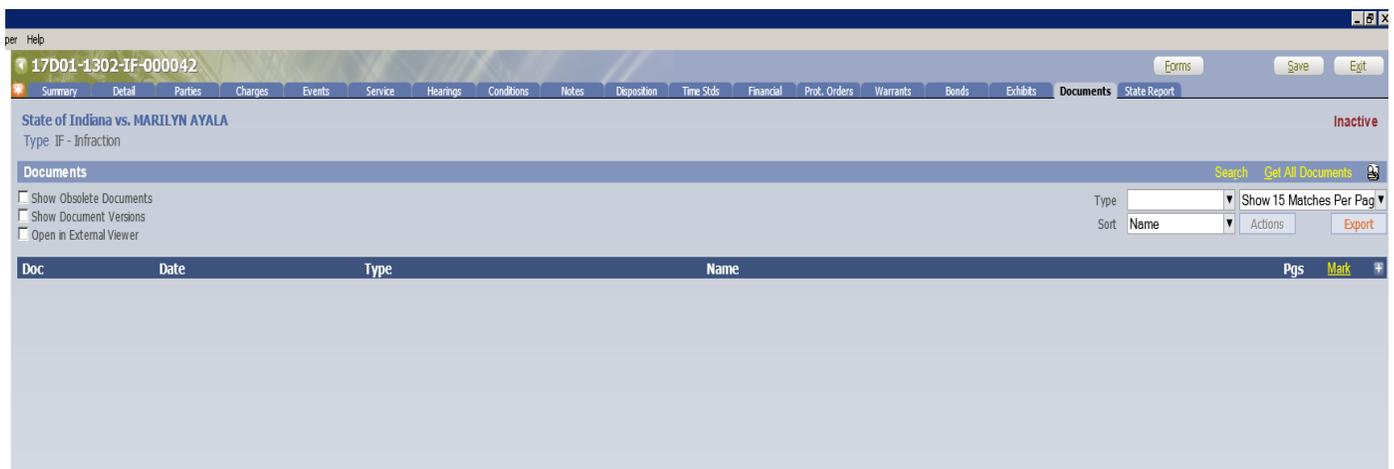


Figure 5-16 Documents Tab



### 3.18. 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

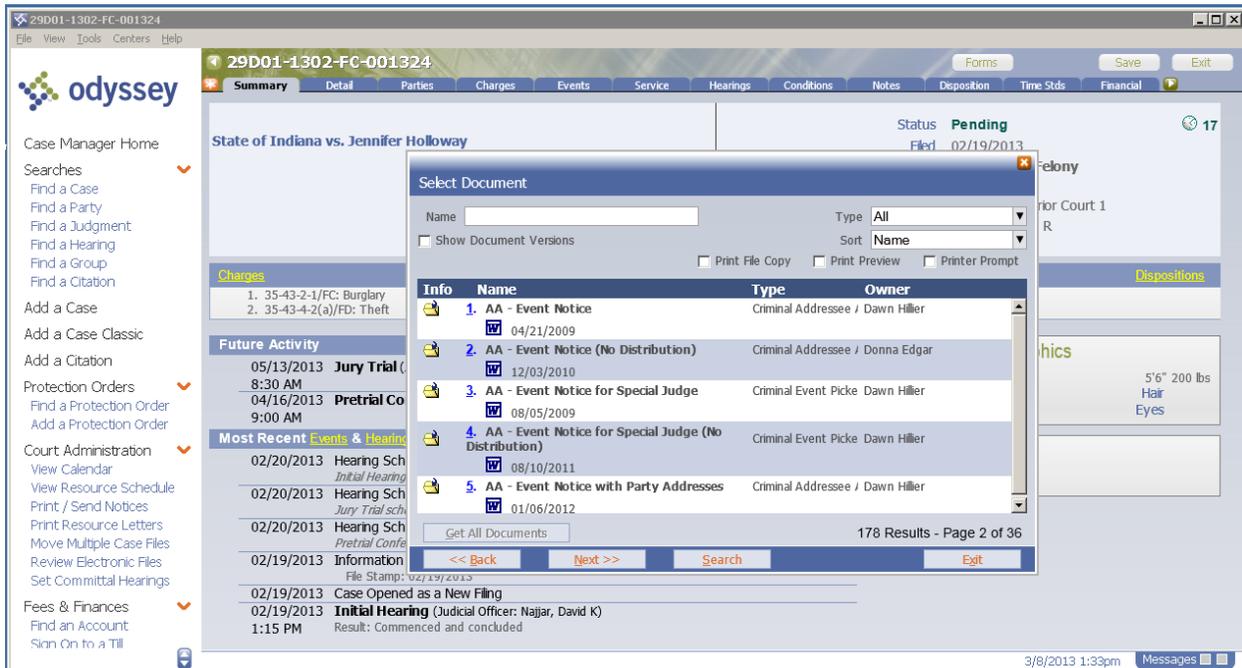


Figure 5-17 Documents Tab



## 4. Viewing Calendars

Detailed Calendar information will be covered in separate modules.

### 4.1. Introduction

**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 6-1).

- 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.

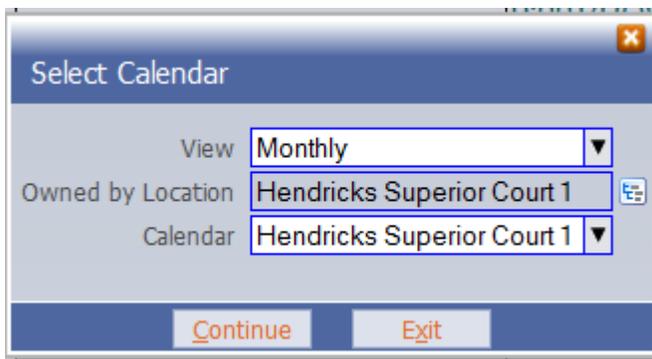


Figure 6-1 Select Calendar dialog box



## 4.2. 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.



Figure 6-2 Calendar Page (Monthly View)



### 4.3. 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 6-3 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.

### 4.4. 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)



## 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 6-5 Go To Date Dialog Box

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

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

## 4.5. 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.



### 4.5.1. 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 6-5).

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.

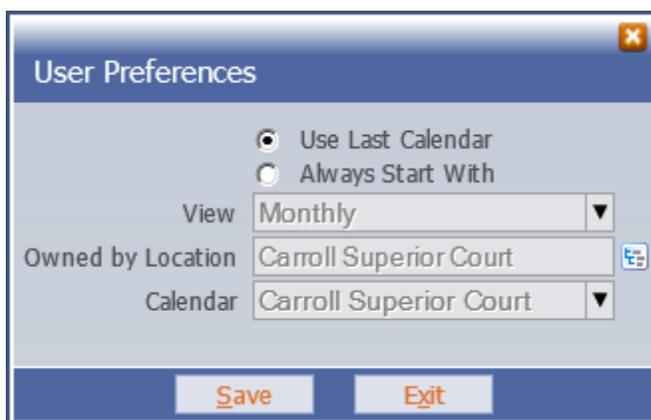


Figure 6-6 User Preferences dialog box

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

### 4.5.2. Select Calendar

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

- Click  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.

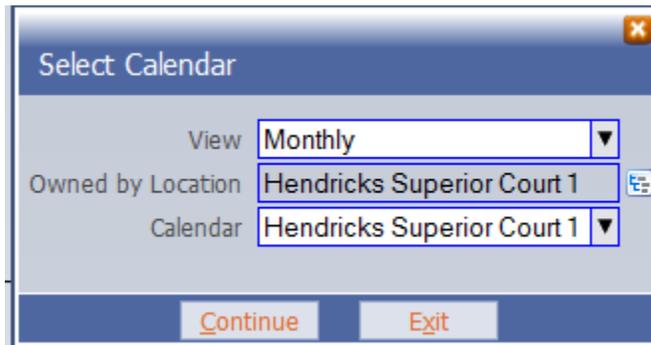


Figure 6-6 Select Calendar Dialog Box

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

### 4.5.3. Refresh

- Click  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.

## 5. Printing Calendars

1. Click on printer icon
2. At flexible calendar pop-up, click continue
3. In the pop up box, first choose the calendar form by clicking on the picker icon. When the form screen pops up you will see the county forms to choose from click on the gray W to choose the form you wish



Calendar Report  
Prints hearings related information for a particular calendar.

Clear Memorize Recall

Location: Carroll Superior Court

Report Body Template: [Dropdown]

Calendar: Carroll Superior Court

Date Range: Start Date: 03/22/2013 Friday, March 22, 2013; End Date: 03/22/2013 Friday, March 22, 2013

Report Options:  
 Include rescheduled hearings  
 Hide style/party detail on cases with Security Groups  
 Include blank rows at end of each hearing  
Number of rows: [Text Box]  
 Include page breaks after each court session

Draft [Dropdown]

Primary Sort: Case Number

Secondary Sort: [Dropdown]

List Name: [Text Box]

Submit Exit

4. Choose how you would like to sort the calendar and click View to bring up the calendar to print. This will open your Windows print menu to select your printer and preferences.

Session Report  
Prints hearings related information for a particular session.

Clear Memorize Recall

Report Body Template: [Dropdown]

Report Options:  
 Include rescheduled hearings  
 Hide style/party detail on cases with Security Groups  
 Include blank rows at end of each hearing  
Number of rows: [Text Box]  
 Include page breaks after each court session

Draft [Dropdown]

Primary Sort: Case Number

Secondary Sort: First Defendant's Last Name

List Name: [Text Box]

Submit Exit